



University of Exeter

Participant Information Sheet

Title of Project: The Equity Scorecard

Researcher name: The South West Social Mobility Commission (Beth Brooks & Anne-Marie Sim)

Invitation and brief summary:

This research project is benchmarking for the Equity Scorecard, a tool designed to support schools and trusts in identifying and addressing disparities in educational outcomes. The project will trial the scorecard with selected schools and trusts across the South-West Peninsula, with the aim of gathering feedback to fine-tune both the content of the scorecard and the process of its use, improving it for future users regionally and nationally. We appreciate your interest in this project and ask you to consider the following information carefully and ask your contact in the South-West Social Mobility Commission if you have any questions.

Purpose of the research:

We aim to pilot the Equity Scorecard, a self-assessment tool designed to help schools better support pupils from under-resourced backgrounds (as set out in the SWSMC's December 2024 report, available [HERE](#)).

This part of the evaluation aims to:

- *Collect elements of completed Scorecards from participating schools*
- *Aggregate this data to generate regional benchmarking averages*
- *Support schools in comparing practice*

No personal, pupil-level data is being collected.

Why have I been approached?

As you have expressed an interest in using the equity scorecard you have been approached to take part in this data aggregation. You can still use the Equity Scorecard resources without taking part in the data aggregation.

What would taking part involve?

Your school is submitting data from your Scorecard as part of this project. This includes school-level responses across categories. By returning this Scorecard, your data will contribute to:

- *Your individual scorecard results*
 - *Checklist scores; and*
 - *% attendance of parents/carers of FSM eligible pupils at parents'/carers' evenings*
- *An aggregated, regional dataset showing average scores across categories*

- *Benchmarking tools that schools can use to understand their position relative to other schools in the region*
- *Indicating whether you would like your school's Scorecard to be shared publicly or featured as a case study (Optional- extra consent will be sought where necessary)*

Your school's Scorecard data will be included in aggregated findings only. No individual school will be identified in any reporting unless you have explicitly chosen to share your Scorecard publicly (see below). No personal data (e.g. names, contact information, pupil-level information) is collected. The school name will be visible at the point of submission but will be removed during analysis unless the school has opted into public sharing.

What are the possible benefits of taking part?

It is unlikely that we can promise any specific benefits, however we have developed the Equity Scorecard as a free resource for schools to support them in their work with pupils from under-resourced backgrounds. We hope that this part of the evaluation will mean that:

- *Your school will gain access to regional benchmarking averages, offering insight into trends across similar institutions;*
- *Participation supports the development and refinement of a tool designed to improve equity outcomes and;*
- *Participating schools may opt to share their data publicly, contributing to peer learning across the region and nation.*

What are the possible disadvantages and risks of taking part?

As this is an initial scaled up version of the Scorecard that we have developed, there may be additional time commitments involved for phase 2 participants relative to later users of a refined version of the Scorecard. It is through this pilot that we hope to refine the Scorecard for future use.

Aside from the additional time commitment asked of participants, we do not anticipate that taking part in the research has any foreseeable risks. No school will be identified the aggregated data, or in reporting unless they have chosen to share their data publicly.

What will happen if I don't want to carry on with the study?

Participants can stop taking part in this data sharing at any time without having to give a reason and participants can ask to withdraw and confirm that their data can be destroyed. You may choose not to submit your Scorecard data for benchmarking. If you submit it and later wish to withdraw, you may do so at any time.

How will my information be kept confidential?

The University of Exeter processes personal data for the purposes of carrying out research in the public interest. The University will endeavour to be transparent about its processing of your personal data and this information sheet should provide a clear explanation of this. If you do have any queries about the University's processing of your personal data that cannot be resolved by the research team, further information may be obtained from the University's Data Protection Officer by emailing informationgovernance@exeter.ac.uk, or at <http://www.exeter.ac.uk/ig/>

Storage: All data will be stored securely in line with the University of Exeter's Data Protection Policy and GDPR guidelines. Audio recordings will be stored on encrypted university servers and will be deleted after transcription. Survey data will be stored in an anonymised form, and any personally identifiable information will be removed before analysis.

Data Analysis: The data will be analysed using qualitative and quantitative methods. Audio recordings from interviews will be transcribed, and thematic analysis will be applied. Aggregated survey data will

be analysed to identify trends and patterns in how the Equity Scorecard is being used and its impact on practice.

Confidentiality: Data collected during the study will be treated confidentially. The research team will ensure that all personal data is anonymised or pseudonymised to prevent the identification of individual participants. Any personal information will be used solely for the purposes of the study and in accordance with GDPR.

The data collected during the project will be stored securely and in compliance with the University of Exeter's Data Protection Policy and relevant data protection laws, including GDPR. Both digital and non-personal data storage methods will be utilised to ensure that all research data is stored safely and appropriately.

The data will be stored for 1 year after being returned to schools.

Participants can opt for their contact details to be kept, to be informed about the outcomes of the project or about future research. Your contact details will be kept securely on the University of Exeter's SharePoint during this period. Any news/outcomes of the study will be made available on the South-West Social Mobility Commission website and participants will be informed of where the details will be available.

Will I receive any payment for taking part?

No, participants will not receive any payment for taking part in this research.

What will happen to the results of this study?

We hope to share benchmarks with other participating schools. SWSMC may disseminate the results of this evaluation in a conference and a report. We will make information on the outcomes of the project available to participants at the end of the project and on the South-West Social Mobility Commission website. The aggregated data (presented as regional/national averages) will be available to schools taking part in the research in 'average' form.

Who is organising and funding this study?

*The sponsor for this study is the University of Exeter. The research team is the South-West Social Mobility Commission. You can read more about the Commission here:
<https://southwestsocialmobility.com/>*

Who has reviewed this study?

This project has been reviewed by the Faculty of Humanites and Social Sciences Research Ethics Committee (FHASS REC) at the University of Exeter

Contact for any questions or request regarding your participation in this research

In the event of queries or requests you may contact me using the following contact information. Please email b.r.brooks2@exeter.ac.uk or a.sim@exeter.ac.uk

To contact the Faculty of Humanities and Social Sciences Research Ethics Committee please email fhass-ethics@exeter.ac.uk

You can also contact the University Research Ethics and Governance Team please email cgr-reg@exeter.ac.uk,

Thank you for your interest in this project