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Beyond eligibility for free school meals (eFSM): A review of the need for and uses of data on learner socio-economic disadvantage – Technical annex



Mae'r ddogfen yma hefyd ar gael yn Gymraeg.

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Beyond eligibility for free school meals (eFSM): A review of the need for and uses of data on learner socio-economic disadvantage

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Views expressed in this report are those of the researcher and not necessarily those of the Welsh Government.

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#### About this technical annex

This technical annex has been produced as part of a research project entitled Beyond eligibility for free school meals (eFSM): A review of the need for and uses of data on learner socio-economic disadvantage. It is intended to accompany the main report.

The core aims of the study were to determine the range of needs the Welsh Government (WG) and other stakeholders have regarding learner SED data, including the purposes for which they use it, and to provide a comprehensive understanding of how they currently use eFSM data. It also seeks to gather perspectives on eFSM's limitations and recent challenges, including ways to overcome these, and to explore other forms of data stakeholders are using or feel they would like to access to better meet their needs.

The methods for this research involved two components of primary data collection mainly undertaken between March and August 2024. This consisted of a proforma exercise which received 33 responses including from 13 WG officials and 19 LAs, and a further 39 semi structured interviews (involving 55 participants) with stakeholders across Wales. A full overview of the methodology and its limitations is available within the report.

Included in this technical annex are a series of tables that set out stakeholder requirements for data on socio-economic disadvantage amongst learners. They do so by mapping broad and specific purposes for using SED data to a range of data characteristics that are considered most desirable to different meet stakeholder needs.

#### Information for interpreting tables

To interpret these tables, the following definitions should be considered:

**Data use** refers to the purposes for which stakeholders use data.

**Data characteristics** refer to the different properties of data.

In terms of data characteristics, stakeholders expect data to be high-quality and validated to minimise errors. In addition, there should be transparency regarding the data collection methods and their associated limitations. These baseline features are expected across all stakeholders and the purposes for which they use data; their absence means the data will not be fit for purpose. Given this commonality, they have not been included in the tables.

There is a range of further characteristics that have been identified as important to consider, which vary across both stakeholders and according to the purposes for which they use the data:

- Accessibility and availability, providing data that is easily accessible and available to stakeholders for analysis.
- Understandability, whereby data is well understood by and familiar to stakeholders, thereby supporting user confidence and accurate interpretation.

- **Timeliness**, or how up-to-date or recent the data is, and the extent to which data can reflect the current reality of socio-economic disadvantage.
- **Frequency**, or how often data is available, indicates that data is updated at sufficiently regular intervals to allow stakeholders to compare trends over an appropriate time frame.
- **Stability over time,** in which definitions of relevant concepts and the data-collection approach remain consistent, is necessary to compare longitudinal trends meaningfully.
- **Comparability**, where the data aligns with approaches taken elsewhere and allows for integration and comparison with datasets in other locations.
- Granularity, where data is available at the appropriate level of detail, including by:
  - Data subject, refers to who or what information is recorded in relation to that specified in the column.
  - Geography, refers to the level at which data is available, such as individual, school, neighbourhood (e.g. LSOA), local authority, region or national.
- Aspects and dimensions of SED, relate to different factors associated with the
  multi-dimensional nature of socio-economic disadvantage that stakeholders would
  like data to reflect. This can encompass income, as well as contextual information on
  other factors which play an essential role in educational outcomes.
- **Construct validity,** the extent to which data captures the true nature of the underlying concept or phenomenon it purports to measure; in this case, how it reflects socio-economic disadvantage amongst learners.
- **Consensus**, where stakeholders at all levels within a policy or other area are using a similar approach or data source to evidence comparable phenomena.

# Table 1. Welsh Government requirements for data on learner SED

| Broad use                                | Specific use   | Understandability   | Timeliness   | Frequency<br>(min) | Stability   | Comparability  | Data subject | Geography   | Aspects and dimensions of SED   | Consensus  |
|--|--|---|--|--------------------|---|--|--------------|---|---|--|
| Informing<br>and<br>developing<br>policy | Policy<br>development<br>(inc. National<br>Indicators) | Important: should<br>be well understood<br>to support public<br>engagement;<br>familiar to<br>stakeholders to<br>support confidence | Less<br>important:<br>needed to<br>inform policy<br>development on<br>a 2–5 year cycle | Annual             | Important for<br>evaluating<br>impact over time<br>through trend<br>comparison    | Less important,<br>although useful<br>when<br>benchmarking with<br>other countries | Individual   | National level<br>essential<br>Local authority<br>desirable | High importance on<br>accessing income data<br>derived from proxies,<br>such as eFSM and<br>more directly via DWP<br>and HBAI   | Important,<br>should evidence<br>agreed<br>phenomena for<br>national<br>benchmarking     |
|  |  | in policy decisions   |  |                    |   |  |              |   | Importance of accessing other contextual information, as evident in the use of WIMD and the Census, as well as other composite measures. Some interest, depending on the specific use, as shown by data on the number of learners with ALN, uniform grants, referrals to social services, and household tenure. |  |
| Informing<br>and<br>developing<br>policy | Education<br>budget<br>forecasting                     | Less important,<br>Welsh Gov internally<br>focused  | Important to inform the end of the end-of-the-year budgets                             | Annual             | Less important,<br>reflects grant<br>criteria and trend<br>analysis not<br>needed | Less important,<br>Welsh Gov<br>internal   | Individual   | National level essential  Local authority desirable         | High importance on<br>accessing income data<br>derived from proxies, as<br>in eFSM  | Important: data<br>used should<br>reflect<br>grant/funding<br>criteria                   |
| Informing<br>and<br>developing<br>policy | Policy<br>monitoring                                   | Important,<br>particularly in<br>relation to publishing<br>policy impact  | Important to inform success of and/or refinements to policy.                           | Annual             | Important for trend comparison  | Less important,<br>although useful<br>when<br>benchmarking with<br>other countries | Individual   | National level<br>essential<br>Local authority<br>desirable | High importance on accessing income data derived from proxies, as in eFSM  Importance of accessing other contextual information, as evident in the use of WIMD  | Important,<br>should evidence<br>comparable<br>phenomena for<br>national<br>benchmarking |

| Broad use                                     | Specific use  | Understandability  | Timeliness   | Frequency (min) | Stability                                      | Comparability  | Data subject | Geography                                  | Aspects and dimensions of SED   | Consensus                                |
|---|---|--|--|-----------------|--|----------------|--------------|--|---|--|
| Calculating<br>and<br>distributing<br>funding | Local<br>Government<br>Education<br>Grant<br>(including<br>PDG) | Less important,<br>Welsh Gov internal  | Important to<br>most accurately<br>reflect recent<br>SED needs | Annual          | Less important,<br>no trend<br>analysis needed | Less important | Individual   | Local authority and school level essential | High importance on accessing income data that reflects levels of poverty derived from proxies, as in eFSM or directly from DWP (various income support and benefits). Also, the importance of income data over the longer term rather than a single point in time.  Importance of accessing more contextual information | Less important,<br>Welsh Gov<br>internal |
| Calculating<br>and<br>distributing<br>funding | Schools<br>Essentials<br>Grant (SEG)                            | Important, schools<br>and families must be<br>familiar with and<br>understand; reliant<br>on parental<br>application | Important to<br>most accurately<br>reflect recent<br>SED needs | Annual          | Less important,<br>no trend<br>analysis needed | Less important | Individual   | Local authority level essential            | High importance on accessing income data derived from proxies, such as eFSM or more directly via DWP. Also, the importance of income data over the longer term rather than a single point in time.  | Less important,<br>Welsh Gov<br>internal |
| Calculating<br>and<br>distributing<br>funding | UPFSM Grant   | Important, schools<br>and families must be<br>familiar with and<br>understand; reliant<br>on parental<br>application | Important to<br>most accurately<br>reflect recent<br>SED needs | Annual          | Less important,<br>no trend<br>analysis needed | Less important | Individual   | Local authority level essential            | High importance on accessing income data derived from proxies such as eFSM  Some importance on accessing more contextual information, as evident in their use of WIMD for policyrelated research  | Less important,<br>Welsh Gov<br>internal |

| Broad use                                     | Specific use                                   | Understandability  | Timeliness   | Frequency<br>(min) | Stability  | Comparability  | Data subject | Geography                             | Aspects and dimensions of SED   | Consensus                                |
|---|--|--|--|--------------------|--|--|--------------|---------------------------------------|---|--|
| Calculating<br>and<br>distributing<br>funding | Local<br>Government<br>Settlement              | Less important, Welsh Gov internal, although useful for offering transparency of decision making | Important to<br>most accurately<br>reflect recent<br>SED needs   | Annual             | Less important,<br>no trend<br>analysis needed   | Less important   | Individual   | Local authority level essential       | High importance on accessing data on income data derived from proxies, as in eFSM, and more directly via DWP (e.g. income support and benefits). Also, the importance of longer-term income data rather than a single time point  Importance of accessing other contextual information, as evident in the use of WIMD and Census data (incl. NS-SEC, household composition, qualification levels, and ethnicity, etc.). | Less important,<br>Welsh Gov<br>internal |
| Statistics and monitoring of outcomes         | Producing<br>school<br>statistics and<br>AWCDS | Important to ensure data is analysed, used and communicated appropriately                        | Important to<br>most accurately<br>reflect SED<br>among learners | Annual             | Important to<br>compare the<br>performance<br>trends of cohorts<br>of learners and<br>schools over<br>time | Important for<br>international<br>comparisons<br>(PISA)      | Individual   | School and individual level essential | High importance on accessing data on income data derived from proxies, such as eFSM and more directly from DWP on household income and benefits  Some importance on accessing contextual information, as evident in the use of WIMD for grouping schools  | Important for international comparisons  |
| Statistics and monitoring of outcomes         | Sharing<br>statistics<br>(ADR, PISA,<br>LLWR)  | Important to ensure data is analysed, used and communicated appropriately                        | Important to<br>most accurately<br>reflect SED<br>among learners | Annual             | Very important<br>for longitudinal<br>trend analysis   | Very important to compare with other variables or approaches | Individual   | Individual level<br>essential         | High importance on accessing data on income data derived from proxies, such as eFSM and more directly from DWP on household income and benefits  Some importance on accessing contextual information, as evident in the use of WIMD   | Important for international comparisons  |

| Broad use                             | Specific use          | Understandability   | Timeliness   | Frequency<br>(min) | Stability  | Comparability  | Data subject | Geography                     | Aspects and dimensions of SED  | Consensus  |
|---------------------------------------|-----------------------|---|--|--------------------|--|--|--------------|-------------------------------|--|--|
| Statistics and monitoring of outcomes | Post-16<br>statistics | Important to ensure<br>data is analysed,<br>used and<br>communicated<br>appropriately | Less important,<br>as long as it<br>corresponds<br>with the timing<br>of<br>outcome/perfor<br>mance data | Annual             | Very important<br>for longitudinal<br>trend analysis | Very important to compare with other variables or approaches | Individual   | Individual level<br>essential | High importance on accessing data on income data derived from proxies, such as eFSM and direct information from DWP on householder income and benefits  Some Importance on accessing contextual information, as evident in the use of WIMD | Important for<br>comparison with<br>other home<br>nations and<br>internationally |

# Table 2. Local authorities' requirements for data on learner SED

| Broad use                         | Specific use   | Understandability   | Timeliness  | Frequency<br>(min) | Stability  | Comparability  | Data subject | Geography  | Aspects and dimensions of SED   | Consensus  |
|-----------------------------------|--|---|---|--------------------|--|--|--------------|--|---|--|
| Informing<br>developing<br>policy | Policy<br>development<br>(inc. Poverty<br>strategies and<br>WBFGA<br>assessment) | Important, should<br>be well understood<br>to support public<br>engagement and<br>familiar to<br>stakeholders to<br>support confidence<br>in policy decisions | Less important,<br>needed to<br>inform policy<br>development on<br>a 2–5 year cycle | Annual             | Important for trend comparison   | Important for<br>benchmarking with<br>other local<br>authorities | Individual   | Local authority level essential  LSOA or ward level desirable          | High importance in accessing income data derived from proxies, such as eFSM and more directly from DWP household income and benefits, etc, with a preference for it being tiered by gradients rather than binary  Importance in accessing other contextual information, as evident in the use of WIMD for comparison to different authorities to inform policy intervention, as well as individual examples of use of Acorn/CACI labour market data | Important, LAs<br>should evidence<br>comparable<br>phenomena for<br>national<br>benchmarking |
| Informing<br>developing<br>policy | Education<br>budget<br>forecasting   | Less important,<br>local authority<br>internal  | Important to<br>inform the end<br>of the end-of-<br>the-year<br>budgets             | Annual             | Less important,<br>reflects grant<br>criteria and no<br>trend analysis<br>needed | Less important,<br>local authority<br>internal                   | Individual   | Local authority level<br>essential<br>LSOA or ward level<br>not needed |   | Important: data<br>used should<br>reflect<br>grant/funding<br>criteria                       |

| Broad use                                     | Specific use                         | Understandability   | Timeliness  | Frequency (min) | Stability                                      | Comparability  | Data subject | Geography              | Aspects and dimensions of SED   | Consensus                   |
|---|--------------------------------------|---|---|-----------------|--|--|--------------|------------------------|---|-----------------------------|
| Calculating<br>and<br>distributing<br>funding | Pupil<br>Development<br>Grant (PDG)  | Less important, local authority internal  | Important to<br>most accurately<br>reflect the recent<br>SED need | Annual          | Less important,<br>no trend<br>analysis needed | Less important, local authority internal and nationally set criteria | Individual   | School level essential | High importance in using income data derived from proxies, such as eFSM, and direct data from DWP household income and benefits. Also, the importance of longer-term income data rather than a single time point.  Important in WG using other contextual information, such as WIMD, and a desire for fuel poverty indicators to ensure funding goes to all those in need  Preference for tiered, not binary, information | N/A nationally set criteria |
| Calculating<br>and<br>distributing<br>funding | Schools<br>Essentials<br>Grant (SEG) | Very important,<br>schools and families<br>must understand;<br>reliant on parental<br>application | Important:<br>ideally, a<br>demand-led<br>budget                  | Annual          | Less important,<br>no trend<br>analysis needed | Less important, local authority internal and nationally set criteria | Individual   | School level desirable | High importance on accessing income data from proxies, such as eFSM, and, more directly, from DWP household income and benefits data. Also, the importance of long-term income data rather than a single time point  Importance of greater contextual information to ensure funding goes to all those learners in need  | N/A nationally set criteria |

| Broad use                                     | Specific use                          | Understandability   | Timeliness  | Frequency<br>(min) | Stability                                      | Comparability                                  | Data subject | Geography              | Aspects and dimensions of SED   | Consensus  |
|---|---------------------------------------|---|---|--------------------|--|--|--------------|------------------------|---|--|
| Calculating<br>and<br>distributing<br>funding | Individual<br>Schools<br>Budget (ISB) | Less important, local authority and school internal, although there is a drive for increased transparency on the formula used | Important to<br>most accurately<br>reflect the recent<br>SED need | Annual             | Less important, no trend analysis needed       | Less important, local authority internal       | Individual   | School level essential | High importance on accessing income data derived from proxies, such as eFSM and directly from DWP. Also, the importance of long-term income data rather than a single time point.  Importance of accessing other contextual information, as evident in the use of WIMD indicators, fuel poverty indicators, and, in one instance, household qualifications in funding formulas.  Preference for tiered, not binary, information | Less important, local authority internal                 |
| Calculating<br>and<br>distributing<br>funding | Catering in schools                   | Very important,<br>schools and families<br>must understand;<br>reliant on parental<br>application                             | Important,<br>demand-led<br>budget                                | Weekly/monthly     | Less important,<br>no trend<br>analysis needed | Less important,<br>local authority<br>internal | Individual   | School level essential | High importance in<br>accessing income data<br>derived from proxies,<br>such as eFSM or<br>directly from DWP or<br>HBAI   | Less important,<br>local<br>authority/school<br>internal |

| Broad use                             | Specific use   | Understandability  | Timeliness  | Frequency (min)                           | Stability  | Comparability   | Data subject | Geography                           | Aspects and dimensions of SED  | Consensus  |
|---------------------------------------|--|--|---|---|--|---|--------------|-------------------------------------|--|--|
| Providing targeted support            | Providing<br>targeted<br>support<br>(inc VAP)  | Less important,<br>although<br>transparency of<br>approach is<br>important for<br>stakeholder<br>understanding | Very important to identify learners who may be more likely to be vulnerable or require additional support                 | Annual essential Termly/monthly desirable | Less important,<br>but may be<br>useful for trend<br>analysis  | Less important  | Individual   | School catchment<br>level essential | Low importance of accessing income data derived from proxies, as in eFSM, and a greater value placed on more direct data, such as from DWP. Also, the importance of long-term income data rather than a single time point.  High importance in accessing greater contextual information, including ALN status, attainment, attendance and exclusions, and data relating to parental socio-economic status (NS-SEC) that can be used as part of a composite measure.  | Less important, local authority internal   |
| Statistics and monitoring of outcomes | Monitoring and benchmarking learner outcomes  Note – related to school improvement and the work of schools | Important to ensure data is analysed, used, understood, and communicated appropriately                         | Important to meaningfully compare learner outcomes, ideally captured at multiple points in a year over a sustained period | Annual essential Termly/monthly desirable | Very important to analyse the progress of individual learners through education and compare trends in the performance of cohorts over time | Important for<br>benchmarking with<br>other local<br>authorities and for<br>comparison across<br>schools within a<br>local authority. | Individual   | Individual essential                | High importance in accessing income data derived from proxies, such as eFSM, and in the value of direct data from DWP and HBAI. Also, the importance of long-term income data rather than a single time-point, and a preference for it to be tiered by gradients rather than binary.  Importance of accessing greater contextual information, as evident in 5 LAs' use of WIMD indicators and 2 LAs' use of Acorn/CACI, combining Census and housing data (tenure, size, price) with health and crime indicators | Important for<br>benchmarking<br>with other local<br>authorities and<br>nationally |

| Broad use             | Specific use  | Understandability   | Timeliness  | Frequency<br>(min)                          | Stability   | Comparability  | Data subject | Geography                                       | Aspects and dimensions of SED   | Consensus                                |
|-----------------------|---|---|---|---|---|----------------|--------------|---|---|--|
| School improvement    | Identifying potentially vulnerable learners               | Less important, although transparency of approach is important for stakeholder understanding (regional consortia, schools, governors)                           | Very important to identify learners who may be more likely to be vulnerable or require additional support   | Annual essential Termly / monthly desirable | Some<br>importance<br>may be useful<br>for trend<br>analysis  | Less important | Individual   | School catchment and individual-level essential | Low importance in accessing data on income derived either from proxies such as eFSM or more directly. Also, greater importance is placed on long-term income data rather than a single point in time.  High importance is placed on accessing greater contextual information, as evidenced by the use of WIMD to provide a better overall understanding of disadvantage and needs, including the capture of coastal/rural factors, and by one LA's use of housing benefit data. | Less important, local authority internal |
| School<br>improvement | Designing and delivering local/school-level interventions | Less important, local authority internal, although transparency of approach is important for stakeholder understanding (regional consortia, schools, governors) | Very important to identify cohorts of learners who may be more likely to be vulnerable or require additional support, and ideally captured at multiple points in a year | Annual essential Termly/monthly desirable   | Less important,<br>but may be<br>useful for trend<br>analysis | Less important | Individual   | Individual-level essential                      | Low Importance in accessing income data derived from proxies as in eFSM. Also, greater importance is placed on long-term income data rather than a single point in time.  High Importance in accessing greater contextual information, including ALN status, attainment, attendance, exclusions, and data relating to parental socio-economic status (NS-SEC) that can be used as part of a composite measure.  | Less important, local authority internal |

# Table 3. Schools' requirements for data on learner SED

| Broad use             | Specific use   | Understandability   | Timeliness   | Frequency (min)                                  | Stability  | Comparability  | Data subject | Geography                                    | Aspects and dimensions of SED   | Consensus   |
|-----------------------|--|---|--|--|--|--|--------------|--|---|---|
| School<br>improvement | Monitoring<br>learner<br>outcomes and<br>benchmarking<br>performance | Important to ensure data is analysed, used and communicated appropriately | Important, to coincide with the timing of outcome/performance data                       | Annual essential<br>Termly/<br>monthly desirable | Very important to analyse the progress of individual learners through education and compare the trends of performance of cohorts over time | Important, for<br>benchmarking with<br>other schools<br>(including through<br>AWCDS) | Individual   | School catchment and learner level essential | High importance on accessing income data derived from proxies such as eFSM or more directly. Also, the importance of income data over the longer term rather than a single point in time.  High importance on accessing other contextual information to understand relevant factors in outcomes, as evident in the use of WIMD in the AWCDS and data and information provided by the LAs. | Important, for<br>benchmarking<br>with other<br>schools, school<br>families, local<br>authorities and<br>nationally |
| School<br>improvement | Self-evaluation  | Less important  | Important, to<br>correspond<br>with the timing<br>of outcome/<br>learner<br>outcome data | Annual   | Less<br>important, but<br>may be useful<br>for trend<br>analysis   | Less important   | Individual   | School catchment<br>level essential          | High importance on accessing income data derived from proxies such as eFSM and, more directly, DWP and HBAI  High importance on accessing other contextual information to understand relevant factors in school and learner outcomes, as evident in the use of WIMD in the AWCDS and other information  | Less important,<br>local<br>authority/school<br>internal  |

| Broad use             | Specific use  | Understandability   | Timeliness   | Frequency (min)                            | Stability  | Comparability  | Data subject | Geography                                      | Aspects and dimensions of SED  | Consensus   |
|-----------------------|---|---|--|--|--|----------------|--------------|--|--|---|
| School improvement    | Identifying potentially vulnerable learners         | Less important, but needs to be understandable enough to be readily usable            | Important to most accurately reflect recent SED needs            | Annual essential Termly/ monthly desirable | Less<br>important  | Less important | Individual   | School catchment and learner-level essential   | Importance of accessing income data derived from proxies, such as eFSM and, more directly, information on long-term income data, rather than a single point in time  High importance on accessing other contextual information for better overall reflection of disadvantage covering factors and learners not captured by current measures of income. This is evident in the use of WIMD with its multiple indicators, as well as in other available information, such as food bank use, requests for school uniforms, housing tenure and school moves, looked-after children, and anecdotal insights—some of which indicate that schools are forming composite measures. | Less important, local authority/school internal, with approaches reflecting the local context |
| School<br>improvement | Designing and delivering school-level interventions | Less important, but<br>needs to be<br>comprehensive<br>enough to be readily<br>usable | Important to<br>most<br>accurately<br>reflect recent<br>SED need | Annual essential Termly/monthly desirable  | Less<br>important, but<br>may be useful<br>for trend<br>analysis | Less important | Individual   | School catchment or<br>learner-level essential | Importance of accessing income data derived from proxies, such as eFSM and, more directly, DWP and HBAI.  Importance of accessing other contextual information (as in the row above)   | Less important,<br>local<br>authority/school<br>internal                                      |

# Table 4. Other stakeholders' requirements for data on learner SED

| Stakeholder                              | Specific use                                     | Understandability   | Timeliness  | Frequency<br>(min) | Stability  | Comparability  | Data subject | Geography   | Aspects and dimensions of SED  | Consensus   |
|--|--|---|---|--------------------|--|--|--------------|---|--|---|
| Children's<br>Commissione<br>r for Wales | Policy and advocacy                              | Important: should<br>be familiar to<br>stakeholders to<br>support advocacy<br>work                      | Less important,<br>needed to inform<br>advocacy work<br>to align with<br>Welsh<br>Government<br>policy cycles | Ànnúal             | Important for<br>the analysis of<br>policy impact<br>over time       | Important for drawing comparisons with other nations | Any          | National level essential  Local authority desirable | High importance on accessing data and on measures relating to income poverty.  Importance of other contextual data, such as housing and housing costs, foodbank access, and free school transport. Other non-SED-specific factors mentioned relating to children missing in education, children electively home educated, disability, etc.                               | Important for<br>aligning policy<br>with other<br>stakeholder<br>organisations<br>(e.g., NESTA,<br>Bevan<br>Foundation,<br>etc.). |
| Careers<br>Wales                         | Providing<br>targeted<br>support to<br>learners  | Less important  | Important to<br>most accurately<br>reflect recent<br>SED need   | Annual             | Less important   | Less important                                       | Individual   | School-level essential                              | High importance on income-related measures, which can be triangulated alongside other metrics relating to disadvantage, such as ALN, ESOL, disability, carer or care experience, etc.  | Less important  |
| Estyn                                    | Providing contextual information for Inspections | Important for informing conversations with school leaders and transparency in the context of assessment | Important to most accurately reflect recent SED need  | Annual             | Important for informing trend analysis of the school profile/context | Less important                                       | Individual   | School-level essential                              | Importance of incomerelated measures, as derived from proxies such as eFSM, including over the longer term rather than just a single point in time, as seen in the use of 'smoothed' data.  High importance is placed on other contextual information, including rural poverty, to provide an accurate reflection of school demographics and factors affecting learning. | Less important,<br>Estyn internal   |

| Stakeholder             | Specific use   | Understandability | Timeliness  | Frequency (min) | Stability  | Comparability  | Data subject | Geography                            | Aspects and dimensions of SED  | Consensus  |
|-------------------------|--|-------------------|---|-----------------|--|--|--------------|--------------------------------------|--|--|
| Estyn                   | Monitoring the performance of learners (to assess whether a school is meeting needs) | Less important    | Important to<br>most accurately<br>reflect recent<br>SED need | Annual          | Important for<br>benchmarking<br>performance at<br>Key Stage 4 and<br>for trend<br>comparison over<br>time         | Less important   | Individual   | School-level essential               | Importance of income-<br>related measures, as<br>derived from proxies<br>such as eFSM,<br>including over the<br>longer term, not just at a<br>single point in time, as<br>seen in the use of<br>'smoothed' data.   | Less important,<br>Estyn internal                  |
|                         |  |                   |   |                 |  |  |              |                                      | High importance is placed on other contextual information across multiple dimensions of SED, including rural poverty, to contextualise behaviour, attendance, and performance.   |  |
| Estyn                   | Benchmarking<br>the<br>performance<br>of schools<br>across Wales                     | Less important    | Important to<br>most accurately<br>reflect recent<br>SED need | Annual          | Less important,<br>only<br>benchmarking<br>performance at<br>Key Stage 4   | Very important<br>for performing<br>regression<br>analysis across<br>schools | Individual   | School-level essential               | Importance of income- related measures derived from proxies, such as eFSM, over the longer term, not just at a single point in time, as seen in the use of 'smoothed' data.  High importance on other contextual information on multiple dimensions of SED, including rural poverty. | Less important,<br>Estyn internal                  |
| Qualifications<br>Wales | Qualifications<br>Regulation   | Less important    | Less important<br>to inform the<br>reform as<br>required      | Annual          | Very important<br>for trend<br>comparison and<br>the maintenance<br>of standards of<br>GCSE and A-<br>level grades | Important for performing comparisons across all qualifications centres       | Individual   | Qualification centre level essential | Importance of income- related measures such as eFSM, and interest in income data over the longer term.  Importance of accessing other contextual information, as evidenced by the use of WIMD, which provides deeper insight into gradients of disadvantage.                         | Less important,<br>Qualification<br>Wales internal |

| Stakeholder             | Specific use  | Understandability  | Timeliness   | Frequency (min) | Stability  | Comparability  | Data subject   | Geography                               | Aspects and dimensions of SED  | Consensus  |
|-------------------------|---|--|--|-----------------|--|--|--|---|--|--|
| Qualifications<br>Wales | Qualification<br>Reform<br>(equality<br>assessments)                            | Less important   | Less important<br>to inform the<br>reform as<br>required         | Annual          | Important for performing trend comparison and analysis over time                             | Important for comparisons across all qualifications centres                            | Individual   | Qualification centre<br>level essential | Importance of incomerelated measures, such as eFSM and triangulation with broader equality data. Also, there is an interest in income data over the longer term.  Importance of accessing other contextual information, as evidenced by the use of WIMD, which provides deeper insight into gradients of disadvantage. | Important to<br>align with the<br>approaches<br>taken by<br>qualification<br>centres |
| UCAS                    | Higher<br>Education<br>Admissions<br>(via data<br>sharing with<br>institutions) | Important, should<br>be familiar to higher<br>education providers,<br>schools and learners | Important:<br>should inform<br>the annual<br>admissions<br>cycle | Annual          | Less important,<br>but<br>consideration of<br>discontinuity for<br>mature learners<br>needed | Important for providing comparative data with other nations and international learners | Individual<br>(although<br>some HEIs<br>use area-level<br>data for<br>contextual<br>admissions | National level                          | High importance is placed on incomerelated measures, such as proxies like eFSM.  Importance of accessing other contextual information and metrics related to disadvantage, such as parenting or caring responsibilities, military family care experience, and disability. Also, evident in the use of WIMD.            | Less important:<br>institutions use<br>data for their own<br>policies                |
| UCAS                    | Fair Access<br>programmes<br>and<br>interventions                               | Important: should<br>be familiar to higher<br>education providers,<br>schools and learners | Important to<br>most accurately<br>reflect recent<br>SED need    | Annual          | Less important   | Less important   | Individual   | National level                          | High importance is placed on incomerelated measures, such as proxies like eFSM.  Importance of accessing other contextual information and metrics related to disadvantage, such as parenting or caring responsibilities, military family care experience, and disability. Also, the evident use of WIMD.               | Less important,<br>UCAS internal   |