

The Cost of Schooling

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BMRB Social Research

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The views expressed in this report are the authors' and do not necessarily reflect those of the Department for Education and Skills.

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Tim Brunwin, Sam Clemens, Gemma Deakin and Ed Mortimer
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Summary of main findings

This report summarises the key findings from the Costs of Schooling survey, carried out by BMRB International on behalf of the Department for Education and Skills.

The project involved three components: a telephone survey of parents/carers; a postal/web based self-completion survey of state schools; and a face-to-face survey of school pupils themselves (using BMRB's Access to Youth omnibus survey).

Both the survey of parents/carers and the schools survey involved establishing what extra costs were asked of parents by schools and what the actual value of these additional costs amounted to. The extra costs examined included school uniform, sports kit, class materials, contributions to school fund, charity events, school trips, school photos, school meals and transport. Attitudes towards being asked to pay for these items were also examined in the parents/carers survey. The survey of schoolchildren examined the role children play in "gate-keeping" requests for contributions for school trips, charity events, etc.

Interviews were carried out with 1,496 parents/carers between February and April 2004. Over the same period, 280 schools took part in the postal/internet survey. A total of 1,066 face-to-face interviews with schoolchildren were conducted between April and June 2004.

- According to data from the parents/carers survey, based on the costs paid by ALL parents in 2003, the total annual average amount spent on costs associated with sending children to state schools was £736.22 per child (*section 14*).
- The total annual average costs varied in terms of the type of school attended. For primary pupils the average annual total was £563.15 per child, compared to £948.11 for secondary pupils (*section 14*).
- The largest individual area of cost of sending a child to state school was meals during school time. On average parents/carers spent £1.66 per day on meals for children – including school meals, packed lunches and meals at home (during school day). The combined annual average total spent on school meals was £316.20. (*section 9.3*).
- According to the survey of parents, the average amount spent on school uniform in 2003 was £157.50. This figure is based on all parents/carers whose child required school uniform. The amount spent on uniform varied according to gender and type of school. For male primary school pupils the average spent was £132.02 compared to £138.28 for female pupils. For male secondary school pupils the average spent was £191.32 compared to £175.33 for female pupils (*section 3.1.3*).

- According to the survey of parents/carers, the average amount spent on PE kit in 2003 was £78.47. This figure is based on all parents/carers whose child needed a PE kit. The amount spent on PE kit varied according to gender and type of school. For male primary school pupils the average spent was £52.53 compared to £44.78 for female pupils. For male secondary school pupils the average spent was £127.12 compared to £92.39 for female pupils (*section 3.2.4*).
- Looking at the cost of school clothing (uniform and PE kit) as a whole, the average cost to parents/carers (based on those whose child needed school uniform or PE kit) was £224.69 per child¹. Again the total costs varied according to gender and type of school. For male primary school pupils the average spent was £171.48 compared to £172.19 for female pupils. For male secondary school pupils the average spent was £312.85 compared to £261.08 for female pupils.
- The costs to parents of a school trip in 2003 varied in terms of type of trip (whether residential or day) and in terms of the type of school. For parents of primary schoolchildren, the average cost of a day trip was £8.32 and for a residential trip £119.60. For parents of secondary schoolchildren, the average cost of a day trip was £19.38 and a residential trip was £186.72 (*section 4.2.3*).
- Parents/carers were asked whether they had to contribute to class materials for their child for six different lessons (music, cookery, IT, art, design and technology and sewing). Overall three in five parents/carers (61 per cent) were asked to contribute to class materials on behalf of their child. There was clear difference between primary and secondary schools with this. Less than half (47 per cent) of parents/carers of primary schoolchildren had to contribute to class materials compared to 79 per cent of parents/carers of secondary school pupils (*section 5.1.1*). The costs of the contribution towards class materials were then asked for the six subject areas. Music lessons had the highest associated average costs (£70.49). Cookery materials (£39.34) and IT materials (£20.25) were next followed by materials for Art (£14.32), Design and Technology (£13.19) and Sewing (£12.54) (*section 5.1.2*).
- Over a third (34 per cent) of parents were asked to contribute to the school fund. The average amount contributed over the year was £25.32. In contrast 38 per cent of the schools surveyed said they asked parents for a contribution to the school fund. The

¹ This cost is based on parents/carers whose child required any form of school clothing – either uniform or PE kit or both. The overall average amount spent on school clothing is not simply calculated by adding together the average cost of school uniform and PE kit as some parents/carers may need to buy items of uniform but no PE kit or vice versa.

average amount asked from parents by schools was higher at £37.02 (however there was a low number of schools answering this question) (*section 8.2/8.5*).

- The average cost paid for school photographs by parents in 2003 was £15.71. The average cost paid by parents for a typical charity event was £3.22 (the median was lower at £1). The average annual parental contribution was £11.81 for activities such as school raffles, parties, jumble sales etc. (the median amount was lower at £6) (*section 11*).
- Over one in five parents/carers (21 per cent) said their child used public transport or taxis to and from school. Of these parents/carers, 64 per cent said they paid the costs themselves. The average cost of travel to school paid by parents whose children used public transport or taxis was £7.29 a week (*section 10*).
- In terms of comparison between the schools and parents/carers survey, the costs associated with items of uniform, PE kit and class materials drawn from the survey of schools were consistently lower than those given by parents/carers. However the relatively low number of schools who responded to the survey should be borne in mind
- Twenty-nine per cent of parents/carers said they were very happy with the costs of schooling. 61 per cent described themselves as quite happy. Nine per cent of parents/carers were not happy (including one per cent who said they were not at all happy). Happiness with the costs of schooling was clearly related to the ability to pay. Those in the higher household income brackets were more likely to be quite or very happy with the costs compared to those with a lower annual household income (*section 12.1.5*).
- Overall 18 per cent of respondents said they found it very easy to meet the costs associated with sending their child to state school. Over half (53 per cent) said they found it quite easy. In contrast 22 per cent said they found it quite difficult and five per cent said they found it very difficult to meet the costs expected of them. There were clear differences between household income brackets. Unsurprisingly respondents with a higher annual household income were more likely to say they found it easy to meet the costs. In contrast those on lower household incomes were more likely to say meeting the costs was difficult. Looking at the bottom two income brackets combined, over half (55 per cent) of those with a household income of under £15,000 felt it was quite difficult or very difficult to meet the costs discussed. Of the lowest household income bracket (less than £10,000pa), the proportion who found meeting the costs difficult was 62 per cent, including 14 per cent who said they found it very difficult (*section 12.2*).
- Statistical analysis was used to establish the most important factors influencing overall happiness with the costs of schooling. The most influential factor was how easy

parents/carers found it to meet the costs. Happiness with the costs of school trips was the second most influential factor, followed by happiness with the costs of school uniform (*section 12.3*).

- Nearly two thirds (64 per cent) of the young people interviewed said they *always* passed on letters from their school requesting financial contributions and a further 26 per cent said they did so *most of the time*. However eight per cent said they passed on letters such as these *not very often* or *never*. In terms of the reasons why letters are not always passed on, simply forgetting was by far the most common reason (68 per cent), followed by the respondent not wanting to take part in the activity or go on the trip in question (29 per cent). However four per cent of children said that one of the reasons for them not always passing requests on was thinking that their parents/carers could not afford to pay. This was clearly influenced by household income - eight per cent of children from families with an income less than £15,000 per year said that thinking their parents/carers could not afford to pay was a reason they did not always pass requests for parental contributions on, compared to only one per cent of children from families with an income of over £15,000 (*section 13*).

The costs involved with schooling vary considerably between primary and secondary schools and (to some extent) between boys and girls.

The costs associated with items of uniform, PE kit and class materials drawn from the survey of schools were generally lower than those given by parents/carers in their survey. It is to be expected that costs given by parents/carers would be more accurate than those given by schools but the consistent difference is an interesting finding perhaps worthy of further investigation.

The survey of parents/carers has shown that ability to meet these costs and happiness with the different areas of expense vary with socio-economic factors such as household income and social grade, as well as other factors such as eligibility for free school meals.

The survey of children revealed that a small minority (particularly from low income families) did not pass on all requests for financial contributions from the school to their parents because of a fear their parents cannot afford it.

1 Introduction

1.1 Background to the study

Although a state-school education is nominally free, there are a number of costs to parents/carers associated with a child's schooling that can have a significant impact on family budgets. Examples include school uniforms, sports kit and school trips. In October 2003, the Department for Education and Skills commissioned BMRB Social Research to carry out a research project to investigate the costs associated with sending children to state school.

Previous research suggested that while primary and secondary state education is free of charge, the everyday cost to parents/carers of sending a child to school is significant, with increased costs when children enter secondary education and higher costs for girls than for boys. Financial assistance from local authorities has been reported as declining in the past decade, and some organisations have expressed concern about the possible exclusion of children from education if they do not have the correct uniform (more information on previous research is contained in the literature review section).

1.2 Aims of the research

In light of these concerns about the financial burden on the families of school children and the possible impact on the education of those children, the Department for Education and Skills commissioned this study to investigate and assess the costs associated with education:

- What are the additional costs to parents when sending their children to school (eg uniforms, sports equipment, books, excursions etc)
- What voluntary contributions are parent/carers asked for by schools
- What arrangements do schools have for asking for contributions? Do the schools consult with parents?
- What happens if parent/carers are unable to pay?

- What role do pupils play (if any) in mediating what parents pay or know about?
- How do costs vary across different types of schools and across year groups?

A wide range of items are included in the costs associated with schooling. Part of the project involved identifying as many of these as possible, with the aim of developing a near-comprehensive list that could be used to assess all of the costs that might be incurred by a family. Furthermore, it is important to distinguish between costs that are compulsory and those that are voluntary, and also to investigate what parents and guardians *believe* to be compulsory items of expenditure; although a school might say that an item of uniform, for example, is recommended rather than compulsory, parents/carers might have a different perception. These issues meant that any thorough investigation of the additional costs associated with a free state education would need to involve data collection with both parents/carers and schools.

An additional aim of the research was to investigate the extent to which children might be acting as “gatekeepers” to school requests for money. This required a survey of schoolchildren themselves.

1.3 Literature review

The objective of this literature review was to provide a context for the development of the data collection instruments for this study. The literature in this review consists largely of small-scale and exploratory studies carried out by non-government and not-for-profit agencies that highlight and introduce some of the key issues that we intend to explore further. The published reports from these studies were either provided for us by the DfES or obtained from internet searches and contact with relevant organisations.

1.3.1 Methodology of the main studies

School Sums (2003)

Norwich Union surveyed a representative sample of 500 parents. Responses were received from 250 parents who had their eldest child at secondary school and 250 who had their eldest child at primary school. This was the child they were questioned about. One hundred parents were interviewed in each of the following five locations: Greater London, Birmingham, Manchester, Cardiff and Glasgow.

Uniform Failure (2001)

National Association of Citizens Advice Bureaux (NACAB) received completed questionnaires from local Citizen Advice Bureaux (CABx) between January and June 2000. Together these questionnaires collected information on the school uniform grant schemes available in 125 of the 172 Local Education Authorities (LEAs) in England and Wales. A follow-up survey was conducted in 2002 involving all 172 LEAs to assess how far provision of LEA grants had changed since the initial report was published.

The Costs of Education: A Local Study (2003)

Child Poverty Action Group (CPAG), Oxford and District Branch sent out 300 questionnaires to a sample of parents with children who attend schools in Oxford. Eighty-four parents responded which made a response rate of 28 per cent. In addition to this, five in-depth interviews were carried out by telephone or in person.

1.3.2 Findings from previous surveys

The School Sums survey (2002) conducted on behalf of Norwich Union found that parents paid nearly £10000 towards the 11 years their child was in state education. Of the regions surveyed, parents in Greater London had the highest spending per child (£1058 per year), followed by Birmingham (£919). Manchester had the lowest additional spending (£827). The survey identified a number of key items that contributed to the additional costs of state education including clothes, books, school trips, lunches, transport, sports kit and after school clubs. Average spending, across all regions, on clothes and shoes specifically for school was £178, while spending on school lunches averaged £324 annually or £9 per week. Transport to school was the next highest expenditure costing £3 each week, which amounted to £108 per school year. School trips were the next most significant expense at £84 per year, followed by spending on sports kit (£57), after school clubs (£45) and books (£31). Total spending per year for primary schoolchildren averaged £799 compared to £968 for secondary schoolchildren. Annual spending on girls (£876) was found to be higher than spending on boys (£855). This survey asked respondents to give the cost and frequency of spending on a range of school items each year. This figure was then multiplied by 11 to calculate the total spending for their child's entire school life.

Sue Middleton (1997) reported that trips, books and extra lessons alone cost on average £6 each week for parents of secondary schoolchildren. CPAG (2003) noted that uniforms, equipment for classes and school trips were particularly important and seen as essential for shared school life and for establishing peer status.

Though none of the pupils at the schools surveyed had formal uniform requirements CPAG found that most respondents spent between £25 and £40 on school shoes and spent less than £15 on PE kits. Parents of older children also reported having to buy football kit, rugby kit, aprons and school bags. One respondent noted that at the younger child's school there were 'never-ending requests' for money for trips and workshops as well as for school photographs which were accompanied by pressure from the children to buy them.

NACAB (2001) reported that a winter coat was also an expensive, but essential item for school. The study also found that one school listed a locker deposit as an additional cost. The use of specialist suppliers by some schools for uniforms generated particularly high costs. NACAB highlighted one school where the specialist supplier charged up to £45 for a blazer.

Voluntary contributions

CPAG (2003) reported that although policies prevented schools from demanding money for excursions that take place during school time, they could request voluntary contributions, thereby giving parents the option not to pay. Despite this, many parents felt pressurised to make payments as they were under the impression that without these contributions the trips would be cancelled. Even when parents expressed a difficulty in covering the cost of school trips most stated that their child 'always goes'. Residential trips occurring outside school hours, for which schools could require payment, often totalled over £100. CPAG found that for these trips parents appreciated advance notice and the opportunity to pay by instalments.

What happens when parents are unable to pay

NACAB explored the means of assistance available to parents to help with the cost of school uniforms. Some local authorities operated a school uniform grant scheme, though NACAB regarded many of these schemes as inadequate. NACAB calculated that the average grant available for the purchase of a uniform for a child entering secondary school was £49. NACAB noted that between 1990 and 2000 there had been a decline in real terms of the assistance available from LEAs. Twenty-nine per cent of LEAs had no grant scheme at all and 39 per cent offered help to primary aged children as well as secondary schoolchildren. Twenty-six per cent of LEAs offered financial assistance towards uniforms for secondary schoolchildren only. A quarter of schemes required the family to be in receipt of Income Support or Job Seekers Allowance to qualify for assistance. The purchase of PE kits and blazers were exempt under some grant schemes. Some local authorities (6 per cent) only offered assistance to families deemed to be in 'exceptional hardship' as a result of losing clothes in a fire or flood, or to those fleeing domestic

violence. NACAB also noted regional variation in the provision of grants by LEAs. Whereas 90 per cent of authorities in the East of England and 80 per cent in the North West offered grants, only 22 per cent in the East Midlands and 26 per cent in the South East did. Furthermore the follow-up survey conducted in 2002 with all LEAs in England and Wales revealed that provision of assistance had declined since the previous survey.

Assistance may also be available from schools themselves. NACAB found that some schools managed a hardship fund while others operated a second hand clothing stall. Other possible sources of financial assistance include the Social Fund, but this excludes the purchase of distinctive items of clothing; a grant from a charitable trust like the Family Welfare Association or a local charity. CAB offered assistance to make applications on behalf the claimant.

In the CPAG survey, 12 per cent of the sample knew that they qualified for free school meals. A quarter of the respondents who did not qualify for free school meals reported a difficulty in meeting the costs of school meals. With regard to additional costs in general CPAG found that where parents were struggling to meet costs some were reluctant to seek help for fear it would stigmatise their child. Some saw asking for assistance as a source of shame. Lone parents and those with more than one child were more likely to face hardship. Sue Middleton (1997) estimated that one in twenty mothers in the UK went without items for themselves, mainly food, clothes and shoes, in order to meet the needs of their child, though this finding is not exclusively for the cost of schooling.

Consequences of failure to meet costs

CPAG suggest that costs associated with 'free' education created problems for children from low income families. One in five respondents stated that their child had gone without an item of school clothing at some stage because they could not meet the cost. CPAG reported that when children are unable to participate fully in school life they risk social exclusion, while wearing the 'right' clothing was seen to shield against bullying. NACAB report that schools with stricter dress codes state in their policy that pupils wearing an incomplete uniform may be prevented from attending lessons. This could consequently have a detrimental affect on the education of children from low income backgrounds. NACAB propose that schools should accept financial hardship as an acceptable reason for failure to comply with uniform policy, especially when no assistance is available.

Children acting as gatekeepers

The CPAG survey referred to findings that suggest some children act as gatekeepers by not informing parents of upcoming excursions because of their perceived financial hardship.

Most expensive times

NACAB found that the most expensive time with regard to purchasing school uniforms is the start of secondary school, followed by the start of primary school. NACAB estimated that the spending per child at this period ranges between £105 and £274. In many cases grant availability is in accordance with these trends, with the highest grant available at this transition being £142.58 in Merthyr Tydfil. For some LEAs grants are only available at this time.

Summary

As these previous surveys show, there appears to be a large range of costs associated with a system of (supposedly) free education. There also exists a range of different abilities to meet these costs and wide variation in the assistance available across different Local Education Authorities (LEAs) for parents who struggle to meet the costs of essential items. The studies conducted so far have proved useful in setting the context for examining the costs associated with schooling in the UK. However much of this previous research (with the notable exception of NACAB's census of LEA assistance available to purchase uniforms) has been very much exploratory in nature, usually involving small-scale or local studies. These studies have highlighted the range of items that parents are expected to purchase. This survey aims to build on these findings and measure these costs and their effects on parents across the entire country.

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1.4 Overview of the approach

A multi-faceted approach was agreed with the Department. As a starting point, the Research Team needed to identify the fullest possible range of costs from the perspectives of both parents/carers and schools. In preparing this list, we carried out a review of recent

literature on the subject and carried out seven qualitative interviews with representatives of schools (three primary and four secondary) and the same number with parents/carers (split between parents/carers of children attending primary and secondary schools).

Following this, it was decided that the parent's interviews should focus on one child only. It had already been agreed with the Department that it would be appropriate to reimburse schools for their time in completing the questionnaire as reimbursement of teacher time. Following the development interviews, it was decided to offer £30 for primary schools and £50 for secondary schools, reflecting the bigger task required of secondary schools. This was in addition to the decision additionally to run the postal survey of schools as a web-based electronic completion version to try and encourage the greatest possible response rate.

Costs were identified across a range of areas: uniform (compulsory and optional); PE kit; school trips (curriculum and non-curriculum); equipment and materials for specific subjects; contributions towards school fund (legally schools are allowed only to ask for contributions); contributions for charity events; school photographs; school meals; transport to and from school and after-school activities; charges for swimming or music lessons, etc. Given the huge range of costs, it was necessary to focus both the parent's and school's questionnaires on the most important items and to follow up in detail only some of the costs mentioned.

As mentioned above, the survey of schools was carried out using a postal questionnaire (12 pages) with an option to complete the form on-line. Additionally there was a reminder wave and finally a telephone chase to encourage completion. The schools were selected using a stratified random sample from EduBase, using a specification agreed by BMRB and the Department. EduBase is a register of all educational establishments in England and Wales, maintained by the Department for Education and Skills. It allows both the general public and government officials to access up to date information. To ensure accuracy, the information is provided by a range of suppliers, from the establishments themselves to Local Education Authorities and specialist agencies.

The survey of parents/carers was carried out using a random-digit dialling telephone survey. Interviewers screened to ensure that the respondent had a child aged five to 16 in state education and that s/he was the person best able to discuss the costs associated with a child's education. If there was more than one such child, one was selected at random using the most-recent-birthday rule.

The *Access to Youth Omnibus* survey was carried out using a small number of questions asked of children aged 10 to 16 in state education. This was to try to assess how often they passed on school requests for money to their parents/carers; if they don't, why; and their perception of their family's ability to pay for the things that were requested.

1.5 Timing of fieldwork

Development stage (November 2003)

As part of the development stage of the project seven cognitive interviews were carried out with parents of children attending state school in November 2003 (three with children at primary school and four with children from secondary schools). Seven interviews with school teachers (three primary and four secondary) were also carried out at the same time.

Parents/carers telephone survey (February – April 2004)

The main stage telephone survey of parents was carried out at BMRB's telephone centre in Ealing between 9th February and 12th April. The pilot version of the survey – to test the questionnaire - was conducted on the 28th January, also at the telephone centre in Ealing.

Schools – Postal and internet survey (February – April 2004)

The fieldwork period for the schools stage of the project ran from the 9th February to the 5th April 2004. This included a telephone chase of non respondents carried out 25th-31st March.

Pupils - Access to Youth Omnibus (April – June 2004)

Questions were asked as part of BMRB's weekly Access to Youth Face-to-Face Omnibus survey between the 1st April and 2nd June 2004.

1.6 Notes on reading the report

The percentages in the report do not always add up to 100 per cent. In some cases this is due to respondents giving more than one answer to the question, but on questions where only one answer is allowed this is due to a small proportion of respondents replying 'don't know'/'not applicable', not responding to the question, or to computer rounding.

The areas of expense for parents/carers associated with sending their children to state schools are governed by statutory legislation and guidelines and these should be borne in mind when reading the report. These guidelines are set out in full in Appendix F.

2 Sample profile

2.1 Parents/carers - final sample profile

A breakdown of the final sample profile of the parents/carers survey (1496 interviews) is shown below.

Table 2.1: Profile of respondents

Base: All Respondents (1496)

	%
Type of School	
Primary	55
Secondary	45
Eligibility for free school meals	
Yes (eligible)	14
No (not eligible)	85
Don't know	1
Social grade of respondent¹	
A	4
B	16
C1	33
C2	22
D	12
E	10
Don't know/refused	3
Annual household income	
Less than £,3000	3
£3,000 - £5,999	5
£6,000 - £9,999	7
£10,000 - £14,999	11
£15,000 - £24,999	19
£25,000 - £34,999	19
£35,000 - £49,999	14
£50,000 or more	10
Don't know/refused	12
Ethnicity of respondent	
White	88
Black	4
Asian	5
Mixed	2
Other	1

¹ Social Grade Classification as follows : A - Upper middle class: Higher managerial administrative or professional occupations B - Middle class: Intermediate managerial administrative or professional people. C1- Lower middle class: Supervisory or clerical and junior managerial administrative or professional occupations. C2- Skilled working class: Skilled manual workers. D - Working class: Semi and unskilled manual workers. E - Those at lowest levels of subsistence. All those entirely dependent on the State long term through sickness, unemployment, old age or other reasons. Casual workers and those without a regular income.

Schools – final sample profile

A breakdown of the final sample profile of the schools survey is shown below. The data from the Schools survey provided have been weighted in terms of urban/rural and type of funding to reflect the overall profile of both primary and secondary schools. The actual achieved percentage is shown in brackets.

Table 2.2: Profile of respondents

Base: All Schools (280)

	Primary (n=196) %	Secondary (n=84) %
Type of Funding		
Community	62 (55)	65 (73)
Foundation	2 (3)	15 (14)
Voluntary aided	21 (23)	16 (7)
Voluntary controlled	15 (20)	4 (6)
Location		
Urban LEA	63 (40)	70 (55)
Rural LEA	37 (60)	30 (45)
Number of pupils		
>100	27	
101-200	25	1
201-300	28	1
301-500	18	12
501-1000	2	43
1000+		43

2.2 Access to Youth survey - final sample profile

Table 2.3: Profile of respondents

Base: All Respondents (1191)

	%
Gender	
Male	50
Female	50
Age	
10-11	31
12-13	31
14-15	21
16	17
Social grade	
AB	13
C1	28
C2	27
D	17
E	16
Annual household income	
Less than £,3000	3
£3,000 - £5,999	6
£6,000 - £9,999	7
£10,000 - £14,999	9
£15,000 - £24,999	13
£25,000 - £34,999	11
£35,000 - £49,999	8
£50,000 or more	5
Don't know/refused	38

3 Uniform and PE kit

The issue of uniform and PE kit costs is one of considerable importance in assessing the overall costs of schooling to parents/carers in England. Uniform, after school meals, is the biggest single contributing expense for most parents/carers involved in sending their child to state school.

Parents/carers and schools included in the survey were asked a series of questions about school uniform, including whether a uniform was required at the school, which items made up the uniform and their estimate of the cost of each item. Given schools were perhaps less likely to know the exact costs involved they were also asked whether the price given was an estimate or exact.

3.1 Uniform requirements

Parents/carers were first asked whether their child's school required pupils to wear a school uniform. Nearly all parents/carers (95 per cent) said their child's school had a uniform of some description.

Parents/carers with children at primary school were slightly less likely to say their child needed a uniform than those at secondary school (93 per cent v 98 per cent).

Almost all primary (99 per cent) and secondary (99 per cent) schools included in the survey said they required a uniform of some description to be worn by pupils. There were no differences in term of the different types of schools.

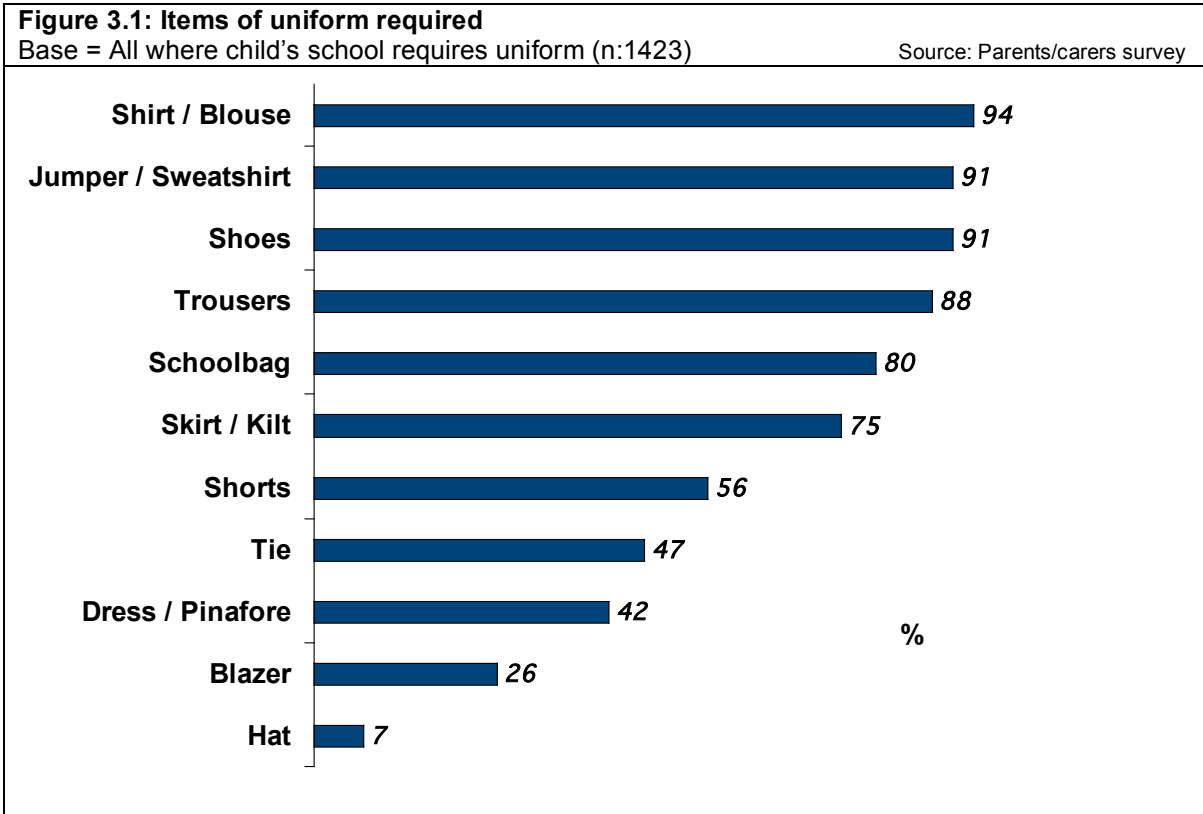
3.1.1 What uniform items are required?

3.1.1.1 *Parents/carers survey*

Parents/carers were then asked what items their child's school uniform consisted of. A list of possible items was then read out – filtered on the child's gender – and parents/carers asked to confirm which items were included in their child's uniform.

The chart below shows each item of uniform and the percentage saying the item was included in their child's school uniform. Please note that the skirt and dress figures are based on female children only and shorts based on male children only.

Findings from the qualitative interviews with parents/carers (conducted as part of the development stage of the project) suggested items such as bags (whilst not strictly part of most schools uniform) were considered a necessary expense for parents/carers and were therefore included in the list used.



Almost every child requiring a school uniform needed a jumper or sweatshirt (91 per cent), a pair of trousers (88 per cent) a blouse or shirt (92 per cent) and a pair of shoes (91 per cent) as part of the uniform.

There was some variation between primary and secondary schoolchildren in terms of the make up of school uniform.

Primary schoolchildren were more likely to need a skirt or kilt (female pupils only - 40% v 32%), a dress or pinafore (33% v 5%) and a jumper or sweatshirt (98% v 83%) as part of their school uniform compared to pupils at secondary school who were more likely to need a school tie (70% v 26%) and a blazer (48% v 8%) compared to their counterparts at primary school.

3.1.1.2 Schools survey

Schools were also asked to record which items of clothing were included in their uniform. They were also asked to state whether the item of clothing was required or optional. A slightly different list was used for the schools questionnaire, enabling items such as a specific type of coat, socks, scarf and badges to be included (where time constraints meant they could not be part of the parents/carers questionnaire). An “other” option was also included.

The table below shows which items were included in the school uniform and whether each item included was required or optional, for both primary and secondary schools.

Table 3.1 : Items of uniform required – Primary Schools

Base = All Primary schools requiring uniform (n=194)

	Required %	Optional %	Total %
Sweatshirt/jumper/cardigan	67	30	97
Blouse/shirt	50	36	86
Trousers/skirt	59	24	83
Dress/pinafore	28	45	73
Shorts	38	24	62
Blazer	1	1	2
Tie	15	13	28
Specific type of shoes	25	7	32
Specific type of coat	1	9	10
Bag	22	31	53
Specific type of socks	2	4	6
Cap/Hat	1	17	18
Specific scarf	1	1	2
Badges	1	2	3
Polo Shirts	*	1	
Fleece	0	2	2
Other	5	*	5

Table 3.1 : Items of uniform required – Secondary Schools
 Base = All Secondary schools requiring uniform (n=84)

	Required %	Optional %	Total %
Sweatshirt/jumper/cardigan	59	32	91
Blouse/shirt	97		97
Trousers/skirt	98		98
Dress/pinafore	-	4	4
Shorts	39	5	44
Blazer	46	1	47
Tie	78	1	79
Specific type of shoes	54	4	58
Specific type of coat	12	12	24
Bag	38	25	63
Specific type of socks	23	8	31
Cap/Hat		3	3
Specific scarf	1	6	7
Badges	30	3	33
Polo Shirts	1	-	1
Fleece	-	-	
Other	7	-	7

There were differences between secondary and primary schools in terms of the items required for uniform.

The pattern is similar to the findings from the parent’s survey. Primary schools were more likely to include a dress or pinafore or a pair of shorts in their uniform. Secondary schools however were more likely to include trousers or skirt, a blazer, a specific type of tie or socks and a school badge.

Primary schools were also more likely to say an item of uniform was optional rather than required compared to secondary schools.

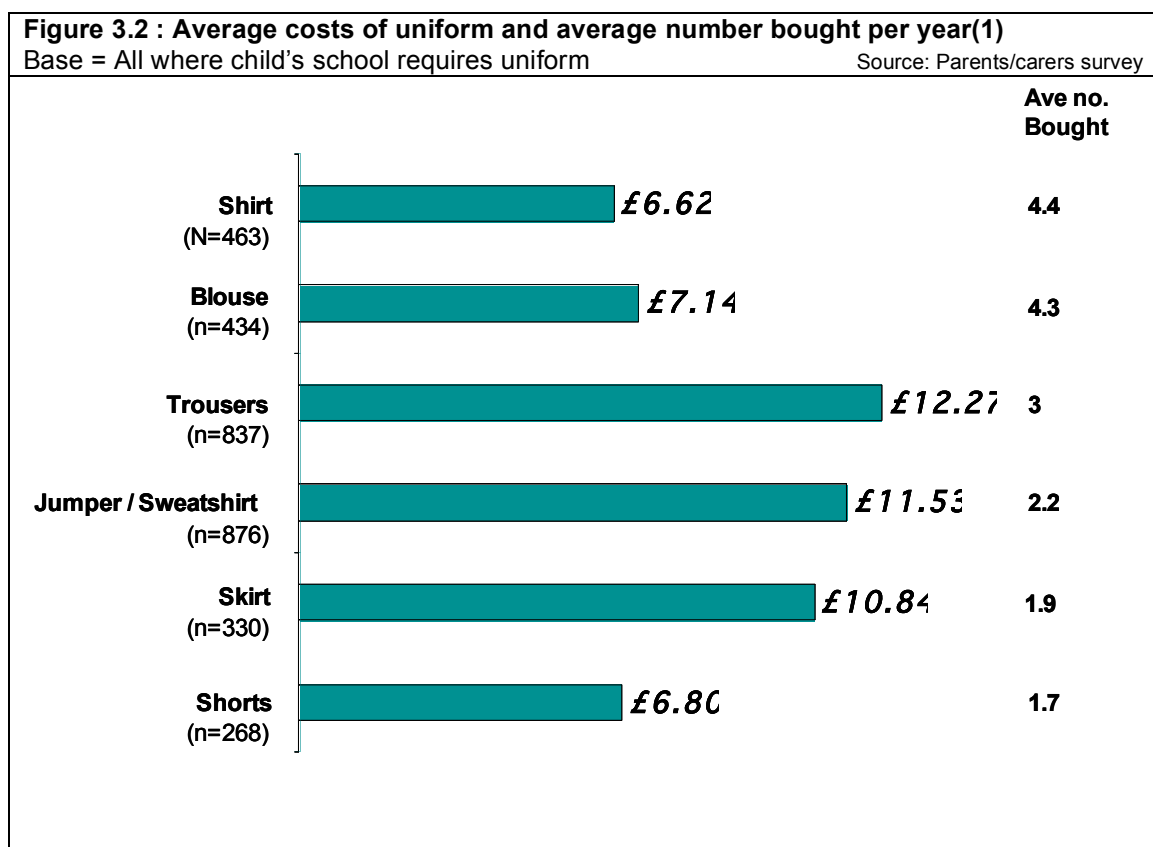
3.1.2 Costs of each item of uniform

3.1.2.1 Parents/carers

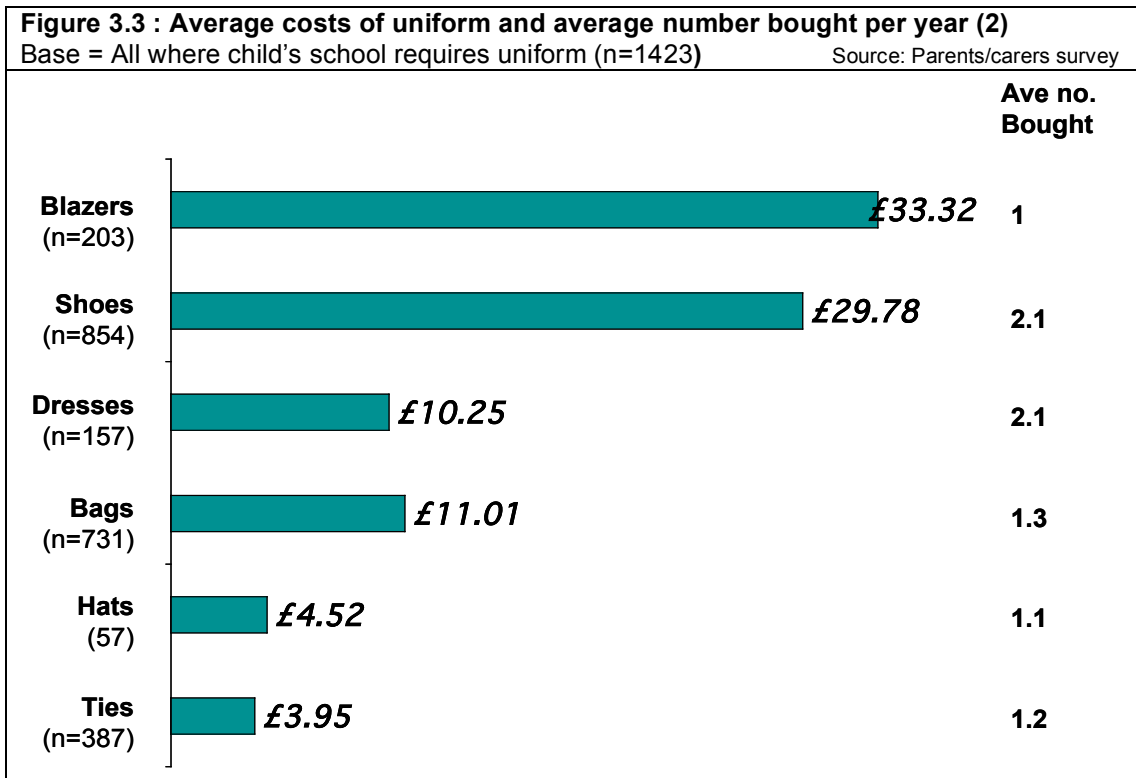
Once the make up of the school uniform required for their children had been established, parents/carers were then asked how many of each item they bought in 2003 and the typical cost of each type of clothing¹.

These questions were asked for a maximum of four items (selected randomly) included in their child's uniform - time constraints with the questionnaire meant that respondents could not be asked about all items required in each case. Interviewers were instructed to probe for the price of a single item only. For example if the price of a pack of three shirts was given, the cost recorded was calculated on the price of a single item (i.e. divided by 3).

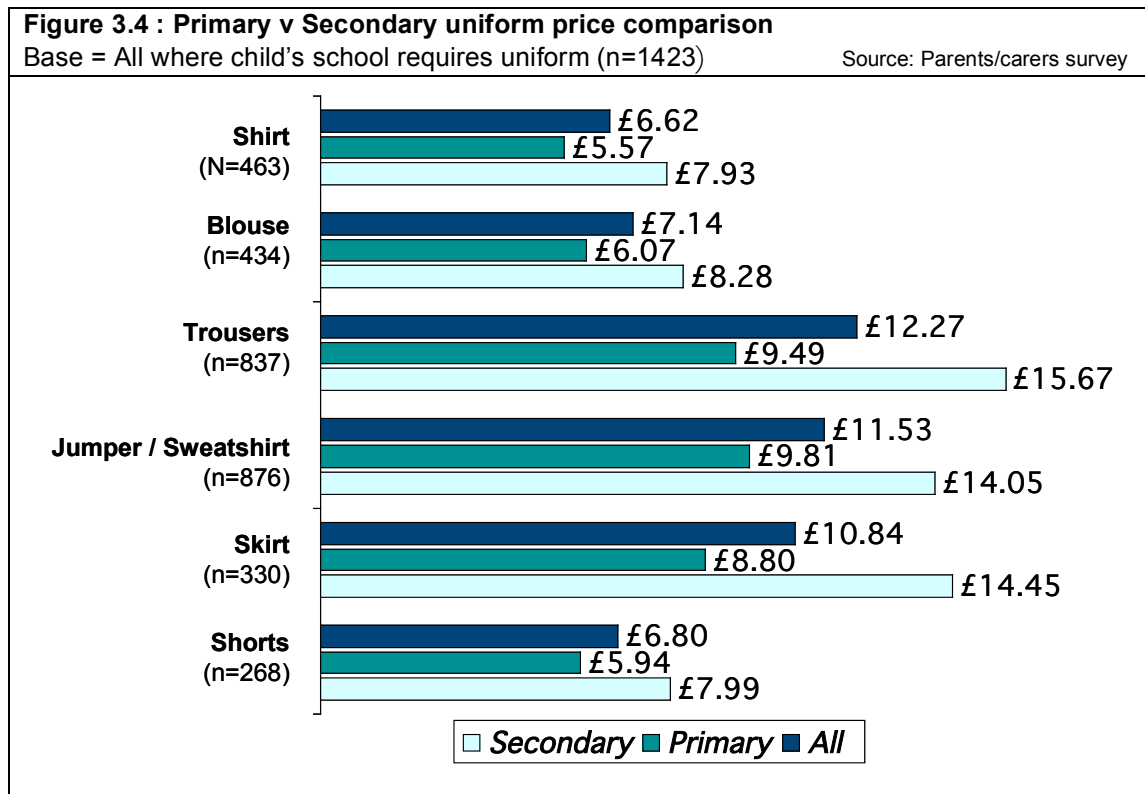
The following two charts show the average costs for each item (single item) of uniform and the average number bought in a year based on a random subset.



¹ This approach to obtaining costs relies on respondent recall over a 12 month period. Therefore some degree of caution must be used when assessing the results - recall will not always be totally accurate. Diaries would have offered a more accurate reflection of costs but the time constraints of the project meant this was not a viable option. Please refer to the technical appendix for a more detailed discussion of methodology



As might be expected, the average prices paid for each item differed between primary and secondary schoolchildren - as the chart below shows.



Each item of uniform was consistently more expensive for parents/carers of secondary pupils compared to those with children at primary school. This can be explained, at least in part, by bigger sizes being required by secondary pupils.

This suggests a significant increase in uniform costs exists for parents/carers once their child reaches secondary school, a suggestion that is examined in more detail later in the report.

3.1.2.2 Schools survey

Schools were also asked to give prices for each item (whether required or optional) included in their school uniform.

As mentioned in the last section, as a result of time and spatial constraints with the two questionnaires and in the interests of examining as many different costs as possible, the list of items of uniform differed slightly between the parents/carers questionnaire and the schools questionnaire.

Shirts/blouses and trousers/skirts were combined as a single item in the Schools questionnaire. The schools questionnaire also included an “other” option (from which Polo shirts and Fleeces were added to the list of items after fieldwork). Parents were not asked whether they were required to purchase specific coats, socks or scarves or badges.

The table overleaf shows the average price given by primary schools for each item (and includes where applicable a comparison with the average price calculated from the parents/carers of primary schoolchildren).

Table 3.2 : Average cost of item of uniform - Schools & Parents comparison

Base = All primary schools where item required or optional

	Ave Price (Schools)	Ave Price (Parents)	Per cent difference
	£	£	%
Sweatshirt/jumper/cardigan (n=189)	8.61	9.81	Parents: 14% higher
Blouse (n=165)	5.73 ¹	5.97	Parents: 4% higher
Shirt (n=165)	5.73	5.57	Schools: 3% higher
Trousers (n=159)	7.87 ²	9.49	Parents: 21% higher
Skirt (n=159)	7.87	8.80	Parents: 12% higher
Dress/pinafore (n=140)	8.18	9.79	Parents: 20% higher
Shorts (n=118)	4.56	5.94	Parents: 31% higher
Blazer (n=4)	30.00	21.87	Schools: 27% higher
Tie (n=47)	2.57	3.47	Parents: 35% higher
Specific type of shoes (n=58)	19.00	26.08	Parents: 37% higher
Specific type of coat (n=17)	15.97	N/A ³	-
Bag (n=107)	3.29	7.59	Parents: 130% higher
Specific type of socks (n=13)	2.32	N/A ³	-
Cap/Hat (n=36)	3.37	4.34	Parents: 29% higher
Specific scarf (n=5)	6.97	N/A ³	-
Badges (n=6)	2.02	N/A ³	-
Polo Shirts (n=4)	11.91	N/A ³	-
Fleece (n=4)	13.24	N/A ³	-

¹ In the Schools questionnaire, shirts/blouses were combined as a single item - the average cost for both items combined is used for comparative purposes

² In the Schools questionnaire, trousers/skirt were combined as a single item - the average cost for both items combined is used for comparative purposes

³ Parents were not asked whether they were required to purchase specific coats, socks, scarves or badges.

The table below shows a comparison of average price given by secondary schools for each item and a comparison with costs from the parents/carers survey.

Table 3.2 : Average cost of item of uniform - Schools & Parents comparison

Base = All secondary schools where item required or optional

	Ave Price (Schools)	Ave Price (Parents)	Per cent difference
	£	£	%
Sweatshirt/jumper/cardigan (n=76)	12.86	14.05	Parents: 9% higher
Blouse (n=81)	7.78	8.28	Parents: 6% higher
Shirt (n=81)	7.78 ¹	7.93	Parents: 2% higher
Trousers (n=82)	14.48	15.67	Parents: 8% higher
Skirt (n=82)	14.48 ²	14.45	Schools: less than 1% higher
Dress/pinafore (n=4)	14.66	15.00	Parents: 2% higher
Shorts (n=38)	6.00	7.99	Parents: 33% higher
Blazer (n=36)	30.86	34.92	Parents: 13% higher
Tie (n=65)	3.73	4.18	Parents: 12% higher
Specific type of shoes (n=53)	26.83	33.96	Parents: 27% higher
Specific type of coat (n=20)	21.31	N/A ³	-
Bag (n=53)	11.31	14.70	Parents: 30% higher
Specific type of socks (n=28)	3.06	N/A ³	-
Cap/Hat (n=2)	6.00	5.50	Schools: 8% higher
Specific scarf (n=4)	10.00	N/A ³	-
Badges (n=26)	3.32	N/A ³	-

In almost every case where there was a direct comparison between the parents/carers and schools data, for both primary and secondary schools, the parent's estimates of costs were

¹ In the Schools questionnaire, shirts/blouses were combined as a single item - the average cost for both items combined is used for comparative purposes

² In the Schools questionnaire, trousers/skirt were combined as a single item - the average cost for both items combined is used for comparative purposes

³ Parents were not asked whether they were required to purchase specific coats, socks or scarves or badges.

higher than the school's estimates. For some items, such as Sweatshirt/jumper/cardigan, blazer and school bag the percentage difference was considerable.

3.1.3 Total uniform costs

By taking the average price for each item of uniform (based on parents/carers survey) and multiplying by the number of items bought in the previous year, the annual cost to parents/carers for school uniforms was calculated.

Table 3.3 shows the percentage of parents whose child required the item as well as the overall average cost of each item of uniform.

Table 3.3 : Cost of uniform items per child				
Base = All where child's school requires uniform (n=1423) – Random subset				
	% needing item	Ave. cost per item (£)	Ave. no of items bought in 2003	Ave. cost in 2003 (£)
Blouses/shirt	97	7.14	4.3	28.65
Shirts	91	6.61	4.55	27.80
Trousers	88	12.27	2.96	35.30
Skirts	75	10.84	1.95	20.09
Shorts	56	6.80	1.67	11.60
Jumpers	91	11.53	2.18	24.28
Blazers	26	33.32	0.99	32.04
Dresses	42	10.25	2.15	21.00
Ties	47	3.94	1.22	4.55
Shoes	91	29.78	2.15	60.09
School bag	80	11.02	1.34	14.91
Hats	7	4.52	1.05	4.80

Please note the average cost for each item in 2003 has been calculated by multiplying the cost of an item by the number bought for each respondent where the item was needed. An average cost was then calculated for each item based on individual responses to *both* questions. Therefore the average cost is not simply obtained by multiplying the average cost of each item by the average number bought.

Tables 3.4a and b and 3.5a and b show the average spend on each item of uniform in terms of the type of school children attend for both male and female pupils. Please note the average cost for each item in 2003 has been calculated by multiplying the cost of an item by the number bought for each respondent where the item was needed. An average cost was then calculated for each item based on individual responses to *both* questions. Therefore the average cost is not simply obtained by multiplying the average cost of each item by the average number bought. The average total spent on school uniform (based on all parents / carers whose child required a uniform) is also shown.

Table 3.4a : Total annual uniform costs – Primary Male pupils

Base = All with male child at primary school requiring uniform (n=402)
Random subset for each item

	% needing item	Ave. cost per item (£)	Ave. no of items bought in 2003	Ave. cost in 2003 (£)
PRIMARY SCHOOL				
Shirts	88	5.57	4.5	23.73
Trousers	97	9.31	3.5	31.83
Shorts	54	5.94	1.8	10.82
Jumpers	99	9.75	2.5	23.84
Blazers	8	21.14	1.2	21.68
Ties	25	3.63	1.4	4.76
Shoes	88	26.52	2.2	56.82
School bag	76	7.69	1.2	9.33
Hats	11	4.41	1.2	5.10

The average total cost of school uniform for boys attending primary schools was **£132.02**. This average total cost was calculated by working out an average spend for each child only where uniform was required. Only items of uniform required by each child were included in each individual calculation.

Table 3.4b : Total annual uniform costs – Secondary Male pupils

Base = All with male child at secondary school requiring uniform (n=340)

Random subset for each item

	% needing item	Ave. cost per item (£)	Ave. no of items bought in 2003	Ave. cost in 2003 (£)
SECONDARY SCHOOLS				
Shirts	94	7.93	4.2	32.77
Trousers	99	15.97	2.7	43.99
Shorts	58	7.99	1.6	12.60
Jumpers	79	14.40	1.8	26.06
Blazers	54	35.57	1.1	36.46
Ties	76	4.29	1.2	5.01
Shoes	95	37.94	1.8	66.14
School bag	85	15.73	1.4	21.40
Hats	6	5.83	1	6.11

The average total cost of school uniform for boys attending secondary schools was **£191.32**. This average total cost was calculated by working out an average spend for each child only where uniform was required. Only items of uniform required by each child were included in each individual calculation.

Table 3.5a : Total annual uniform costs – Primary Female pupils
 Base = All with female child at primary school requiring uniform (n=361)
 Random subset for each item

	% needing item	Ave. cost per item (£)	Ave. no of items bought in 2003	Ave. cost in 2003 (£)
PRIMARY SCHOOLS				
Blouses/shirt	96	6.07	4.6	25.05
Trousers	75	9.83	2.6	24.59
Skirts	84	8.80	2.0	19.50
Jumpers	98	9.89	1.9	22.34
Blazers	7	23.33	0.8	15.44
Dresses	71	9.79	2.2	20.92
Ties	28	3.29	1.2	3.80
Shoes	89	25.44	2.3	57.62
School bag	78	7.45	1.2	8.96
Hats	9	4.23	1.1	4.38

The average total cost of school uniform for girls attending primary schools was **£138.28**. This average total cost was calculated by working out an average spend for each child only where uniform was required. Only items of uniform required by each child were included in each individual calculation.

Table 3.5b : Total annual uniform costs – Female pupilsBase = All where child's school requires uniform (n=319) – Random subset for each item

	% needing item	Ave. cost per item (£)	Ave. no of items bought in 2003	Ave. cost in 2003 (£)
SECONDARY SCHOOLS				
Blouses/shirt	99	8.28	4.2	32.40
Trousers	82	15.97	2.8	43.99
Skirts	66	14.45	1.5	21.05
Jumpers	87	13.71	2.2	25.80
Blazers	41	33.33	0.9	31.32
Dresses	9	15.00	1.5	21.67
Ties	65	4.05	1.1	4.23
Shoes	96	29.89	2.2	60.09
School bag	82	13.73	1.6	21.43
Hats	2	3.50	0.5	1.75

The average total cost of school uniform for girls attending secondary schools was **£175.33**. This average total cost was calculated by working out an average spend for each child only where uniform was required. Only items of uniform required by each child were included in each individual calculation.

Looking at the average total amount spent by parents/carers whose child needed a school uniform, the difference in costs for both male and female pupils between primary and secondary is quite considerable. For male pupils the difference between a school uniform for primary and a uniform for secondary schools is £59.30 – 45 per cent higher. For female pupils the difference between primary and secondary uniform is £37.05 – 27 per cent higher. There are substantial increases in costs which highlight the expense faced by parents/carers when children reach secondary school age.

3.2 PE kit

3.2.1 Whether PE kit required

3.2.1.1 Parents/carers survey

Parents/carers were first asked whether their child required a PE kit for school. Nearly nine out of ten parents/carers (89 per cent) said their child did need some form of PE kit for school.

There were slight differences between primary and secondary schoolchildren. Eighty-three per cent of parents/carers with primary schoolchildren said their child's school required pupils to have a PE kit compared to 95 per cent of parents/carers with children at secondary school. This probably reflects the different nature of PE lessons at secondary schools, with more organised, team orientated sports being played which requires appropriate equipment.

3.2.1.2 Schools survey

Schools were also asked whether they had a PE kit. Overall 98 per cent of Primary schools and 98 per cent of secondary schools said they had a PE kit of some description. There were no discernable differences in the likelihood of having a PE kit between schools in terms of the different types of funding.

3.2.2 Items required for PE kit

3.2.2.1 Parents/carers survey – PE kit requirements

Parents/carers who needed to buy their child a PE kit were then asked which items the kit consisted of.

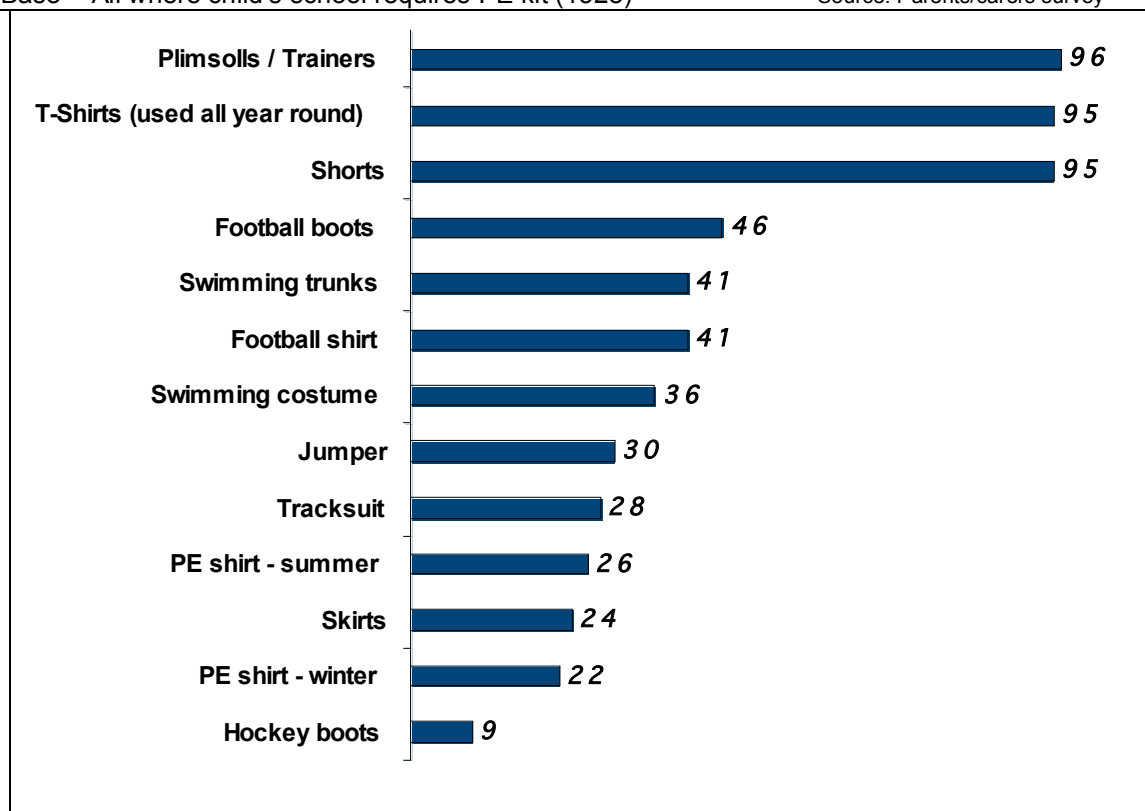
As with the uniform section, a list of potential items of PE kit was read out filtered on the gender of the child.

The chart overleaf shows each item of PE kit and the percentage of parents/carers who said the item was included in their child's PE kit. Again, as with the uniform section, some items are based on parents/carers of female pupils only (Skirts/Hockey boots/Swimming costume) and others based on parents/carers of male pupils only (football or rugby shirts and boots/swimming trunks).

Figure 3.5 : PE kit requirements identified by parents

Base = All where child's school requires PE kit (1328)

Source: Parents/carers survey



There were differences between primary and secondary schools in terms of the make up of PE kits. Children at secondary school were much more likely to need more *specialist* items included in their PE kit than their primary school counterparts. Items such as *seasonal* clothing (Winter PE shirt and Summer PE shirt), skirts, football tops and football/rugby or hockey boots were all much more likely to be included in a typical secondary school PE kit compared to primary school (as highlighted in the next table).

Table 3.6 : PE kit requirements

Base = All where child's school requires PE kit (n=1328)

	ALL	Primary	Secondary
	%	%	%
Plimsolls/Trainers	96	96	95
Shorts	95	98	93
T-Shirts (used all year round)	95	97	93
Football boots	46	19	75
Swimming trunks	41	46	36
Swimming costume	36	42	30
Jumper	30	22	38
Tracksuit	28	26	29
PE shirt - summer	26	17	35
PE shirt - winter	22	14	31
Football shirt	41	12	72
Skirts	24	7	42
Hockey boots	9	*	18

3.2.2.2 Schools survey – PE kit requirements

Schools were also asked to record which items of clothing were included in their PE kit. They were also asked to state whether the item was required or optional.

Again a slightly different list was used for the schools questionnaire, enabling items such as tracksuit top and jogging bottoms to be included (time constraints meant they could not be part of the parents/carers questionnaire). An “other” option was also included.

The table below shows which items were included in the school PE kit and which were required and which were optional. Data for primary schools is shown first.

Table 3.7: Items of PE Kit required – Primary Schools
Base = All Primary Schools requiring PE kit (192)

	Total	Required	Optional
	%	%	%
Shorts	89	83	6
T-shirt	90	80	10
Full tracksuit	28	3	25
Jogging bottoms	40	8	32
Tracksuit top	28	3	25
Jumper	15	3	12
Trainers or plimsolls	82	78	4
Football/rugby shirt	11	2	9
Netball skirt	10	<1	10
Swimming costume	56	52	4
Football/rugby/hockey boots	27	5	22
Other	3	2	1

Table 3.7: Items of PE Kit required – Secondary Schools
 Base = All Secondary Schools requiring PE kit (82)

	Total	Required	Optional
	%	%	%
Shorts	95	89	6
T-shirt	97	94	3
Full tracksuit	55	3	52
Jogging bottoms	61	14	47
Tracksuit top	52	2	50
Jumper	43	8	35
Trainers or plimsolls	95	92	3
Football/rugby shirt	86	77	9
Netball skirt	61	42	19
Swimming costume	33	29	4
Football/rugby/hockey boots	85	70	15
Other	9	4	5

Again, as with uniform, secondary schools were more likely to say items of PE kit are more likely to be required than optional – adding to the increase in costs for parents/carers of secondary school pupils.

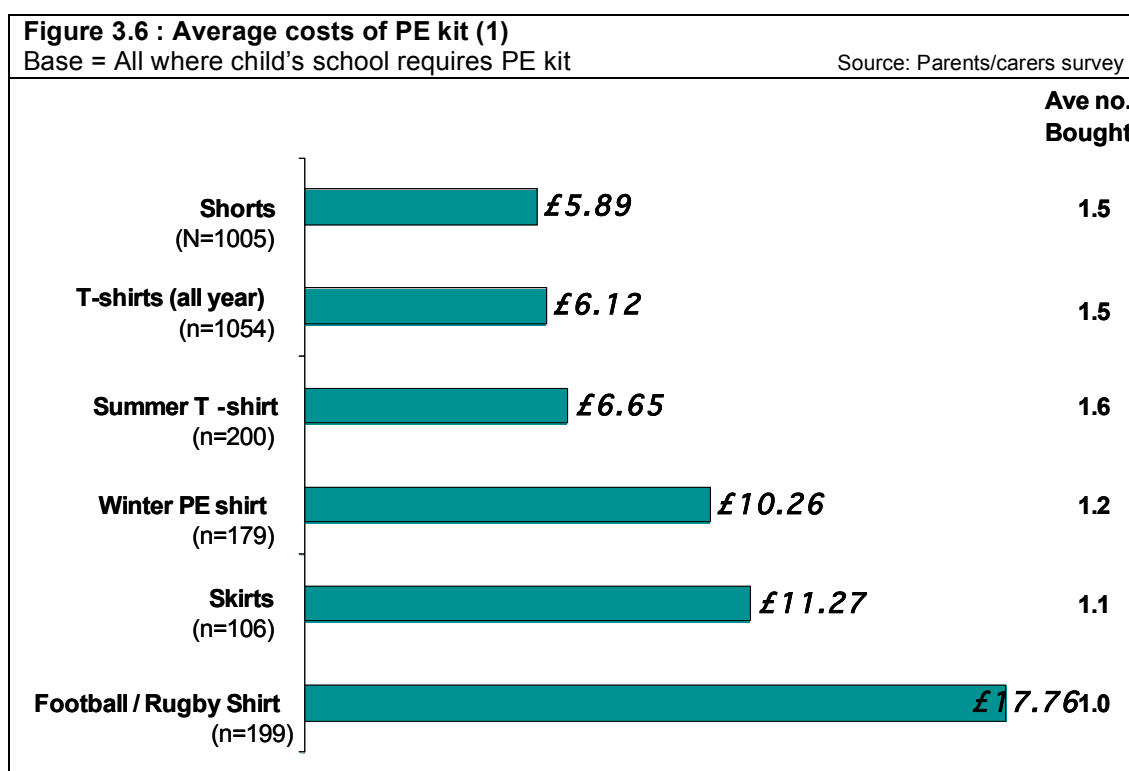
Primary schools were more likely to require swimming costumes (56 per cent compared to 33 per cent) – probably a consequence of the fact swimming lessons are part of the national curriculum for years 4, 5 and 6.

3.2.3 Costs of each item

3.2.3.1 Parents/carers survey

Parents/carers were then asked how many of each item of PE kit they bought in 2003 and the typical cost of each type of clothing or equipment.¹ As with the uniform section, these questions were asked for a maximum of four items included in their child's PE kit. The items were selected randomly. (Again, time constraints with the questionnaire meant costs could not be asked for all items required in each case).

The following two charts show the average costs for each item of PE kit and the average number of items bought in 2003.

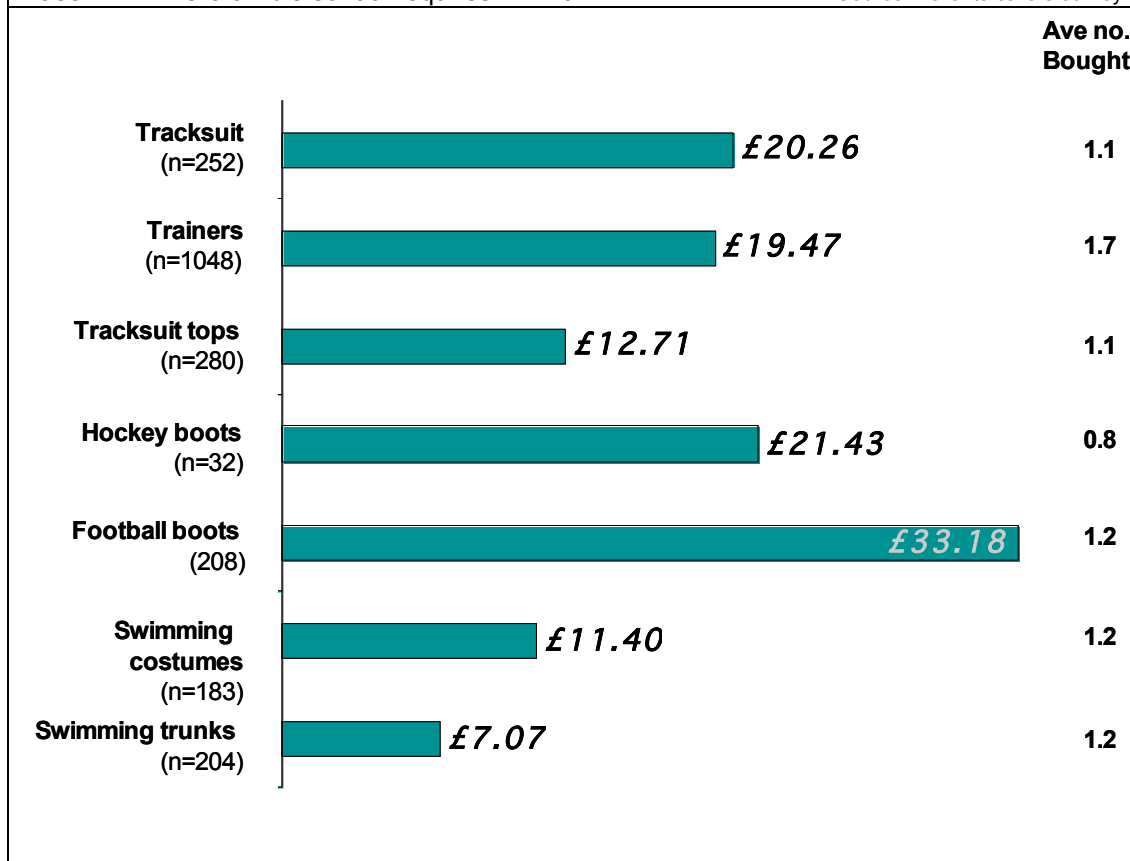


¹ This approach to obtaining costs relies on respondent recall over a 12 month period. Therefore some degree of caution must be used when assessing the results - recall will not always be totally accurate. Diaries would have offered a more accurate reflection of costs but the time constraints of the project meant this was not a viable option. Please refer to the technical appendix for a more detailed discussion of methodology

Figure 3.7 : Average costs of PE kit (2)

Base = All where child's school requires PE kit

Source: Parents/carers survey



3.2.3.2 Schools survey

Schools were also asked to give prices for each item (either required or optional) included in their PE Kit.

As mentioned in the last section, as a result of time and spatial constraints with the two questionnaires and in the interests of examining as many different costs as possible, the list of items of PE kit differed slightly between the parents/carers questionnaire and the schools questionnaire.

Parents were not asked whether they were required to purchase jogging bottoms. Tracksuit tops and Jumpers were combined for the Parents questionnaire.

Schools were asked about requirements for swimming costumes. Parents were asked about either a swimming costume or trunks depending on the sex of their child.

Schools were asked about football, rugby and hockey boots requirements as a combined item. Parents were asked about football/rugby boots and hockey boots separately, depending on the sex of their child

The chart overleaf shows the average price given for each item for primary schools, together with a comparison with the parents/carers data.

Table 3.8 : Ave cost of items of PE Kit required – Schools & Parents
 Base = All primary schools where item is either required or optional (n=192)

	Ave cost (Schools)	Ave cost (Parents)	% difference
	£	£	%
Shorts (n=169)	4.05	4.97	Parents: 22% higher
T-shirt (n=170)	3.95	4.92	Parents: 24% higher
Full tracksuit (n=55)	14.77	16.40	Parents: 11% higher
Jogging bottoms (n=84)	7.15	N/A ¹	N/A
Tracksuit top (n=61)	8.44	10.17	Parents: 20% higher
Jumper (n=30)	6.95	10.17 ²	Parents: 46% higher
Trainers or plimsolls (n=159)	8.99	10.18	Parents: 13% higher
Football/rugby shirt (n=23)	9.97	16.14	Parents: 62% higher
Netball skirt (n=18)	7.29	9.68	Parents: 33% higher
Swimming costume/trunks (n=114)	7.37	7.91 ³	Parents: 7% higher
Football/rugby/hockey boots (n=55)	16.09	28.64	Parents: 78% higher

As with school uniform costs, for almost every item of PE kit the parents/carers estimate of price is higher than those given by the schools themselves.

¹ Parents were not asked about requirements for jogging bottoms

² Parents were asked about requirements for tracksuit tops and jumpers as a joint question – the average cost of both items combined is shown for comparative purposes

³ Schools were asked about requirements for swimming costumes whereas parents/carers were asked about swimming costume or trunks depending on the sex of their child. The average costs of swimming costumes and trunks from the parent's survey have been combined for comparative purposes.

Table 3.8 : Ave cost of items of PE Kit required – Schools & Parents
 Base = All secondary schools where item is either required or optional (n=84)

	Ave cost (Schools)	Ave cost (Parents)	% difference
	£	£	%
Shorts (n=80)	6.19	7.24	Parents: 17% higher
T-shirt (n=80)	7.23	7.71	Parents: 7% higher
Full tracksuit (n=46)	25.89	24.71	Schools: 5% higher
Jogging bottoms (n=50)	12.26	N/A ¹	-
Tracksuit top (n=42)	13.44	14.60 ²	Parents: 9% higher
Jumper (n=35)	11.76	14.60	Parents: 24% higher
Trainers or plimsolls (n=78)	27.43	31.25	Parents: 14% higher
Football/rugby shirt (n=71)	15.93	16.86	Parents: 7% higher
Netball skirt (n=49)	11.35	11.57	Parents: 2% higher
Swimming costume (n=30)	11.35	11.03 ³	Schools: 3% higher
Football/rugby/hockey boots (n=69)	27.16	32.52 ⁴	Parents: 20% higher

Again costs given by parents/carers are higher than those given by the school. Even allowing for the fact schools were allowed to give estimates rather than exact costs, there is a strong suggestion that schools underestimate the costs to parents/carers of PE kit (and uniform).

¹ Parents were not asked about requirements for jogging bottoms

² Parents were asked about requirements for tracksuit tops and jumpers as a joint question. The average cost of both items combined is shown for comparative purposes

³ Schools were asked about requirements for swimming costumes whereas parents/carers were asked about swimming costume or trunks depending on the sex of their child. The average cost of swimming costumes and trunks from the parent's survey have been combined for comparative purposes..

⁴ Schools were asked about football, rugby and hockey boots requirements as a joint question. Parents were asked about football/ rugby boots and hockey boots depending on the sex of their child. The average costs of football/ rugby boots and hockey boots from the parent's survey have been combined for comparative purposes.

In the case of secondary schools however, the low base size must be taken into account.

3.2.4 Total PE kit costs

In similar fashion to the uniform costs, by taking the average price for each item of PE kit (from parents/carers survey) and multiplying by the average number of items bought in a year the annual cost to parents/carers for PE kit was calculated.

Table 3.9 shows the percentage of parents whose child required the item as well as the overall average cost of each item of PE kit.

	% requiring item	Ave. cost per item (£)	Ave. no of items bought in 2003	Ave. cost in 2003 (£)
Shorts	95	5.90	1.5	8.60
T-Shirts (used all year round)	95	6.12	1.5	8.84
Summer PE shirts	26	6.65	1.6	10.05
Winter PE shirts	22	10.26	1.2	12.00
Skirts	24	11.27	1.1	12.34
Football/rugby shirts	41	17.76	1.0	17.91
Tracksuit	28	20.26	1.1	22.22
Plimsolls/trainers	96	19.47	1.7	33.81
Jumper	30	12.71	1.1	14.52
Hockey boots	9	21.43	0.8	17.64
Football/rugby boots	46	33.18	1.2	40.19
Swimming costume	36	11.4	1.2	13.53
Swimming trunks	41	7.07	1.3	8.84

Please note the average cost for each item in 2003 has been calculated by multiplying the cost of an item by the number bought for each respondent where the item was needed. An average cost was then calculated for each item based on individual responses to *both* questions. Therefore the average cost is not simply obtained by multiplying the average cost for each item by the average number bought

Table 3.10a and b and 3.11a and b show the average expenditure on each item of PE kit in terms of the type of school children attend for both male and female pupils. Please note the average cost for each item in 2003 has been calculated by multiplying the cost of an item by the number bought for each respondent where the item was needed. An average cost was then calculated for each item based on individual responses to *both* questions. Therefore the average cost is not simply obtained by multiplying the average cost of each item by the average number bought. The average total spent on school PE kit (based on all parents / carers whose child required a PE kit) is also shown.

Table 3.10a : Total annual PE kit costs - MALE

Base = All where child's school requires PE Kit (351) – Random subset for each item

	% requiring item	Ave. cost per item (£)	Ave. no of items bought in 2003	Ave. cost in 2003
PRIMARY				
Shorts	98	5.06	1.5	7.82
T-Shirts (used all year round)	96	5.05	1.5	7.98
Summer PE shirts	17	5.19	2.4	11.54
Winter PE shirts	14	7.25	1.6	11.26
Football/rugby shirts	12	16.14	1.3	27.36
Tracksuit	23	17.83	1.1	20.96
Plimsolls/trainers	95	10.66	1.7	19.76
Jumper	19	10.95	1.1	11.60
Football/rugby boots	19	28.64	1.3	39.11
Swimming trunks	46	6.14	1.3	8.58

The average total cost of PE kit for boys attending primary schools was **£52.53**. This average total cost was calculated by working out an average spend for each child only where PE kit was required. Only items of PE kit required by each child were included in each individual calculation.

Table 3.10b : Total annual PE kit costs - MALE

Base = All where child's school requires PE kit (329) – Random subset

	% requiring item	Ave. cost per item (£)	Ave. no of items bought in 2003	Ave. cost in 2003 (£)
SECONDARY				
Shorts	96	7.28	1.6	11.11
T-Shirts (used all year round)	91	7.53	1.7	11.54
Summer PE shirts	36	7.87	1.2	8.87
Winter PE shirts	29	12.58	1.0	12.80
Football/rugby shirts	72	16.86	1.0	20.57
Tracksuit	19	26.72	1.0	28.82
Plimsolls/trainers	94	32.14	1.7	55.60
Jumper	26	14.33	1.2	20.34
Football/rugby boots	75	34.22	1.2	40.43
Swimming trunks	36	8.59	1.1	9.27

The average total cost of PE kit for boys attending secondary schools was **£127.12**. This average total cost was calculated by working out an average spend for each child only where PE kit was required. Only items of PE kit required by each child were included in each individual calculation.

As table 3.10a and 3.10b shows, PE kit for secondary school pupils is more expensive than for primary school pupils. For every item costs were higher for secondary pupils. Overall the price of PE kit is £74.59 higher, or 142 per cent higher, for male secondary school pupils than it is for male primary school pupils.

Table 3.11a: Total annual PE kit costs - FEMALE

Base = All where child's school requires PE kit (334) – Random subset

	% requiring item	Ave. cost per item (£)	Ave. no of items bought in 2003	Ave. cost in 2003 (£)
PRIMARY				
Shorts	97	4.88	1.5	7.27
T-Shirts (used all year round)	98	4.78	1.9	6.91
Summer PE shirts	17	5.27	1.9	9.17
Winter PE shirts	14	6.67	1.4	9.15
Skirts	7	9.68	1.3	13.67
Tracksuit	31	15.32	1.1	16.36
Plimsolls/trainers	98	9.69	1.8	18.83
Jumper	26	9.73	1.3	12.35
Hockey boots	-	-	-	-
Swimming costume	42	9.91	1.2	11.38

The average total cost of PE kit for girls attending primary schools was **£44.78**. This average total cost was calculated by working out an average spend for each child only where PE kit was required. Only items of PE kit required by each child were included in each individual calculation.

Table 3.11b : Total annual PE kit costs - FEMALE

Base = All where child's school requires PE kit (313) – Random subset

	% requiring item	Ave. cost per item (£)	Ave. no of items bought in 2003	Ave. cost in 2003 (£)
SECONDARY				
Shorts	89	7.19	1.3	9.16
T-Shirts (used all year round)	95	7.85	1.3	9.82
Summer PE shirts	34	7.35	1.5	10.88
Winter PE shirts	33	11.65	1.2	13.02
Skirts	42	11.57	1.0	12.12
Tracksuit	40	23.84	1.1	25.48
Plimsolls/trainers	97	30.43	1.6	49.06
Jumper	49	14.73	1.0	14.30
Hockey boots	18	21.43	0.8	18.21
Swimming costume	30	13.77	1.3	17.17

The average total cost of PE kit for girls attending secondary schools was **£92.39**. This average total cost was calculated by working out an average spend for each child only where PE kit was required. Only items of PE kit required by each child were included in each individual calculation.

The cost of PE kit for female secondary pupils is £74.59 higher, or 106 per cent higher, than for their primary school counterparts, again emphasising the potentially huge increase in costs from primary to secondary school.

3.3 Where uniform can be bought

3.3.1 Parents/carers survey

As well as asking about what items were included in their child's school uniform and the costs involved, parents/carers were also asked whether any items of uniform had to be bought from a designated shop.

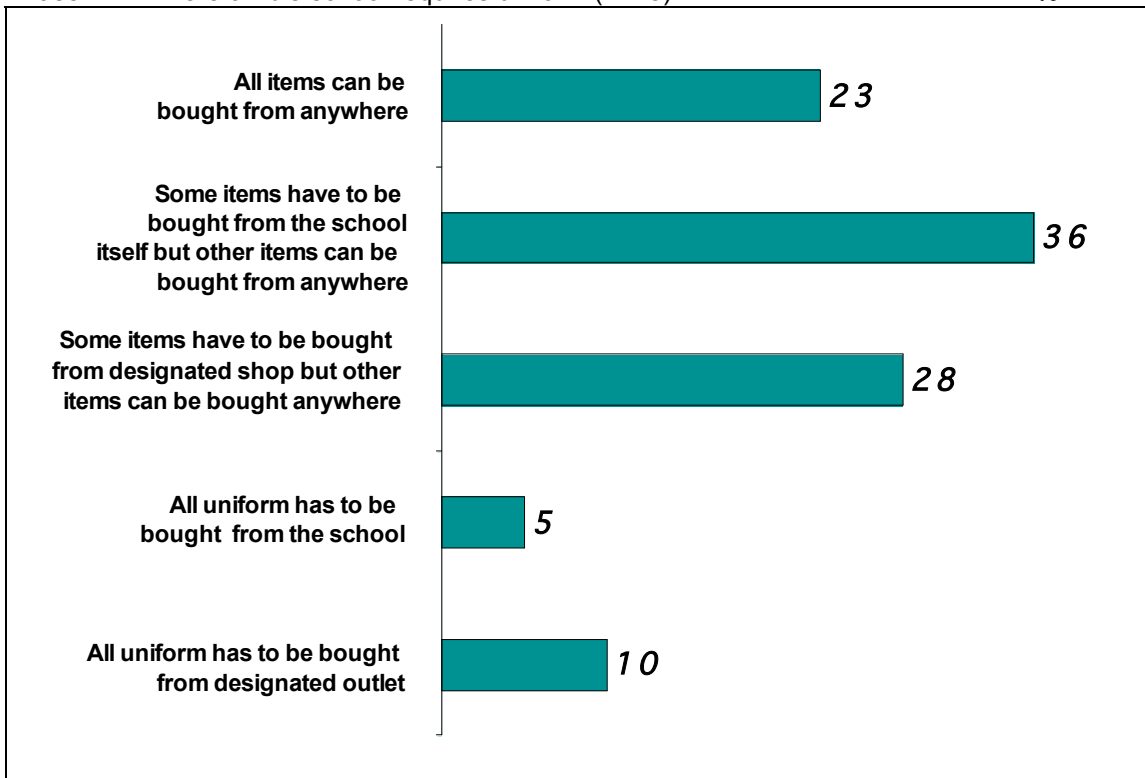
Limitation in terms of choice about where to buy clothes for school uniform can sometimes lead to costs being higher than necessary.

The chart below shows the extent of choice given to parents/carers when buying uniform for their child.

Figure 3.8 : Options available to parents when buying school uniform

Base = All where child's school requires uniform (1428)

%



Under a quarter (23 per cent) said all the items of school uniform could be bought from any shop or outlet.

10 per cent of parents/carers said they had to buy their child's school uniform from a designated outlet. One in twenty (5 per cent) said they had to buy all the uniform direct from the school itself.

Twenty-eight per cent said some items had to be bought from a designated shop and 36 per cent said some items had to be bought from the school itself.

There were differences between primary and secondary schools when it comes to where school uniform could be bought.

Parents/carers of secondary school pupils were more likely to have to buy all items of uniform from a designated outlet than those parents/carers of primary school pupils (16 per cent versus 5 per cent).

In contrast, parents/carers of primary school pupils were twice as likely to be have been able to buy all items of school uniform needed from any shop or outlet (30 per cent said this was the case compared to only 15 per cent of parents/carers of children at secondary school).

3.3.2 Schools survey

The issue was dealt with slightly differently for the schools questionnaire. Schools were asked to record, for each item included (whether required or optional) in their uniform and PE kit, whether or not there was a specific supplier recommended.

The following tables show the proportion of schools saying each item of uniform has to be bought from a specific supplier.

Table 3.12 : Whether uniform item has to be purchased from specific supplier - PRIMARY
Base = All primary schools where item required or optional (n=base)

	Specific Supplier	Not specific supplier	Not Stated
	%	%	%
Sweatshirt/jumper/cardigan (n=189)	68	22	10
Blouse/shirt (n=165)	15	63	21
Trousers/skirt (n=159)	6	76	18
Dress/pinafore (n=140)	6	65	25
Shorts (n=118)	9	68	23
Blazer (n=4)	36	49	15
Tie (n=47)	59	19	23
Specific type of shoes (n=58)	0	72	28
Specific type of coat (n=17)	31	20	49
Bag (n=107)	56	20	24
Specific type of socks (n=13)	12	67	21
Cap/Hat (n=36)	49	10	42
Specific scarf (n=5)	38	14	48
Badges (n=6)	20	30	50
Polo Shirts (n=2)	100	0	0
Fleece (n=4)	100	0	0

Sweatshirts/jumpers/cardigans and badges were the items of uniform for primary schools most likely to have to be bought from specific suppliers (given the base size for polo shirts and fleeces are too low to compare).

Table 3.12 : Whether uniform item has to be purchased from specific supplier - SECONDARY
 Base = All secondary schools where item required or optional (n=base)

	Specific Supplier	Not specific supplier	Not Stated
	%	%	%
Sweatshirt/jumper/cardigan (n=76)	63	25	11
Blouse/shirt (n=81)	25	63	12
Trousers/skirt (n=82)	24	63	13
Dress/pinafore (n=4)	-	78	22
Shorts (n=38)	20	56	24
Blazer (n=36)	37	50	13
Tie (n=65)	72	14	14
Specific type of shoes (n=53)	-	80	20
Specific type of coat (n=20)	7	60	33
Bag (n=53)	4	74	22
Specific type of socks (n=28)	7	63	31
Cap/Hat (n=2)	55	-	45
Specific scarf (n=4)	76	24	-
Badges (n=26)	87	8	5
Polo Shirts (n=2)	100	-	-

Ties, badges and scarves were the items of uniform for secondary schools to have to be bought from specific suppliers.

The following table shows the proportion of primary schools whose items of PE kit have to be bought from a specific supplier.

Table 3.13 : Whether PE kit item has to be purchased from specific supplier - PRIMARY
Base = All primary schools where item is either required or optional (n=base)

	Yes Specific Supplier	Not specific supplier	Not Stated
	%	%	%
Shorts (n=169)	11	82	6
T-shirt (n=170)	23	69	7
Full tracksuit (n=55)	7	71	22
Jogging bottoms (n=84)	3	76	22
Tracksuit top (n=61)	4	72	24
Jumper (n=30)	2	78	19
Trainers or plimsolls (n=159)		87	13
Football/rugby shirt (n=23)	13	67	20
Netball skirt (n=18)	7	72	21
Swimming costume (n=114)	1	82	17
Football/rugby/hockey boots (n=55)		72	28

T-shirts and Football or rugby shirts were the items of PE kit for primary schools most likely to have to be bought from a specific supplier (23 per cent and 13 per cent).

The following table shows the proportion of secondary schools whose items of PE kit have to be bought from a specific supplier.

Table 3.13 : Whether PE kit item has to be purchased from specific supplier – SECONDARY
Base = All secondary schools where item is either required or optional (n=base)

	Yes Specific Supplier	Not specific supplier	Not Stated
	%	%	%
Shorts (n=80)	30	60	11
T-shirt (n=80)	35	53	11
Full tracksuit (n=46)	10	69	20
Jogging bottoms (n=50)	4	72	24
Tracksuit top (n=42)	12	62	26
Jumper (n=35)	20	63	18
Trainers or plimsolls (n=78)		85	15
Football/rugby shirt (n=71)	66	26	8
Netball skirt (n=18)	30	47	24
Swimming costume (n=114)	5	78	16
Football/rugby/hockey boots (n=55)	2	80	17

Again T-shirts and Football or rugby shirts were the items of PE kit for primary schools most likely to have to be bought from a specific supplier.

3.4 Whether school provides new or second hand uniform.

3.4.1 Parents/carers survey

Parents/carers were then asked whether their child's school provided any opportunity to buy or supply new or used school uniforms.

Nearly a quarter of parents/carers (24 per cent) said their school did not provide any opportunity to buy or obtain new or used school uniform. A further nine per cent said they did not know either way.

That left sixty-seven per cent of parents/carers who said their child's school did have some provision for the supply of new or second hand uniforms.

Thirty one per cent said their child's school provided opportunity to buy new uniform only from a school shop. A further eight per cent said only second hand uniforms were on offer.

Just over a quarter (28 per cent) of parents/carers said their child's school did provide the opportunity to buy or supply *both* new and used school uniforms.

3.4.2 Schools survey

Schools were given a list of possible sources of assistance (including the provision of new or second hand school uniform) available to parents/carers for uniform. They were asked whether each source of assistance was available to parents/carers at the school, whether the type of assistance was publicised to parents/carers and the frequency of use of each type (if available) in 2003.

Table 3.14 : Sources of assistance available to parents

Base = All Schools where uniform required (n=278)

	Primary (n=194)		Secondary (n=84)	
	% where Available	% publicised	% where Available	% publicised
LEA Grant	32	57	55	86
School provides second hand uniform free of charge	41	26	66	26
School offer second hand uniform at reduced price	32	60	29	68
School/PTA fund	16	34	39	46
Local Charity	10	72	23	66

Primary schools were much less likely than secondary schools to offer each of the respective sources of assistance (apart from offering second hand uniform at a reduced price).

It is interesting to note the low percentage of schools publicising fact that second hand uniform is available free of charge. Around a quarter of both secondary schools and primary schools (26 per cent for both types of school), who offered this type of assistance, actually said they publicised it.

The table below shows how many times each type of assistance was used in 2003, for both primary and secondary (base too low to show separately).

Table 3.15 : Frequency of use of sources of assistance available to parents

Base = All schools where assistance available (n=base)

	Once only	Twice	3-9	10 +	Never used
LEA Grant (n=80)	8	3	10	7	69
School provides second hand uniform free of charge (n=118)	5	9	12	13	61
School offer second hand uniform at reduced price (n=68)	5	11	10	19	54
School/PTA fund (n=52)	13	7	14	11	55
Local Charity (n=19)	15	-	5	30	50

As is clear from the final column in the table, over half of schools in which each type of assistance was available said it had never been used in the previous year. However the small base sizes for each type of assistance must be borne in mind when assessing these results.

3.5 Financial assistance with uniform

Parents/carers were asked whether they received any financial help or assistance with buying their child's school uniform.

Overall nearly all parents/carers (96 per cent) said they did not receive any financial assistance. Of those that did receive some form of assistance, social grade was unsurprisingly closely associated – given the means tested nature of statutory help available. Fifteen per cent of those parents/carers in social grade E and seven per cent in social grade D said they received assistance compared to none in grades A and B. There were differences too between household make up. Nine per cent of single parent families said they received some form of financial assistance compared to only one per cent of two parent families.

The most prevalent form of assistance taken up was the Local Education Authority Grant with 73 per cent of those claiming assistance saying this was what they received. Other types of assistance mentioned included assistance from families and charities.

3.6 Consequences of not wearing uniform

Consequences of pupils not wearing the right uniform were examined in both the parents/carers and schools surveys.

Parents/carers were asked whether their child had ever been sent home for not wearing any uniform. Only two per cent of parents/carers said this had ever happened. Given the small base size no real sub group differences were evident.

It should be pointed out answers to this question could have been influenced by a reluctance on the part of the parent to admit to having their child being sent home because of a lack of uniform either through pride or embarrassment. It should also be noted many instances of pupils being sent home, for whatever reason, are not always relayed accurately to the parent.

Schools were asked what happens when a pupil comes to school without school uniform and also what happens when a pupil has no sports kit.

The table below shows the action taken by schools regarding school uniform.

Table 3.16 : What could happen when pupil comes to school with no school uniform
Base = All Schools where uniform required (n=278)

	Primary (n-194)	Secondary (N=84)	Overall
	%	%	%
Pupil receive verbal warning	29	81	45
Pupil loaned a uniform	20	62	33
Warning letter sent home	13	56	26
Pupil withdrawn from class	-	33	10
Pupil sent home	-	43	13
Pupil receive detention	<1	19	6
Other:	19	6	15
No action	45	-	31

The most common action taken by schools was that the pupil concerned would be given a verbal warning. Just under half (45 per cent) of all schools said this was an option used, however secondary schools were far more likely to use it than primary schools (81 per cent v 29 per cent).

Secondary schools were far more likely to take action, by whatever means, than primary schools Eighty-one per cent said pupils could receive a verbal warning, 62 per cent said pupils could be loaned a uniform and 56 per cent said a warning letter to parents/carers could be sent.

Over two in five (43 per cent) of secondary schools said a pupil with no school uniform could be sent home. However it should be pointed out that this survey asked for possible consequences and it should be borne in mind mitigating circumstances would be taken into account by schools on a case by case basis in terms of dealing with a pupil with no school uniform.

The next table shows the possible action taken by schools in cases where a pupil comes to school without an item of PE kit.

Table 3.17 : What happens when a pupil comes to school without an item of PE kit
Base = All Schools where PE kit required (n=274)

	Primary	Secondary	Overall
	%	%	%
Pupil loaned an item	53	65	56
Pupil receives verbal warning	34	80	48
Warning letter sent home	14	50	25
Pupil withdrawn from class	12	29	17
Pupil receives detention	<1	47	14
Pupil sent home	-	8	3
Other	7	1	6
No action	13	-	9

Again secondary schools were more likely to take action than primary schools.

3.7 Uniform requirements for different year groups

Schools were also asked to list any different uniform requirements for each school year, the idea being to get an idea of any additional uniform expenses caused by having to buy different types of uniform within the school.

Unfortunately almost half (44 per cent) of primary schools and 29 per cent of secondary schools did not answer this question.

Just over half of primary schools (51 per cent) and slightly less secondary schools (45 per cent) said there were no differences in uniform between the different year groups.

Six per cent of secondary schools said there was a difference between uniform for years 7-11 and uniform (if any) for 6th form uniform.

Secondary schools were more likely to have different uniform requirements for different school years. Only one per cent of primary schools (2 schools in total) had different coloured attire needed for different year groups, compared to 18 per cent of secondary

schools (16 schools in total). Of these 16 secondary schools, 11 were community schools, one was a foundation school, and four were voluntary aided.

The small sample sizes involved mean it is difficult to examine this issue in more detail. From what data was gathered, the differences in uniform requirements tended to come at years 10 and 11. For example three secondary schools described the difference as being...

- Different coloured sweatshirt for years (7, 8 and 9) and for years (10 and 11)
- Years 7-9 – Green blazer. Years 10/11 – Black blazer.
- Different colour polo shirts: 7-9 yrs + 10 - 11 yrs.

4 School trips

4.1 Parents/carers survey

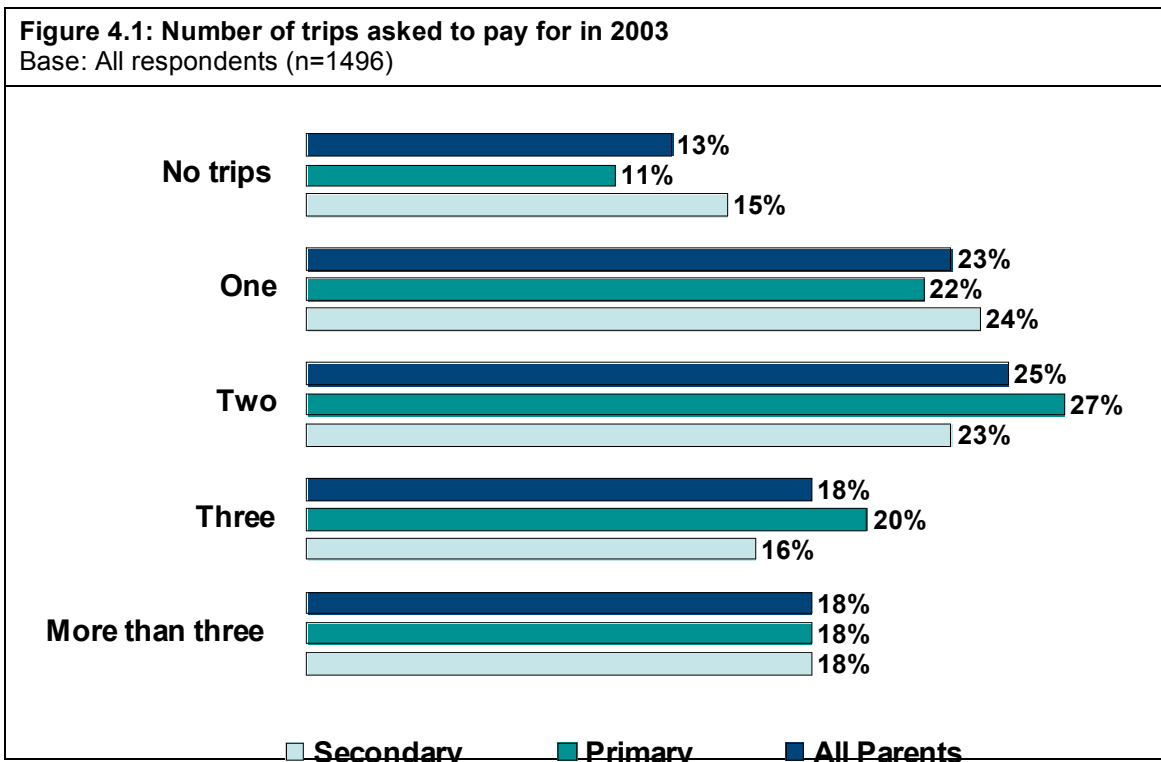
Parents/carers were asked about school trips for their child in 2003. They were specifically asked only about trips they had been asked by the school to pay for or contribute to.

4.1.1 The number of invitations for school trips in 2003

Eighty-four per cent of parents/carers said they had been asked to pay for a school trip in 2003. Thirteen per cent of parents/carers said they had not been asked to pay for any trips last year, with a further three per cent saying they did not know.

In terms of how many trips parents/carers were asked to pay for, overall 23 per cent were asked to pay for one trip, 25 per cent were asked to pay for two, 18 per cent were asked to pay for three and 18 per cent recalled being asked to pay for more than three trips.

This is illustrated in the chart below along with a comparison between those parents/carers with children at primary or secondary schools.

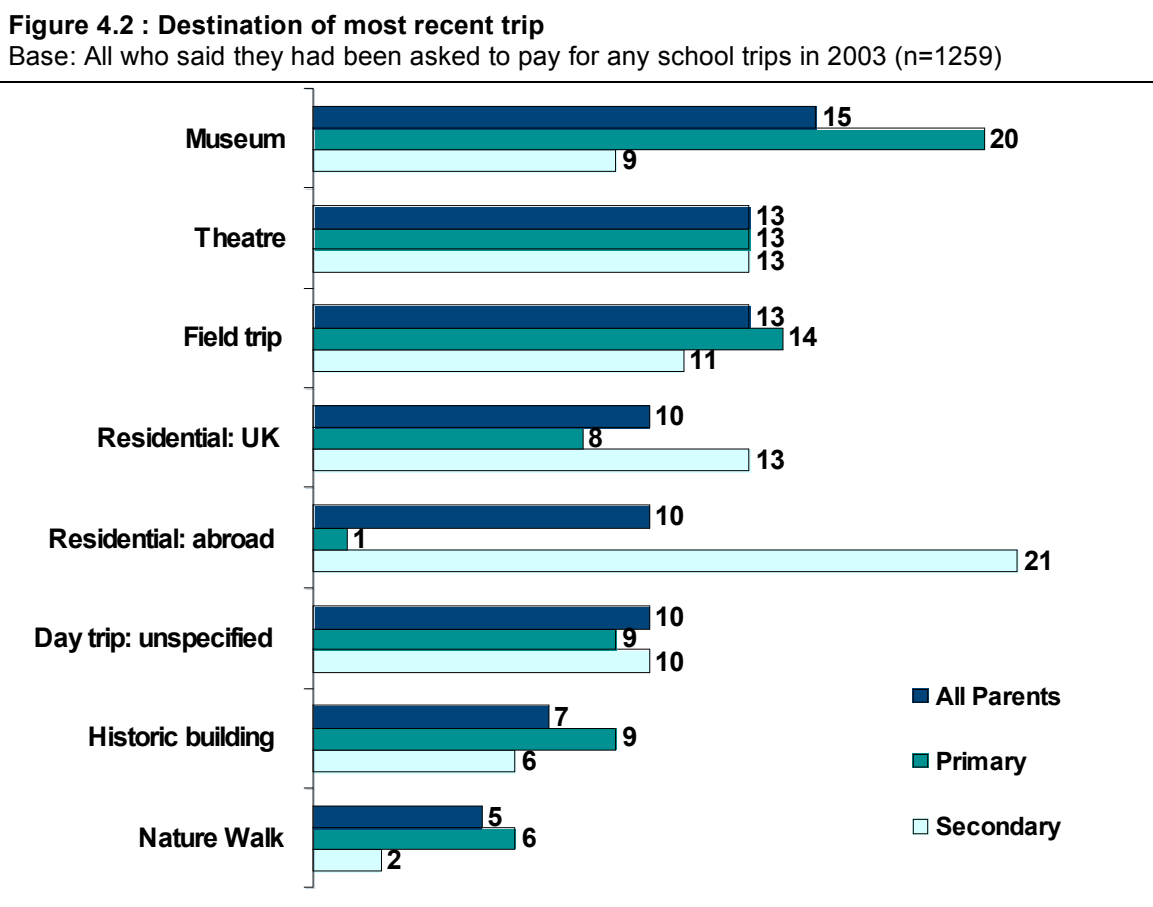


Respondents with children at primary school were more likely to say they had been asked to pay for a school trip in 2003, compared with their counterparts with children at secondary school. Only 11 per cent of parents/carers with children at primary schools said they had not been asked to pay for a trip in 2003 compared to 15 per cent of

parents/carers with secondary school aged children. Those with children at secondary school were also more likely to have been asked to pay for just one trip.

4.1.2 Types of trips

Parents/carers who said they had been asked to pay for any school trip in 2003 were then asked about the destination of the most recent trip. There was a huge variety of types of trips children were asked to go on and the exact listing cannot be shown. Those types of trips mentioned by at least five per cent of parents/carers are listed in the chart below. Again the figures show data for all respondents and then for primary and secondary schools.



Overall the most common destination of the most recent trip parents/carers were asked to pay for was to a museum (15 per cent), theatre (13 per cent) or a field trip (13 per cent). These types of trips might be over-represented due to the timing of study, particularly theatre trips, which are more likely to occur around the end of the autumn term. Residential trips were the most recent trip parents/carers were asked to pay for in 20 per cent of cases. These were equally split between trips within the UK and trips abroad.

Results vary considerably between primary and secondary schools. The most common type of trips parents/carers of primary schoolchildren were asked to pay for were trips to museums (20 per cent), field trip (14 per cent) and theatre trips (13 per cent). The most common trips for children at secondary school were residential trips abroad (21 per cent), theatre trips (13 per cent) and residential trips within the UK (13 per cent). Residential trips in general were far less common for primary schoolchildren (nine per cent altogether) but especially residential trips abroad.

4.1.3 Whether child went on most recent trip

All parents/carers who had been asked to pay for a school trip in 2003 were then asked whether their child actually went on the trip.

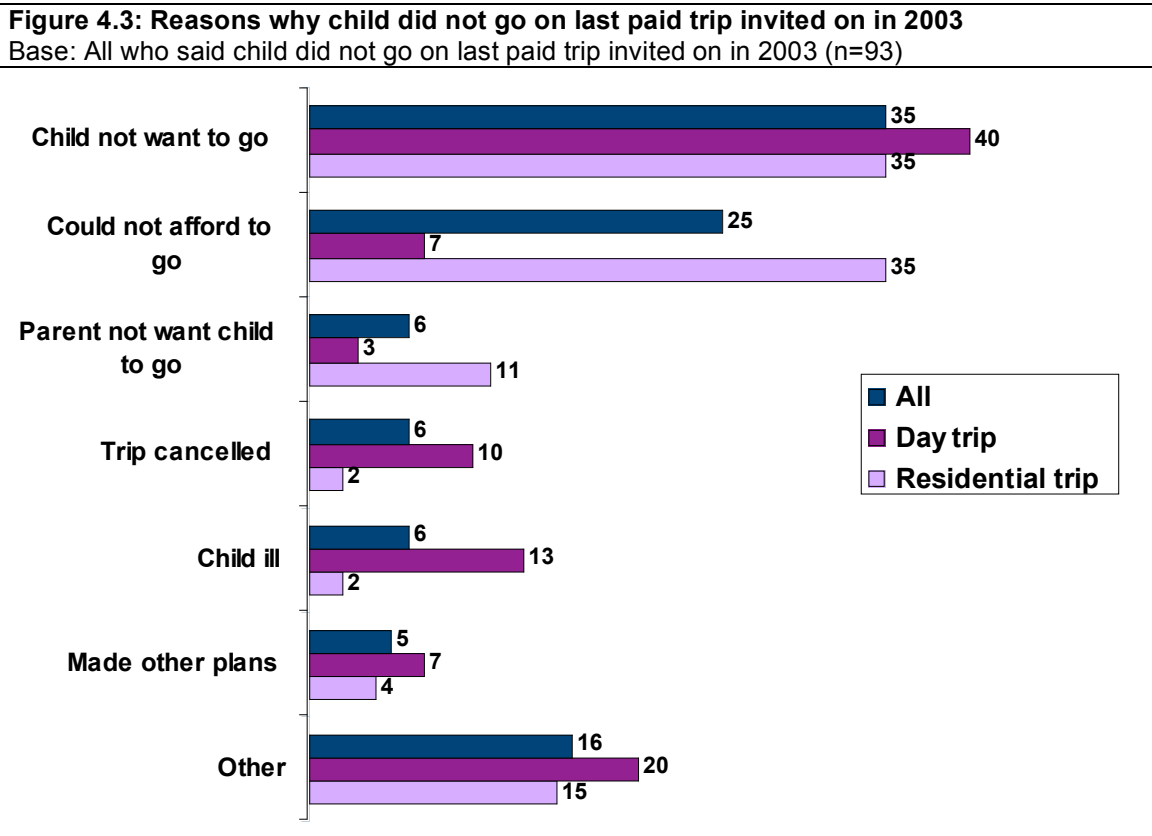
Nearly all (92 per cent) said their child did go on the trip. Overall, only seven per cent said their child did not.

Parents/carers with children at secondary schools were more likely to say their child did not go on the most recent trip offered where parents/carers were asked to pay. Only four per cent of primary schoolchildren did not go on the most recent trip their parent was asked to pay for compared to 12 per cent of secondary schoolchildren. This could be partly explained by the higher likelihood (and presumably higher cost) of trips for secondary schoolchildren being a residential trip. Nineteen per cent of respondents who were asked to pay for residential trips most recently said their child did not go compared to four per cent of those asked to pay for day trips.

Social Grade was also a factor in whether or not children went on the most recent trip. Respondents from C2, D and E social grades were more likely to say their child did not go (nine per cent) than those from ABC1 (six per cent), a difference that is statistically significant (5 per cent confidence level).

4.1.4 Reasons for not going on most recent trip

Parents/carers who said their child did not go on the last paid trip they were invited on were asked why their child did not go. The reasons given are listed in the chart below.



As only seven per cent of parents/carers said their child did not go on the most recent trip they were asked to go on the base size of those whose child did not go is small. Therefore it is not possible to compare reasons by annual household income, social grade or type of school attended.

The differences between primary and secondary schools could be explained by the different proportions of day and residential trips each type of school invites parents/carers to pay for. Parents/carers of secondary schoolchildren were more likely to have been asked to pay for a residential trip compared to parents/carers with children at primary school (34 per cent v nine per cent).

The chart does show clear evidence of the exclusion of some children from residential trips on the grounds of cost.

4.1.5 Average cost of trips - day and residential

Parents/carers were then asked what the cost of the most recent trip was. The average amount paid broken down by type of trip and type of school is shown below.

Table 4.1 : Average cost of trips – parents/carers
Base = All parents/carers giving cost of most recent trip (1028)

	Average cost
	£
Primary	
Day (n=508)	8.32
Residential (n=66)	119.60
Secondary	
Day (n=282)	19.38
Residential (172)	186.72

In terms of day trips, one in five parents/carers (20 per cent) said they paid under £5. Thirty eight per cent said they paid under £10 and 21 per cent said they paid under £15. Twenty one per cent said the day trip they were asked to pay for most recently cost more than £15.

There was a much greater degree of difference between prices for residential trips. Thirty four per cent said the residential trip was under £100. 31 per cent said the trip cost between £100 and £200. Thirty per cent said the trip cost £200 or more.

4.1.6 Whether parents/carers were asked to pay the whole cost of the trip

Of those parents/carers asked to pay for a trip in 2003, well over two thirds (69 per cent) said they were being asked to pay the entire cost of the trip. Only a quarter (25 per cent) thought that they were not. There were differences in terms of the type of trip. Sixty five per cent of those asked to pay for a day trip most recently believed they were paying the full cost compared to 86 per cent of those who were asked to pay for a residential trip. For those asked to pay for a field trip most recently, 68 per cent said they had been asked to pay the entire cost.

There were also differences between parents/carers of primary and secondary pupils. 77 per cent of parents/carers with a child at secondary school said they had been asked to pay the entire cost compared with only 62 per cent of parents/carers with a child at primary school.

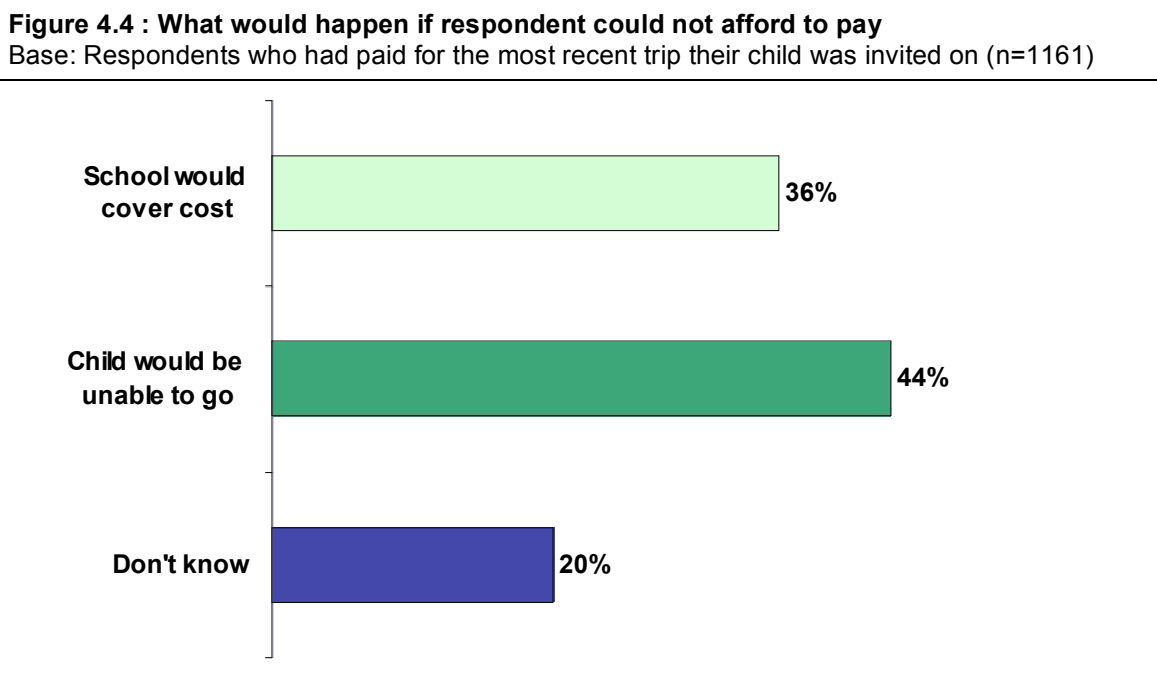
4.1.7 Option to pay by instalments

Parents/carers were asked whether they were offered the opportunity to pay for the most recent school trip by instalments. Overall 39 per cent said they were offered the opportunity to spread the cost. Over half (53 per cent) of parents/carers said they were not offered any opportunity to pay in instalments.

In terms of differences between the different types of trips, 29 per cent of those who were asked to pay for a day trip most recently said they were offered the opportunity to pay by instalments compared to 78 per cent who were asked to pay for a residential trip. This is not surprising given the huge difference in costs between residential and day trips.

4.1.8 Consequences of not being able to afford trip

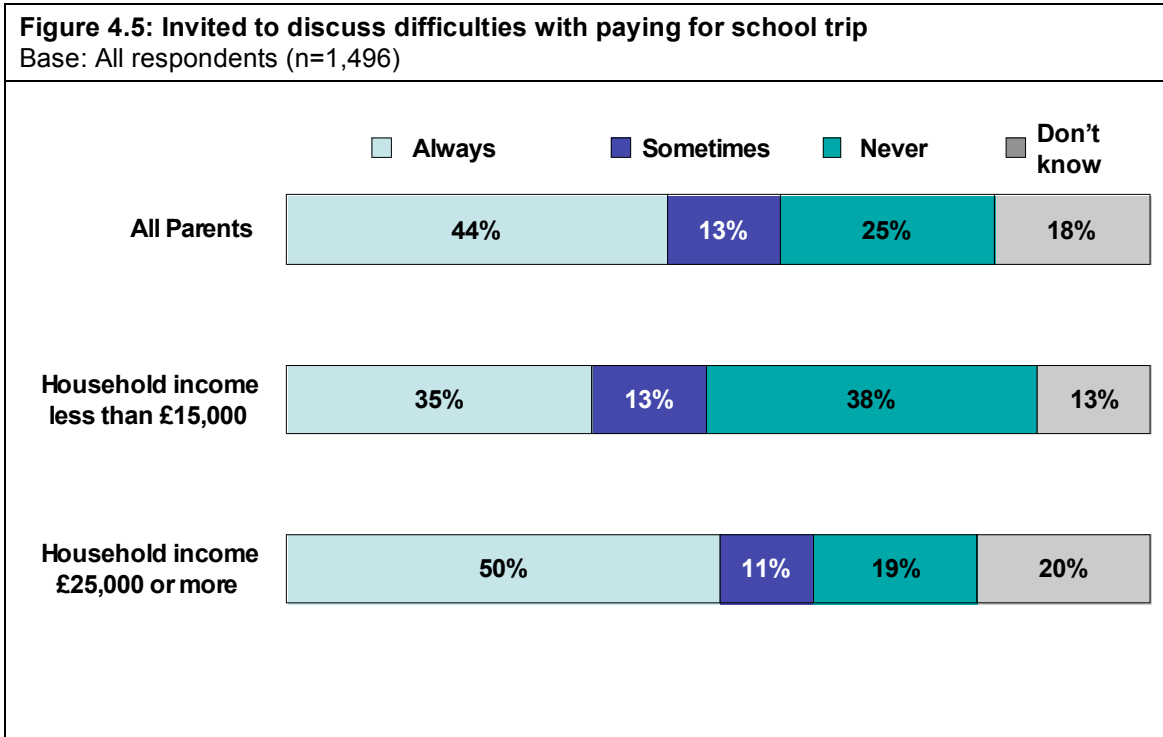
Parents/carers whose child went on the most recent trip they were asked to pay for were asked what they thought would happen if they were unable to afford to pay for the trip. Over one in three parents/carers (36 per cent) believed the school would cover the cost of the trip. However 44 per cent believed that their child would be unable to go on the trip if they could not pay.



The idea that schools would cover the cost for parents/carers who could not afford to pay for trips was more prevalent among parents/carers of primary schoolchildren (42 per cent) than secondary schoolchildren (28 per cent). However this again could be related to the type of trip parents/carers were asked to pay for most recently. For example only 20 per cent of parents/carers asked to pay for residential trips most recently said the school would cover the cost (compared to 40 per cent) those asked to pay for a day trip most recently.

4.1.9 Assistance available for school trips

All parents/carers were then asked whether their child’s school invited parents/carers to discuss any difficulties they had with paying for school trips.



Overall 57 per cent of parents/carers believed they could discuss difficulties with paying for trips either always or sometimes.

There were some interesting (and statistically significant) sub group differences. Parents/carers with a household income of £25,000 or more were more likely to say that they could discuss difficulties with the school (62 per cent) than parents/carers with a household income of less than £15,000 (48 per cent). Indeed parents/carers with a household income of less than £15,000 were twice as likely to say they were never invited to discuss difficulties as those with a household income of £25,000 or more. The conclusion could be drawn that it appears those least likely to be able to afford school trips are also those least likely to be aware of the opportunity to talk about help available.

Those with three or more children at state school were slightly more likely to say they could discuss difficulties in with paying for trips all or some of the time (63 per cent) than those with two children (59 per cent) or one child (53 per cent). Again these differences are statistically significant. This may suggest that schools are targeting those parents/carers with more children in terms of letting them know about help available.

4.2 Schools survey

Schools were asked to list all the trips they had organised in the last year and record whether they were compulsory or not, whether they were part of the curriculum or not, whether the trip was day or residential, whether instalments were offered and how much each trip cost.

4.2.1 Profile of trips – primary and secondary schools

Table 4.2 : Profile of school trips – Schools survey
Base = All School Trips (1723)

	Primary	Secondary
	%	%
Compulsory		
Yes	34	20
No	40	62
Don't know	26	18
Curriculum		
Yes	62	53
No	14	26
Don't know	25	20
Type of trip		
Day	57	41
Residential	17	39
Don't know	26	20

Overall, among primary schools over a third (34 per cent) of trips were deemed compulsory compared to one in five (20 per cent) of secondary school trips. Primary school trips were also more likely to be part of the curriculum (62 per cent) compared to secondary school trips (53 per cent).

Looking at the profile of trips in more detail, for primary schools 41 per cent of day trips were deemed compulsory compared to 26 per cent of residential trips. Trips offered by urban LEA primary schools were more likely to be curriculum based than those offered at rural primary schools (65 per cent and 55 per cent).

Among secondary schools, a higher proportion of trips offered by urban LEA schools were deemed to be compulsory - 21 per cent compared to 16 per cent of trips offered at rural LEA schools. A higher proportion of day trips were compulsory (32 per cent) than

residential trips were (eight per cent). There was no difference in terms of the profile of school trips between urban and rural secondary schools, although a higher proportion of trips offered by large secondary schools (over 1000 pupils) were regarded as curriculum based than in secondary schools with less than 1000 pupils (63 per cent v. 45 per cent).

In terms of the types of trips offered (day or residential), a higher proportion of trips offered at urban primary schools were day trips (60 per cent) compared to rural primary schools (52 per cent). Primary schools with more than 500 pupils were most likely to offer residential trips (31 per cent of trips offered).

4.2.2 Whether instalments available

Schools were also asked to list for each trip they recorded whether or not instalments were offered to parents/carers or guardians.

Instalments were allowed in 48 per cent of trips for primary schools and 49 per cent of trips for secondary schools. In contrast for 21 per cent of primary school trips and 22 per cent of secondary school trips, instalments were not offered. A third (31 per cent) of trips for primary schools and 29 per cent of trips for secondary schools did not record this information.

In terms of the likelihood of instalments being offered for different types of trips, for primary schools 52 per cent of day trips and 82 per cent of residential trips allowed payments to be made in instalments. For secondary schools instalments were offered for 35 per cent of day trips and 84 per cent of residential trips.

In primary schools where more than 20 per cent of pupils qualify for free school meals instalments were allowed for 49 per cent of trips and not allowed for 13 per cent of trips. In primary schools with less than 20 per cent of pupils qualifying for free school meals instalments were allowed for 47 per cent of trips and not allowed for 24 per cent of trips.

In secondary schools with a higher proportion of pupils qualifying for free school meals, opportunities to pay by instalments for school trips were more common than in schools with a lower proportion of pupils qualifying for free school meals (56 per cent compared to 48 per cent).

Overall, these figures were higher than those found in the parents/carers survey discussed earlier. Thirty-nine per cent of parents/carers said they were offered the opportunity to pay for the most recent school trip by instalments. Over half (53 per cent) of parents/carers said they were not offered any opportunity to pay in instalments.

In terms of differences between the different types of trips parents/carers were asked to pay for, 29 per cent of those who were asked to pay for a day trip most recently said they were offered the opportunity to pay by instalments compared to 78 per cent who were asked to pay for a residential trip. Although a similar difference was found in the schools results, still the number of parents/carers who said they were offered the opportunity to pay in instalments is lower than the number of schools who say they offer instalments. This perhaps suggests a problem in the way schools are communicating whether the fact payment by instalment is allowed or not.

4.2.3 Average cost of trips - day and residential

Schools were asked to record the cost of each trip and the results analysed by the type of trip (day or residential). The results are shown in the table below.

Table 4.3 : Average cost of trips – schools survey
Base = All school trips (1723)

	Average cost
	£
Primary	
Day (n=582)	7.17
Residential (n=74)	42.14
Secondary	
Day (n=196)	12.97
Residential (41)	48.85

It should be pointed out however there were a huge number of “not stated” responses in terms of costs of the trip therefore the base size for which the average costs were worked out (particularly for residential trips) are quite small. This should be borne in mind when assessing the results.

Day trips offered by primary schools with more than 20 per cent of pupils qualifying for free school meals cost on average £5.81 compared to £7.67 for those trips offered by primary schools with less than 20 per cent of pupils qualifying for free school meals. There was a similar finding for residential trips but the base size is too small to analyse with any degree of confidence. Day trips offered by urban primary schools were on average more expensive (£7.35) than those offered by rural primary schools (£6.73). Similarly residential

trips offered by urban primary schools were also more expensive than those offered by rural primary schools – but again the small base size means this cannot be analysed.

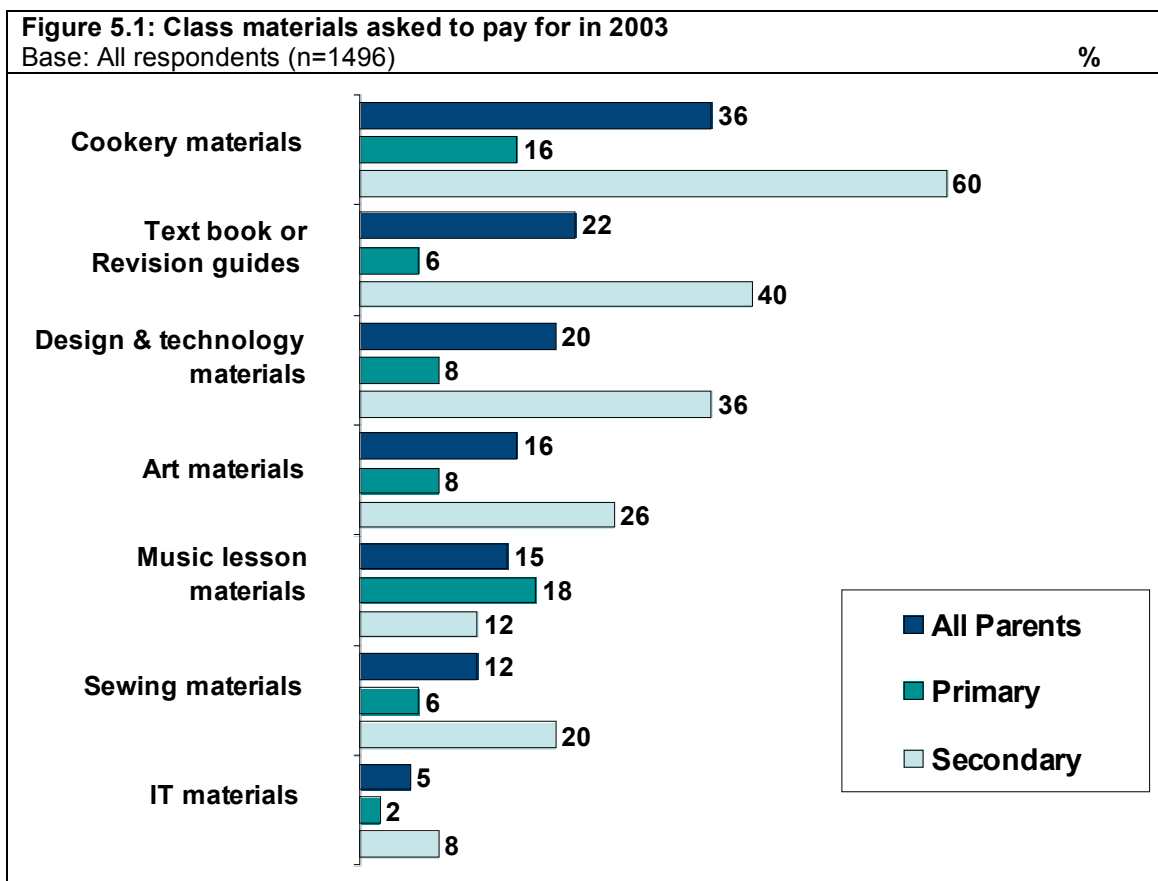
For secondary schools, the average cost of day trips offered by faith schools was more expensive (£17.65) than non faith schools (£12.23). For residential trips the base size of schools giving costs for trips was too low for further analysis to be carried out.

5 Class materials

5.1 Parents/carers survey

5.1.1 Whether parents/carers have to provide class materials

Parents/carers were asked whether they had to contribute to class materials for their child for six different lessons (music, cookery, IT, art, design and technology and sewing). Overall three in five parents/carers (61 per cent) were asked to contribute to class materials on behalf of their child. There was clear difference between primary and secondary schools with this. Less than half (47 per cent) of parents/carers of primary schoolchildren had to contribute to class materials compared to 79 per cent of parents/carers of secondary school pupils. The chart below shows the proportion of parents/carers who had been asked to pay for materials for each of the six subject areas in 2003.



The most likely lesson parents/carers of primary schoolchildren were asked to pay for was music lessons (18 per cent), followed by cookery (16 per cent).

Parents/carers of children at secondary school were most likely to be asked to pay for cookery ingredients (60 per cent), text books or revision guides (40 per cent), materials for design technology (36 per cent) and art lessons (26 per cent).

5.1.2 Average cost of class materials

Those who stated they had been asked to pay for class materials in 2003 were then asked about a number of these costs (selected at random). Time constraints with the questionnaire meant parents/carers were only asked the amount they paid for a maximum of three types of class materials (if they had stated being asked to pay for more than three).

Parents/carers were asked how much and how often they were asked to contribute towards materials and from this data the annual costs were calculated¹.

The cost assumptions made were based on class materials being needed throughout the school year. Unfortunately time constraints with the questionnaire meant the exact period during which the lesson was taken by pupils could not be asked. There was the danger of costs being artificially inflated using this process - as lessons may not take place every week for a complete year. Therefore in order to minimise the chances of this, the recalculated costs paid for class materials were capped at £200 per annum for every subject apart from Music, which was capped at £300. This reduced the chance of random *outliers* affecting the average score².

The chart overleaf shows the average annual contribution of all parents/carers who were asked about each class subject.

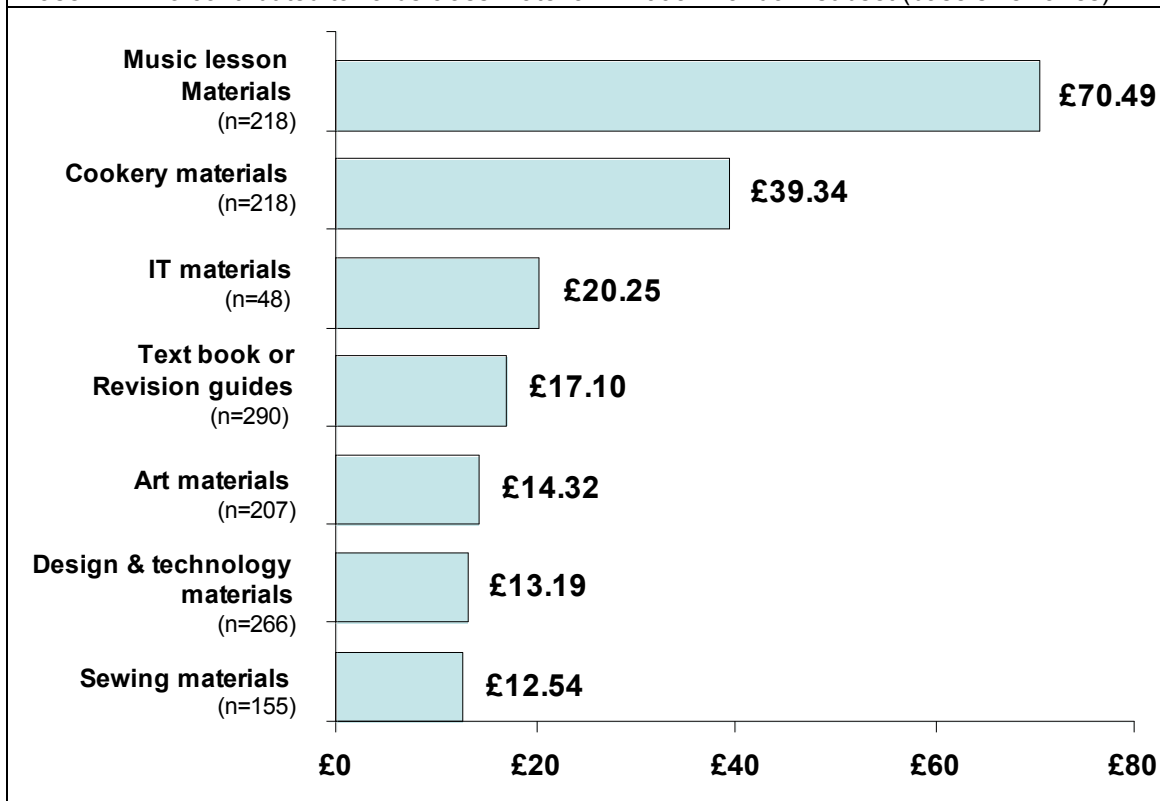
¹ Annual costs were calculated as follows:

Weekly cost multiplied by 39 (39 weeks in school year). Monthly cost multiplied by 11. Cost per Term multiplied by 3. Cost per Half Term multiplied by 6. Costs per 6 months multiplied by 2

² See Technical Appendix for further discussion of the capping issue

Figure 5.2: Amount asked to pay for class materials in 2003

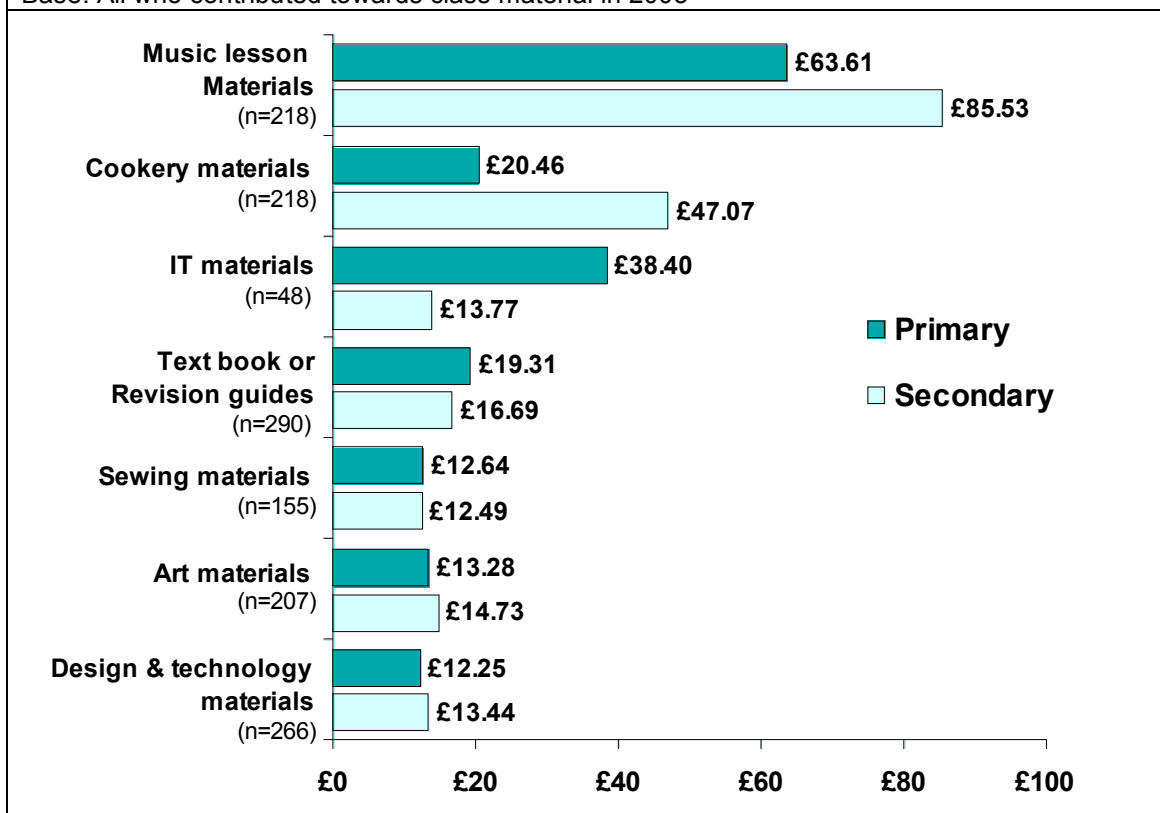
Base: All who contributed towards class material in 2003 – random subset (base size varies)



As the chart shows, average costs for class materials ranged between £12 and £20 for each subject area, with the notable exception of Music lessons which were far higher at £70.49.

A breakdown of costs between parents of primary and secondary schoolchildren is shown on the following page.

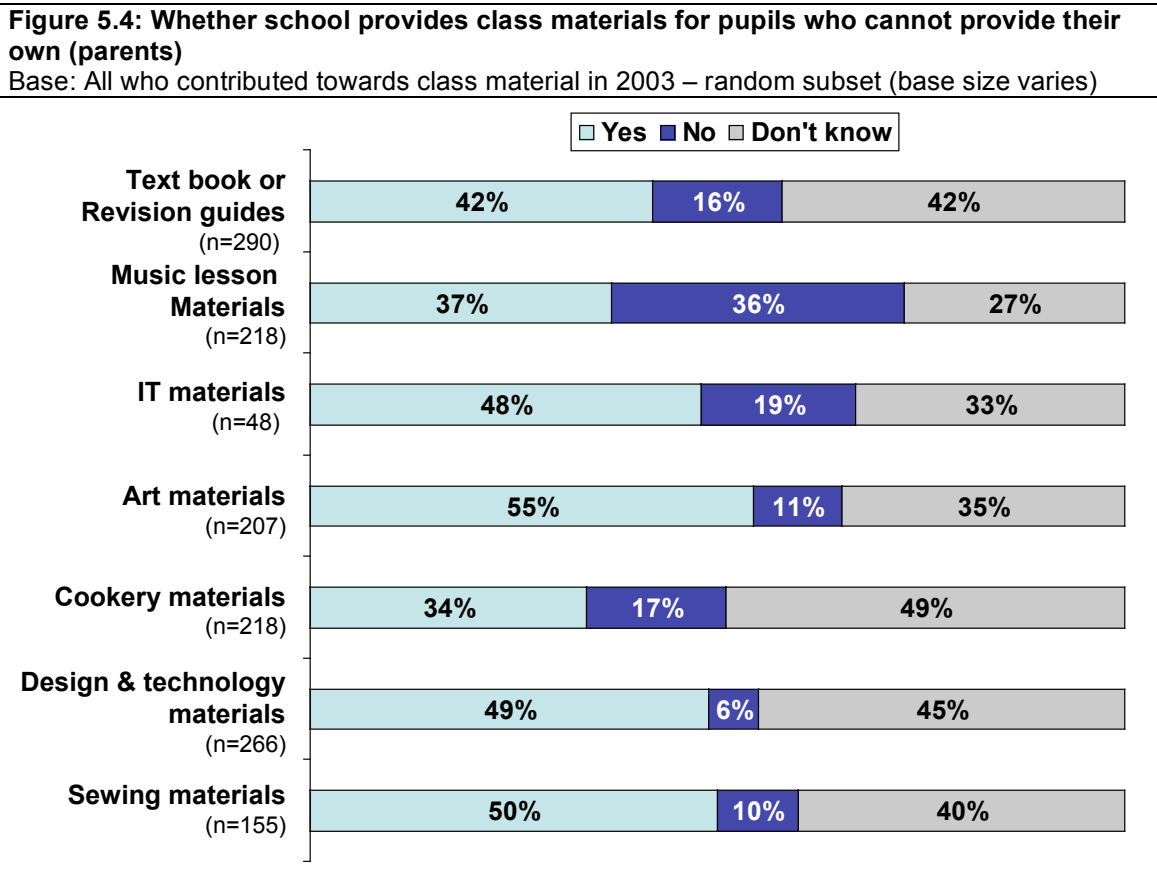
Figure 5.3: Amount asked to pay for class materials in 2003 by school type
 Base: All who contributed towards class material in 2003



At first glance there is not as much difference between the costs of class materials for primary and secondary schoolchildren as one might first expect. However, as we have seen in section 5.1.1, parents/carers of secondary school pupils are much more likely to have been asked to contribute to providing class materials. As a result the base sizes for the primary school costs are very low for each subject and thus the results should be treated with caution.

Further analysis showed 38 per cent of parents/carers paid nothing overall in terms of the class materials asked about. There was clear variation between types of school with this. Over three quarters (76 per cent) of parents/carers of primary schoolchildren paid nothing towards materials for lessons for their children. In contrast less than a quarter of parents/carers of secondary school pupil paid nothing.

Parents/carers who were asked about how much they were asked to pay towards class materials were also asked whether their child’s school provided class materials to those pupils who could not provide their own. The chart below shows the proportion of parents/carers who said that schools did provide materials for each of the class material asked about.



Around half of parents/carers said materials for sewing, art and design & technology and IT were provided by the school for pupils who couldn’t provide their own. For cookery and music the figure was nearer a third (34 per cent). Just over two in five parents/carers (42 per cent) said text books and revision guides were provided by the school.

As the chart shows there was a high proportion of parents/carers who did not know whether the school would provide materials for pupils who did not supply their own.

It is interesting to note parents/carers from households with lower annual incomes were far less likely to say that they did not know if schools supplied class materials than those from households with higher incomes. This suggests that they may have enquired about provision of class materials in their child’s school, should they not be able to provide their child with the necessary equipment.

5.2 Schools survey – departmental requirements for class materials

As part of the schools survey, schools were asked to fill out any departmental requirements they had for pupils.

The questionnaire was designed to be passed around different departments and to be filled in by heads of departments specifically regarding materials for their respective subject areas.

The areas covered were

- Humanities
- Maths
- English
- Science
- Design/Technology
- ICT
- Art & Design
- Foreign Languages
- Music

Respondents were asked to list details of materials pupils were expected to supply, such as text books, revision guides or more subject specific items (Atlas for Humanities; Dictionaries for English etc.) for each department. They were asked to record whether the item was recommended, compulsory or not required; whether the item was supplied by the school if necessary and also the approximate cost to pupils.

The small bases for each subject area (the questions on cost per item or material and whether schools provide materials if the pupils do not were filtered only on those schools requiring relevant items) should be borne in mind when assessing the results.

Secondary schools were far more likely to ask pupils to provide materials for each subject than primary, as the table below shows. The figures shown refer to the percentage of schools who, for each subject, say they have at least one item pupils are required or asked to provide.

Table 5.2 : Schools requiring provision of class materials, by type of school
Base = All schools

	Primary	Secondary	All Schools
	%	%	%
Humanities	13	61	27
Maths	17	87	38
English	16	78	34
Science	15	78	34
Design & Technology	8	61	24
ICT	5	51	19
Art	12	59	26
Foreign Languages	3	75	25
Music	21	54	31

Almost nine out of ten (87 per cent) of secondary schools said they asked pupils to provide at least one item for Maths lessons, with 78 per cent each saying that they asked pupils to provide items for Science lessons and for English lessons.

In contrast very few primary schools said they asked to provide any materials for lessons. The most likely subject they would ask for materials was Music, with 21 per cent saying they asked pupils to contribute at least one item.

The rest of the chapter looks at costs for each of the different subject areas, based on secondary school data only, given the low number of primary schools responding to the subject-based questions.

5.2.1 Humanities

Overall 61 per cent of secondary schools said they required pupils to provide materials for Humanities.

The table below shows which materials were required and whether they were compulsory or recommended. The average cost is also shown (based on all schools where item was required).

Table 5.2A : Class materials - Humanities

Base = All secondary schools (n=84)

	Compulsory	Recommended	Average price
	%	%	£
Text books (n=28)	25	12	13.05
Revision guides (n=46)	5	50	5.01
Atlas (n=23)	15	12	10.78
Average combined Humanities cost (n=50)			14.28

The average cost for Humanities materials where required was £14.28.

Other items asked for by Humanities departments included encyclopaedias and exercise books, but there were too few responses to allow for a proper analysis).

School provision

Schools were also asked whether they provided items if the pupils did not provide them. All schools (100 per cent) who required text books said they provided them if the pupils did not – despite 25 per cent of schools saying text books were compulsory. Forty-five per cent of schools supplied revision guides where needed and 89 per cent supplied atlases where needed.

Whether pupils were excluded from lessons

Schools were also asked to record whether or not pupils were excluded from lessons if they did not provide materials.

All schools where Humanities items were required said they did not exclude pupils for this reason.

5.2.2 Mathematics

Overall 87 per cent of secondary schools said they required pupils to provide materials for Maths.

The table below shows which materials were required and whether they were compulsory or recommended. The average cost is also shown (based on all schools where item was required).

Table 5.2B : Class materials - Maths

Base = all secondary schools (n=84)

	Compulsory	Recommended	Average price
	%	%	£
Text books (n=29)	25	10	14.96
Revision guides (n=60)	6	66	4.20
Geometry set (n=60)	29	43	4.88
Calculator (n=24)	18	13	7.31
Average combined Maths cost (n=74)			11.15

The average cost for Maths materials where required was £11.15.

School provision

Nearly all schools (96 per cent) who required text books said they provided them if the pupils did not. Almost half (45 per cent) of schools supplied revision guides where needed and almost the same proportion (44 per cent) supplied geometry sets where needed. Nearly two thirds (63 per cent) of schools where a calculator was required provided the equipment if the pupils did not.

Whether pupils excluded from lessons

No school where maths materials were needed said they excluded pupils who did not provide the equipment.

5.2.3 English

Over three quarters of secondary schools (77 per cent) said they said they required pupils to provide materials for English.

The table below shows which materials were required and whether they were compulsory or recommended. The average cost is also shown (based on all schools where item was required).

Table 5.2C : Class materials - English

Base = all secondary schools (84)

	Compulsory	Recommended	Average price
	%	%	£
Text books (n=34)	25	15	12.45
Revision guides (n=56)	4	63	4.78
Average combined English cost (n=64)			9.68

Other items asked by English departments included dictionaries, thesauruses and reading books, although there were too few responses to allow a meaningful analysis.

School provision

Nearly all schools (89 per cent) who required text books said they provided them if the pupils did not. Over two in five (41 per cent) schools supplied revision guides where needed.

Whether pupils were excluded from lessons

Again no school where English materials were needed said they excluded pupils who did not provide the equipment.

5.2.4 Science

Seventy-seven per cent of secondary schools said they required pupils to provide materials for Science.

The table below shows which materials were required and whether they were compulsory or recommended. The average cost is also shown (based on all schools where item was required).

Table 5.2D : Class materials - Science

Base = all schools (84)

	Compulsory	Recommended	Average price
	%	%	£
Text books (n=32)	26	15	14.30
Revision guides (n=66)	6	72	4.08
Lab. coats (n=13)	4	9	8.31
Average combined Science cost (n=66)			12.95

School provision

Nearly all schools (79 per cent) who required text books said they provided them if the pupils did not. Forty per cent of schools supplied revision guides where needed and over half (54 per cent) supplied lab. coats where needed.

Whether pupils excluded from lessons

Only one school where materials for science lessons were needed said they excluded pupils who did not provide the equipment. At this school the item needed was safety glasses.

5.2.5 Design & Technology

Sixty one per cent of schools said they required pupils to provide materials for Design & Technology.

The table below shows which materials were required and whether they were compulsory or recommended. The average cost is also shown (based on all schools where item was required).

Table 5.2E : Class materials – Design & Technology

Base = all schools (84)

	Compulsory	Recommended	Average price
	%	%	£
Text books (n=25)	20	12	12.03
Revision guides (n=34)	4	37	4.55
Average combined D&T cost (n=51)			9.20

Other items required by Design & Technology departments included aprons, cookery ingredients and money for materials, although there were too few respondents listing these requirements to allow meaningful analysis.

School provision

Nearly all schools (96 per cent) who required text books said they provided them if the pupils did not. Forty nine per cent of schools supplied revision guides.

Whether pupils excluded from lessons

Only one school where materials for Design & Technology lessons were needed said they excluded pupils who did not provide the equipment. At this school the equipment required included revision guides, aprons and materials.

5.2.6 ICT

Over half (51 per cent) of secondary schools said they required pupils to provide materials for ICT.

The table below shows which materials were required and whether they were compulsory or recommended. The average cost is also shown (based on all schools where item was required).

Table 5.2F : Class materials – ICT

Base = all schools (84)

	Compulsory	Recommended	Average price
	%	%	£
Text books (n=22)	20	9	11.95
Revision guides (n=32)	3	34	3.82
CDs/disks (n=25)	10	22	4.46
Average combined ICT cost (n=43)			11.42

School provision

Nearly all schools (94 per cent) who required text books said they provided them if the pupils did not. Almost half (47 per cent) of schools supplied revision guides where needed. Nearly two-thirds of schools (64 per cent) supplied disks or CDs where needed.

Whether pupils excluded from lessons

No schools where materials for ICT lessons were needed said they excluded pupils who did not provide the equipment.

5.2.7 Art

Fifty-nine per cent of secondary schools said they required pupils to provide materials for Art lessons

The table below shows which materials were required and whether they were compulsory or recommended. The average cost is also shown (based on all schools where item was required).

Table 5.2G : Class Materials – Art
Base = all secondary schools (84)

	Compulsory	Recommended	Average price
	%	%	£
Text books (n=18)	12	8	13.53
Revision guides (n=14)	1	15	5.35
Paper (n=21)	22	4	7.24
Pencils (n=35)	26	14	2.41
Brushes (n=25)	20	12	4.91
Average combined Art cost (n=49)			11.75

Other items asked by Art departments (but were too few in number to analyse properly) included paint, clay and sketch or drawing books.

School provision

Nearly all schools (82 per cent) who required Art text books said they provided them if the pupils did not. Thirty five per cent of schools supplied revision guides where needed. Ninety two per cent supplied paper, 81 per cent supplied pencils and 84 per cent supplied brushes where these items were needed.

Whether pupils excluded from lessons

Only one school where materials for art and design lessons were needed said they excluded pupils who did not provide the equipment. At this school the item required was pencils.

5.2.8 Foreign languages

Almost three quarters of secondary schools (74 per cent) said they required pupils to provide materials for foreign language lessons.

The table below shows which materials were required and whether they were compulsory or recommended. The average cost is also shown (based on all schools where the items were required).

Table 5.2H : Class materials – Foreign languages

Base = all secondary schools (84)

	Compulsory	Recommended	Average price
	%	%	£
Text books (n=29)	25	12	11.60
Revision guides (n=43)	5	49	3.99
Dictionaries (n=50)	20	41	5.31
Average combined Foreign Languages cost (n=61)			13.05

School provision

Ninety-two per cent of schools who required language text books said they provided them if the pupils did not. Thirty-eight per cent of schools supplied revision guides where needed and 69 per cent supplied dictionaries where needed.

Whether pupils excluded from lessons

No schools said they excluded pupils who did not provide the relevant equipment.

5.2.9 Music

Almost half (54 per cent) of secondary schools said they required pupils to provide materials for Music lessons.

The table below shows which materials were required and whether they were compulsory or recommended. The average cost is also shown (based on all schools where item was required).

Table 5.21 : Class materials – Music
Base = all secondary schools (84)

	Compulsory	Recommended	Average price
	%	%	£
Text books (n=21)	14	14	12.13
Revision guides (n=24)	3	24	7.73
Instrument costs (n=25)	12	21	27.95
Sheet music (n=21)	13	13	15.08
Average combined Music cost (n=42)			16.42

School provision

Eighty two per cent of schools who required text books said they provided them if the pupils did not. Forty per cent of schools supplied revision guides and 62 per cent supplied sheet music where needed. Three-fifths (61 per cent covered) instrument costs where any were needed.

Whether pupils excluded from lessons

Fourteen per cent of schools (six in total) where materials for music lessons were needed said they excluded pupils who did not provide the equipment. At these schools a whole range of materials were required, including text books, instrument hire costs and sheet music.

Extra curricular music lessons

Eighty of the 84 secondary schools said they provided extra-curricular music lessons (the remaining 4 did not answer the question). Over a quarter of schools (27 per cent) said these lessons were free to all pupils, 36 per cent said there was a charge to some pupils and 35 per cent said there was a charge to all pupils.

6 Stationery items

6.1 Stationery items to be provided- Parents/carers survey

Parents/carers were asked which items of stationery they were expected to provide for their child.

A list of stationery items was drawn up and the sample split into two, with half being asked about the items in loop 1 and half being asked those in loop 2. Time constraints meant not every item could be asked of all respondents.

The list used is shown below.

LIST 1	
Exercise books or paper	1
Pencils	2
Notebooks	3
Calculator	4
LIST 2	
Ruler	5
Geometry set (including protractor, angled rulers)	6
Pens	7
Pencil case	8

The chart below shows the overall proportion of parents/carers who were asked to supply these items, as well as the proportions for parents of primary and secondary schoolchildren.

Figure 6.1: Proportions of parents asked to provide stationery items, by type of school
 Base: All respondents – random subset (n=761)

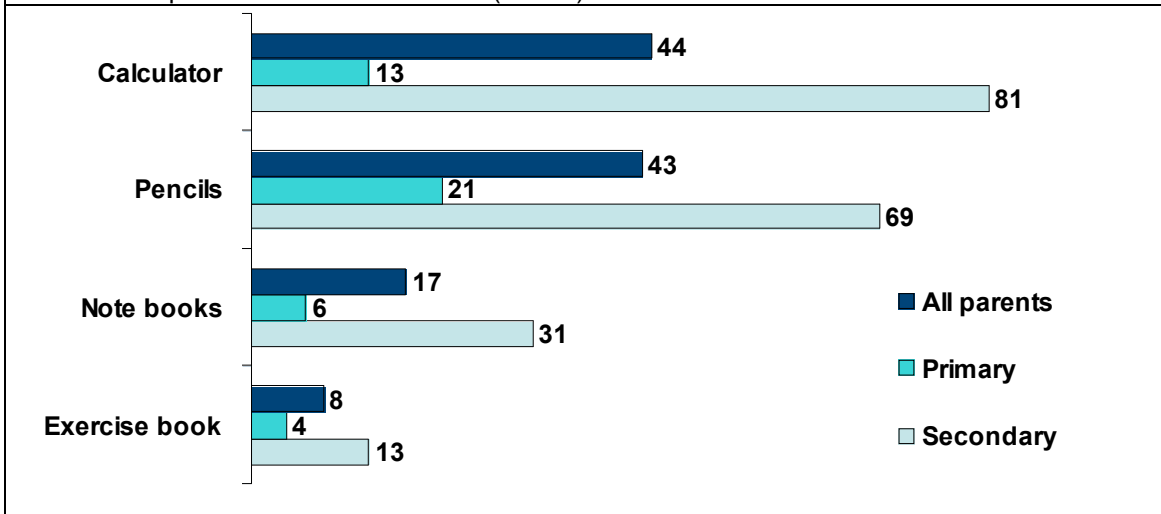
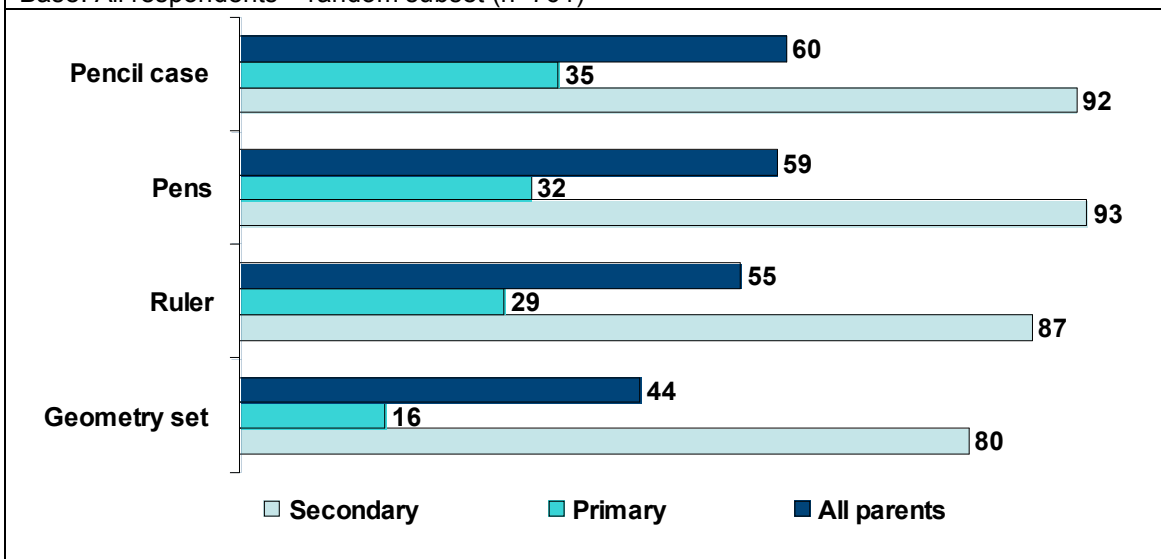


Figure 6.2: Proportions of parents asked to provide stationery items, by type of school
 Base: All respondents – random subset (n=761)



The items parents/carers were most commonly asked to provide were pencil cases, pens and rulers. Well over four out of five parents/carers of secondary school pupils were asked to provide these items. In general being asked to provide stationery items was far less likely for primary schools pupils than for secondary.

6.2 Stationery items to be provided – schools survey

Schools were given a list of stationery items and asked which the schools provided and which pupils had to provide, to give an idea of what each child was expected to buy.

The list asked of schools differed slightly from those asked of parents/carers, again to balance the constraints of time and space available with covering the whole spectrum of items across both questionnaires. Schools were not asked about exercise books or pencil cases, but rubber was included in the list. Some items such as geometry set were included in other sections of the schools questionnaire. The other items were the same as for the parents/carers survey.

The table below shows which items pupils were expected to provide for both primary and secondary schools. The average cost per item to parents was asked only of schools where pupils were asked to provide the relevant item and, given the low base sizes for primary schools, those costs are not shown.

Table 6.1 : Items of stationery provided – primary schools
Base = All primary schools (196)

	School provides	Pupils provide
	%	%
Pens	89	6
Ruler	96	1
Rubber	95	1
Pencils	94	1
Colouring pencils	94	2
Calculator	95	1
Note books	96	*

Table 6.1 : Items of stationery provided – secondary schools

Base = All secondary schools (84)

	School provide	Pupils provide	Average cost per item (£)
	%	%	
Pens	1	87	3.52
Ruler	8	81	1.79
Rubber	5	85	1.51
Pencils	7	82	2.26
Colouring pencils	11	76	3.26
Calculator	17	63	5.80
Note books	75	18	3.38

Average costs from the schools data were higher than costs calculated from the parents/carers survey. This may have been the result of some schools misinterpreting the question and recording costs to the school itself rather than to individual parents.

7 Swimming lessons

7.1 Parents/carers survey

Overall, 12 per cent of parents/carers reported being asked to pay for swimming lessons in 2003. There was a marked difference between the different types of school. Whereas only four per cent of parents/carers of secondary school aged children reported being asked to pay for swimming lessons, 18 per cent of parents/carers of primary schoolchildren did.

Swimming is part of the national curriculum in years 4, 5 and 6 and parents/carers with children in these school years were more likely than parents/carers in most other years to have been asked to pay for lessons (16 per cent, 17 per cent and 20 per cent respectively). The group of parents/carers most likely to be paying for swimming lessons, however, was those with children in year 3 (27 per cent).

Parents/carers were asked how much and how often they were asked to contribute towards swimming lessons and these responses were used to calculate the annual costs.¹ The cost assumptions made were based on swimming lessons being taken throughout the school year. Unfortunately time constraints with the questionnaire meant the exact period during which swimming lessons were taken by pupils could not be asked and there was therefore a possibility of costs being artificially inflated using this process. In order to minimise the chances of this, the recalculated costs for swimming lessons were capped at £200 per annum. This reduced the chance of random *outliers* affecting the average score².

□ The average annual amount paid by parents/carers was £55.66 in 2003.

However the actual range of amounts paid was quite wide. Twenty per cent of respondents, who were asked about contributions towards swimming lessons, stated they were asked to pay less than £20 in 2003. Conversely, 28 per cent said they were asked to contribute £70 or more.

In relation to annual household income, respondents from households earning £35,000 or more had an average contribution of £81 in 2003, compared to £59 for respondents from households earning less than £15,000 per annum.

¹ Annual costs were calculated as follows:

Weekly cost multiplied by 39 (39 weeks in school year). Monthly cost multiplied by 11. Cost per Term multiplied by 3. Cost per half term multiplied by 6. Costs per 6 months multiplied by 2.

² See Technical Appendix for further discussion of the capping issue

When asked whether the school would cover the cost of swimming lessons for pupils who could not pay, 40 per cent of parents/carers said the school did, 19 per cent said the school did not and 41 per cent said they did not know.

There were statistically significant differences in terms of income. Those with lower annual household incomes were more likely to say that there was no help available. Of respondents from households earning less than £15,000 per annum, 38 per cent stated there was no assistance available, while only 12 per cent of respondents from households earning £15,000 or more said the same.

7.2 Schools survey

Schools were asked whether they provided swimming lessons. Primary schools were more likely to have provided swimming lessons than secondary schools (71 per cent v 30 per cent) which is likely to be as a result of the national curriculum requirement for years 4, 5 and 6 to have swimming lessons.

One in eight primary schools (12 per cent) and 36 per cent of secondary schools said they did not provide any swimming lessons. Seventeen per cent of primary schools and 28 per cent of secondary schools did not answer the question.

Of those schools who provided swimming lessons, secondary schools were more likely to provide free lessons than primary schools (80 per cent v 60 per cent). However it should be pointed out the secondary school figure is based only on 26 schools who said they provided lessons.

For primary schools over one fifth of school providing swimming lessons said they charged all year groups (21 per cent). Sixteen per cent said they charged some year groups only.

Schools who charged some or all year groups for the lessons were then asked how much per child, per lesson. Given only one secondary school said they charged pupils only primary school data has been reported on.

- For primary schools charging every year group (n=36) the average cost per lesson was £2.77. The median cost was £2.00
- For primary schools who only charged some year groups (n=23) the average cost per lesson was slightly lower at £2.44 and the median cost was £1.50

If we assume one lesson per child per week for the whole of the school term (39 weeks), the average cost to parents/carers for swimming lessons at primary school (according to

schools themselves) was around £100 (£99.72 average price for schools charging all pupils, £87.84 for schools charging some year groups). This is considerably more than the average calculated from the parent's survey (£54.51).

8 School fund

8.1 Whether parents/carers were asked to contribute to school fund

Around a third (34 per cent) of parents/carers had been asked to contribute to a school fund. It was more common for parents/carers of children at secondary school to be asked for such contributions than for primary school parents/carers (41 per cent compared to 29 per cent). Parents/carers on higher incomes were also more likely to say that they had been asked for school fund contributions than those on lower incomes as the table below shows.

Table 8.1 : Whether parents/carers were asked to contribute to school fund
Base = all parents (1496)

	Total	Less than £15,000 pa	£15,000- £24,999 pa	£25,000 - £34,999 pa	£35,000 pa +
Base	1496	382	289	282	358
	%	%	%	%	%
Yes	34	29	31	34	45
No	65	71	68	65	55
Don't know	1	*	1		-

8.2 Amount parents/carers contributed to the school fund

Parents/carers were asked how much and how often they were asked to contribute towards the school fund and data the annual costs were calculated from this information.¹

On average, those who contributed to the school fund paid £25 a year. Of those who could give a figure, 64 per cent contributed less than £20 a year, but a small proportion (five per cent) said that they contributed £100 or more annually.

As shown in the table overleaf, parents/carers with children at secondary school tended to contribute more, on average, than those with primary schoolchildren (£28 compared to £22), and parents/carers with higher incomes contributed more than those on lower incomes (see table 8.2 below). Parents/carers of boys tended to contribute more than

¹ Annual costs were calculated as follows:

Weekly cost multiplied by 39 (39 weeks in school year). Monthly cost multiplied by 11. Cost per Term multiplied by 3. Cost per Half Term multiplied by 6. Costs per 6 months multiplied by 2

parents/carers of girls (£30 compared to £20), but this is due in part to the fact that five boys' parents/carers contributed large sums (£200+) whereas no girls' parents/carers did so. The median cost difference between boys and girls is less (£14 compared to £10).

Table 8.2: Annual contribution to school fund

Base = All Parents/carers giving figure (395)

	Total	Household income			Child Gender	
		Less than £15,000	£15,000- £34,999	£35,000+	Male	Female
<i>Base</i>	395	90	141	125	212	183
	%	%	%	%	%	%
Less than £5	19	26	18	14	18	21
£5-£19.99	45	47	50	40	43	48
£20-£39.99	18	18	16	22	19	17
£40 - £99.99	12	7	12	16	14	11
£100+	5	3	3	7	6	3
Average	£25.32	£18.34	£21.11	£34.75	£30.06	£19.83

The median cost was much lower than the average - £12.

8.3 Whether schools asked for contribution

Schools were asked whether they asked parents/carers for a contribution to the school fund. If this was the case they were then asked how much was asked of parents/carers to contribute, what the money was used for and whether the payment was compulsory for parents/carers or not.

8.4 Number of schools that asked for contribution

Just under two in five schools said they asked parents/carers for a voluntary contribution towards the school fund (39 per cent). This matches quite closely with the findings from the parents/carers survey where 34 per cent said they had to contribute.

Looking at the differences between the two types of school, 35 per cent of primary and 50 per cent of secondary schools asked for a voluntary contribution to school fund. This compares to findings from the parents/carers survey of 29 per cent of primary and 41 per cent of secondary schools asking for a voluntary contribution.

Sixty-five per cent of foundation schools asked for a voluntary contribution to school fund (however only 17 were included in the overall sample and so any results from this sub group must be treated with caution). Voluntary aided schools were the next most likely category of school to have asked for voluntary contributions to the school fund (56 per cent) compared to 33 per cent of community and 31 per cent of voluntary controlled.

Faith schools were more likely to ask for a voluntary contribution to school fund (47 per cent) compared to non-faith (35 per cent).

There was no significant difference in terms of likelihood of asking for a voluntary contribution to school fund between schools in urban and rural areas.

8.5 Amount schools asked parents/carers to contribute to school fund

Twenty two primary schools who asked parents/carers for a contribution to the school fund gave usable information. Based on these 22 schools the average cost asked for, in terms of contribution to school fund annually, was £51.61.

This is slightly higher than the average calculated from the parents/carers survey (£25.32)

Seventeen secondary schools who asked parents/carers for a contribution to school fund gave usable information. Based on only these 17 schools, the average amount asked for was £17.20.

The small base size achieved in the schools survey means comparison on this issue is not reliable.

Schools were also asked how often contributions to the school fund were requested. Table 8.2 shows the responses.

Table 8.2 : How often schools requested contributions to the school fund
 Base = all schools asking for contributions to the school fund (105)

	Primary (n=69)	Secondary (n=36)
	%	%
Yearly	7	52
Per Term	16	10
Per half term	1	-
Quarterly	-	4
Per Month	2	-
Per week	10	-
Once only	-	5
As required	15	3
Other	18	6
Not Stated	31	19

Seven per cent of primary schools asked for school fund annually. One in six (16 per cent) asked for school fund each term, with 15 per cent asking only when required.

In contrast secondary schools were most likely to for school fund once a year. Over half the schools surveyed (52 per cent) said they asked parents/carers annually.

8.6 What the school fund was used for

Those schools asking for school fund were then asked what the school fund was used for.

The table below shows the responses.

Table 8.1 : What school fund was used for
Base = all schools asking for school fund (105)

	Primary (n=69)	Secondary (n=36)	Overall (n=105)
	%	%	%
To support school trips	72	68	70
To support school events	66	46	61
To contribute to the cost of school equipment	54	48	54
To provide books for school library	38	8	28
To support school sports	21	32	26
To contribute to the cost of additions to school buildings	12	11	12
To provide uniforms and equipment for children from more deprived families	1	27	11
To contribute to the cost of school maintenance	6	13	9
Insurance	4	2	4
Other	13	19	16

For primary schools the most popular uses of school fund were to support school trips (72 per cent) and support school events (66 per cent). Half the schools (54 per cent) said they used the school fund to contribute to the cost of school equipment. Only one per cent of primary schools said school fund was used to provide uniform and equipment for children from more deprived families.

For secondary schools the school fund is most likely to be used for supporting school trips (68 per cent) and towards the cost of school equipment (48 per cent). A quarter (27 per cent) did say it was used to provide uniforms and equipment for children from more deprived families.

8.7 Consequences of parents/carers being unable to pay for school fund

Schools were also asked what happens when parents/carers are unable to pay for school fund.

Fourteen per cent of primary schools said there would be fewer trips, or trips would have to be cancelled. Sixteen per cent said the PTA fund would make up the difference. Five per cent said there would be fewer extra curricular activities. One in five primary schools (23 per cent) said there would be no repercussions for the children.

Twelve per cent of secondary schools said there would be fewer trips or that trips would have to be cancelled. Seven per cent said there would be fewer extra curricular activities. Twenty-two per cent said there would be no repercussions for children.

9 School lunch

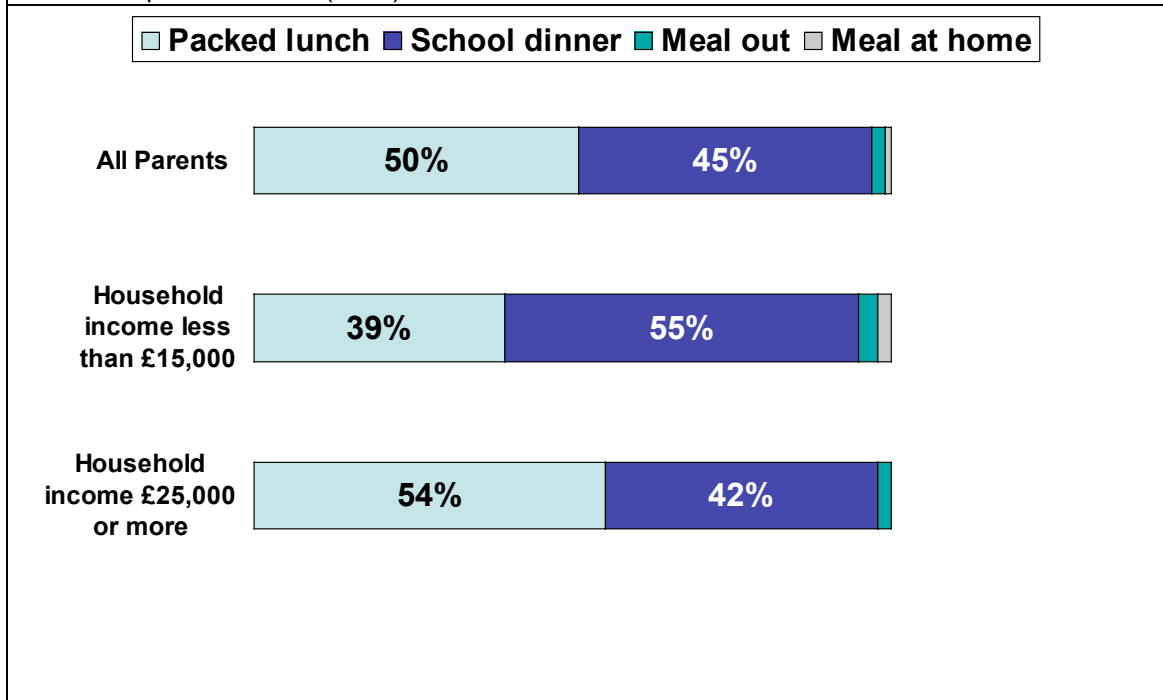
9.1 Options available and taken for school lunch

Parents/carers were first asked what type of meal their child usually had at school. Half of the children usually took a packed lunch to school, and 45 per cent had a school dinner. At primary school most children had a packed lunch (55 per cent) and 43 per cent had school dinner. By secondary school, the proportion having a packed lunch had fallen (42 per cent), and there was a slight increase in the number having school dinners (48 per cent). However, at secondary school, one in 20 children (five per cent) had a meal out, and two per cent went home for lunch (these options were very uncommon at primary school level).

Packed lunches were more prevalent among children of higher income parents/carers. However, this may be due to the fact that some children of low income families will be eligible for free school meals.

Figure 9.1 What type of meal child has during school

Base = all parents/carers (1496)



Schools were asked what options were available for pupils for lunch at the school.

As the table below shows, almost all schools (81 per cent) offered packed lunch provision (either facilities for pupils to bring their own lunch or provided by the school). A set menu lunch was offered by (56 per cent) of schools and a canteen was offered by 44 per cent. In total, nine per cent of schools offered pupils the chance to go off site for their dinner.

Table 9.1 : School meals – options available for school meal
Base = all schools (280)

	All	Primary (n=196)	Secondary (n=84)
	%	%	%
School meal - set menu	56	68	28
School meal - canteen	44	23	94
Packed lunch	81	85	74
Off-school (e.g. allow to go to food outlet off-site)	9	5	18
Not stated	1	1	1

There were differences in the provision of school meals between both primary and secondary. Secondary schools were more likely to offer canteen style school dinners (94 per cent) and to allow meals to be bought off site (18 per cent).

A school canteen and the chance to eat off site were also more likely to be offered by larger schools. For example, 94 per cent of schools with 1000+ pupils offered a school canteen compared to 19 per cent of schools with 100 or fewer pupils.

9.2 Reasons for children not having a school dinner

Parents/carers whose children did not usually have a school meal were then asked the reasons why.

The most common reason for not having school dinner was because the child preferred to take their own food (55 per cent). Fifteen per cent of parents/carers felt that school dinners were too expensive, and 10 per cent said that school dinners were not healthy. Ten per cent also said that their child wanted to eat with friends who had similar lunch arrangements.

Eight per cent of parents/carers said that school meals were not actually provided (even though it is a statutory requirement for schools to provide a school meal). All these respondents had children in primary school.

9.3 Typical cost of meals - parents/carers survey

All parents/carers were asked how much they typically spent on meals during the school day (including school meals, packed lunches, meals off site, meals at home etc.) and how often they paid this figure and from this data the average daily costs were calculated¹.

Most parents/carers said the cost of meals during the school day was between £1 and £2.49 on a daily basis. The average cost was £1.66 (this figure includes those who were eligible for free school meals - the average paid by parents excluding those eligible for free school meals for meals during the day was £1.80).

Based on data from all parents (including those who were eligible for free school meals), meals for secondary school pupils tended to cost slightly more than for primary schoolchildren (£1.92 on average compared to £1.46). There was also a slight gradation in cost by income (from £1.36 for parents/carers on less than £10,000 pa to £1.85 for parents/carers on £50,000+ pa).

Parents/carers whose child qualified for free school meals often still paid something towards meals - this was principally because not all of those children eligible for a free school meal actually took it up – see section 9.5.

9.4 Typical cost of meals – Schools survey

Those schools who offered either fixed menu or canteen school meals were then asked the cost of a typical school meal at the school and also how much was allowed for a free school meal².

Table 9.2 : Cost of school meal – Schools survey

Base = All Schools offering either a set menu or canteen school meal (245)

	Primary	Secondary	All Schools
	£	£	£
Average cost of school meal	1.45	1.53	1.47
Average amount offered for free school meal	1.42	1.50	1.46

¹ Daily costs were calculated as follows: Weekly cost divided by 5. Monthly cost divided by 20. Cost per term divided by 60 (12 weeks per term, 5 days per week). Cost per half term divided by 30 (6 weeks per half term, 5 days per week).

² Costs of packed lunches provided by schools were not asked as the questionnaire did not differentiate between packed lunches bought by pupils and packed lunches supplied by schools themselves

As table 9.2 shows, average costs for school dinners were consistent across both primary and secondary schools. The average cost of a meal according to schools (£1.47) was slightly less than the typical cost paid for by parents/carers whose child had a school meal (£1.56), although parents and schools were not matched.

9.5 Free school meals

The statutory requirements for provision of free school meals are as follows.

“Local Education Authorities or, where the budget for school meals is delegated to them, a school's governing body have a duty to provide free school lunches to eligible pupils. Free school lunch eligibility is limited to children whose parents receive: Income Support; Income Based Jobseekers Allowance; support under part VI of the Immigration and Asylum Act 1999; or Child Tax Credit, provided they do not also receive Working Tax Credit and have an annual income (as assessed by the Inland Revenue) that does not exceed £13,480”

DfES figures for 2002/3 show that 14.9 per cent of secondary schoolchildren and 17.4 per cent of primary children were eligible for free school meals. The results of this survey showed broadly similar findings; 17 per cent of parents/carers of a primary schoolchild said that they were eligible for free school meals, as did 10 per cent of secondary school parents/carers.

Obviously there was a strong link to household income. Single parents/carers were far more likely to have a child eligible for free school meals than two parent families (32 per cent compared to five per cent). Children from black and minority ethnic backgrounds were also slightly more likely to be eligible (25 per cent compared to 13 per cent).

However, not all those eligible for free school meals actually take up their free school meals.

Table 9.3 : What type of meal child has during school – eligible for free school meal only
Base = all parents/carers whose child eligible for free school meal (206)

	Primary (n=140)	Secondary (n=66)	All (n=206)
	%	%	%
Packed lunch	32	18	28
School dinner	66	75	69
Meal at home		5	2
Packed lunch and school dinner	1		1
Other	*	1	*

The most popular reason why children who are eligible for free school meals but do not have one was that the child prefers another option i.e. to take their own food, eat at home or eat out. Over two thirds (67 per cent) of parents whose child was eligible for a free school meal but did not have one said this was the reason why. Eight per cent of parents whose child was eligible for a free school meal but did not have one said they did not have a school meal because they considered them not to be healthy. A further eight per cent of parents whose child was eligible for a free school meal but did not have one said school dinners were not available in their school (even though they were eligible for a free school meal – presumably a free alternative was offered by the school in these cases).

A breakdown of costs paid by those eligible for free school meals shows us that under half (47 per cent) said they spent nothing on their child's dinner at school. A further 15 per cent said they spent under £1. However, the remaining 38 per cent said they spent over £1 a day on school dinner despite being eligible for free school meals. There are, of course, numerous explanations as to why a free school dinner option is not taken. The fact other choices are preferred for school dinner is clearly a factor as we have already seen. Potential differences between schools in terms of the organisation of free school meals may also play a role - which the next section examines.

9.6 Organisation of free school meals

The schools who offered canteen or set menu school meals were asked about the organisation and administration of free school meals¹. A list of options as to how school meals were organised was given and schools asked to indicate which ones applied to them.

Table 9.4 shows the results.

¹ The question was not asked of schools who said they only provided a packed lunch service. If schools only offered a packed lunch as their free school meal provision then their answers were not included.

Table 9.4 : Organisation of Free school meals

Base = all schools who offer either a canteen or set menu school meal (245)

	Primary (N=165)	Secondary (n=80)	Overall (n=255)
	%	%	%
Parents/carers invited to apply via letter from school	50	33	44
Process detailed in prospectus given to parents/carers	48	41	46
Left to parent to initiate - no advertising as such	10	10	10
LEA provide information	43	57	49
Informally e.g. parents evening	20	9	17
Don't know	1	1	1
Not stated	4	3	3

Ten per cent of primary schools and 10 per cent of secondary schools said it was left to the parent to initiate applying for a free school meal.

Fifty per cent of primary schools and 33 per cent of secondary schools invited parents/carers to apply via a letter sent from the school. Forty-eight per cent of primary and 41 per cent of secondary schools said details were included in a prospectus given to parents/carers.

Just under half of schools (43 per cent) of primary schools and 57 per cent of secondary schools said the local LEA provided the information.

10 Travel

10.1 Method of transport used to take children to school

The two most common ways for children to get to school were walking (48 per cent of children walk to school) and car (28 per cent go by car). A further 12 per cent used public transport and one in ten (nine per cent) went on a dedicated school bus. A few children cycled (one per cent) or went by taxi (one per cent). There were no differences between boys and girls.

There are some differences by type of school. Primary schools tend to be more local, and so, not surprisingly a greater proportion of children walked to their primary school (56 per cent compared to 38 per cent of secondary schoolchildren). Cars are also more commonly used to transport primary schoolchildren (35 per cent compared to 20 per cent). Secondary schoolchildren are more likely to use public transport (22 per cent compared to four per cent) or a school bus (17 per cent compared to two per cent).

Parents/carers on higher incomes were more likely to drive their child to school, and less likely to let their child use public transport.

Table 10.1 : Method of transport to school
Base = all parents/carers (1496)

	Household income				Type of school	
	Total	Less than £15,000	£15,000- £34,999	£35,000+	Primary	Secondary
	1496	382	571	358	822	673
	%	%	%	%	%	%
Walk	48	48	52	44	56	38
Cycle	1	1	2	1	1	2
Taxi	1	1	1	*	*	1
Car	28	26	27	34	35	20
School bus	9	6	9	10	2	17
Public transport	12	18	9	10	4	22

10.2 Who pays for travel costs?

The law requires that Local Education Authorities provide free travel to pupils who live more than three miles from the nearest suitable secondary school (two miles for primary

school). Most of the parents/carers whose child travelled by public transport, taxi or school bus did pay themselves (64 per cent), but a quarter (23 per cent) said that the LEA paid, eight per cent said the school paid and four per cent said the council paid (presumably meaning the LEA).

The bases were small, but it appears as though parents/carers on higher incomes were less likely to pay for their child's travel than those on lower incomes. This trend is also seen by social grade, with those of higher social grades being less likely to pay themselves than those in the lower social grades. This may be due to parents/carers in the higher social grades and on higher incomes tending to send their children to schools that are further from home (if these schools appear to be "better" than closer schools) rather than just automatically using the nearest school.

Table 10.2 : Who pays for travel costs?

Base = all whose child usually travels by public transport, taxi or school bus (318)

	Total	Household income	
		Less than £25,000	£25,000 or more
Base	318	150	121
	%	%	%
Parent/carer pays	64	69	56
LEA/council pays	26	19	35
School pays	8	9	8
Other	2	3	1

Parents/carers were asked how much they paid towards travel to and from school and how often they paid. Weekly costs were calculated using this information.¹

The average amount paid by those parents/carers who pay for their child to travel to school by public transport, bus or taxi was £7.29 a week. This did not vary much by school type or household income. Around two-fifths of parents/carers (41 per cent) paid between £4 and £6 a week, but a significant minority (22 per cent) were paying over £10 a week for travel.

¹ Weekly costs were calculated as follows: Daily cost multiplied by 5. Monthly cost divided by 4. Cost per Term divided by 12. Annual costs divided by 39. Per journey costs were multiplied by 10.

11 Other expenditure

Other items of possible expenditure were then covered, including school photographs, contribution to charity events and other school activities such as jumble sales or raffle prizes.

For the parents/carers surveyed the sample was split into three, with a third being asked about charity events, a third being asked about school photographs and the remaining third asked about contributions to other events.

For the schools survey, each school was asked to record details of school photographs and charity days organised.

11.1 School photographs

11.1.1 Parents/carers survey

A third of respondents in the parents/carers' survey were asked whether their child had any school photographs taken in 2003. Overall, 64 per cent of parents/carers reported that their child had photographs taken. A higher proportion of primary schoolchildren had photographs taken in 2003 than secondary schoolchildren (78 per cent compared to 49 per cent).

All parents/carers who said their child had school photographs taken in 2003 were asked how much they were asked to pay. The overall average cost was £15.71

There was no difference between primary and secondary school pupils, as the table below shows.

Table 11.1a : Average cost of School Photographs in 2003

Base = All whose child had school photographs done in 2003 - Random subset (310)

	Ave. cost of photographs in 2003 (£)
All Parents/carers	15.71
Primary	15.65
Secondary	15.84

11.1.2 Schools survey

As part of the schools questionnaire they were asked how many times school photographs were offered per year. The average number of times school photographs were offered by primary schools was 1.5 and for secondary schools it was 0.9.

Schools were also asked the price of the basic package of school photographs offered. The prices suggested by schools were much lower than the parents/carers (but the schools were asked for the price of the most *basic* package whereas parents/carers were asked what they had actually spent).

Table 11.1b : Average cost of School Photographs in 2003 - Schools
Base = All schools (280)

	Average cost of photographs in 2003 (£)
Primary Schools (n=196)	9.87
Secondary Schools (n=84)	11.08

11.2 Charity Events

Another random subset of parents/carers was asked whether they had been asked by their child's school to contribute cash or items to charity.

Overall 84 per cent of parents/carers said they had been asked. A slightly higher proportion of parents/carers of primary schoolchildren had been asked than parents/carers of secondary schoolchildren (89 per cent compared to 77 per cent).

11.2.1 How often parents were asked to contribute

All parents/carers who said they had been asked to contribute something to charity by their child's school were asked how many times they had been asked to contribute in 2003.

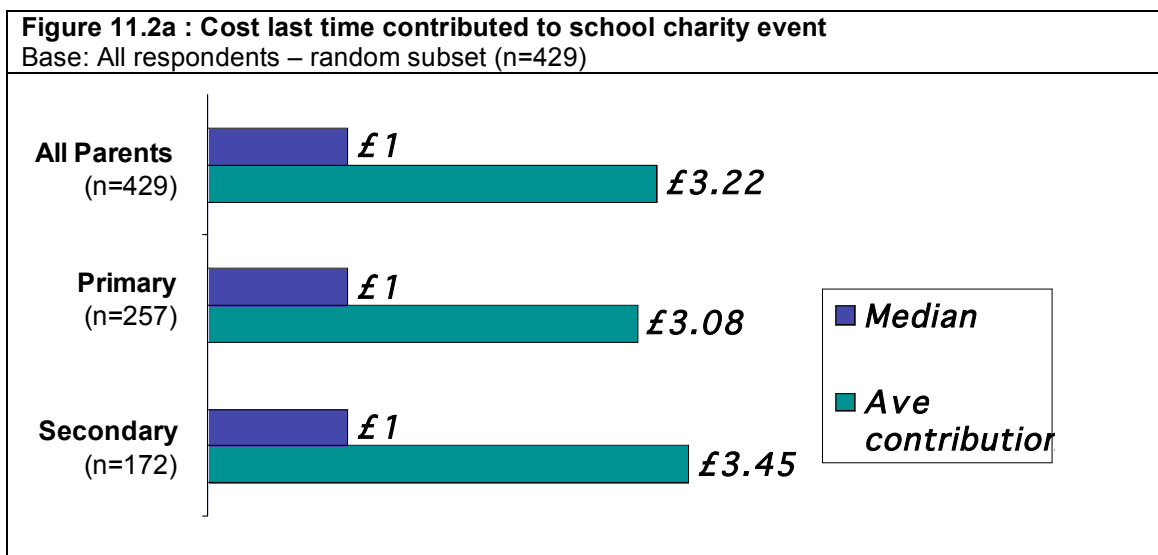
One in ten (11 per cent) said they were asked only once. Over a third (34 per cent) said they were asked twice, a quarter (25 per cent) was asked three times and 29 per cent overall said they were asked to contribute four times or more.

11.2.2 Cost of most recent request

All parents/carers who were asked to contribute something to charity were asked to approximate how much they were asked to give at the most recent request.

The overall average (mean) amount parents/carers were asked to contribute last time was about £3.22, although the median (middle) value was much lower at £1. A few cases of parents/carers paying high amounts meant the average amount rose considerably.

Figures were almost identical for primary and secondary schools as the chart below shows.



In relation to the annual household income of respondents, the median contribution made at the last request was consistently £1, though the average (mean) contribution increased with household income. Parents/carers from households earning less than £15,000 per annum contributed an average of £2.25 last time they were asked, compared to the average contribution of £4.20 of respondents from households with annual household incomes of £35,000 or more.

11.2.3 Schools survey

Schools were also asked how many times they held charity days or non uniform days in 2003.

The average number of days for primary schools was 3.2 per school, with secondary schools having a slightly higher average of 3.3.

Schools were also asked the average cost of the charity or non-uniform days per event.

- Primary school Ave cost = £0.92p
- Secondary school average cost = £1.01p

Although the costs for such events according to schools are lower than the average costs found in the parents/carers survey, they are very close to the median cost established in the parents/carers survey (£1).

11.3 Contributions to other school activities

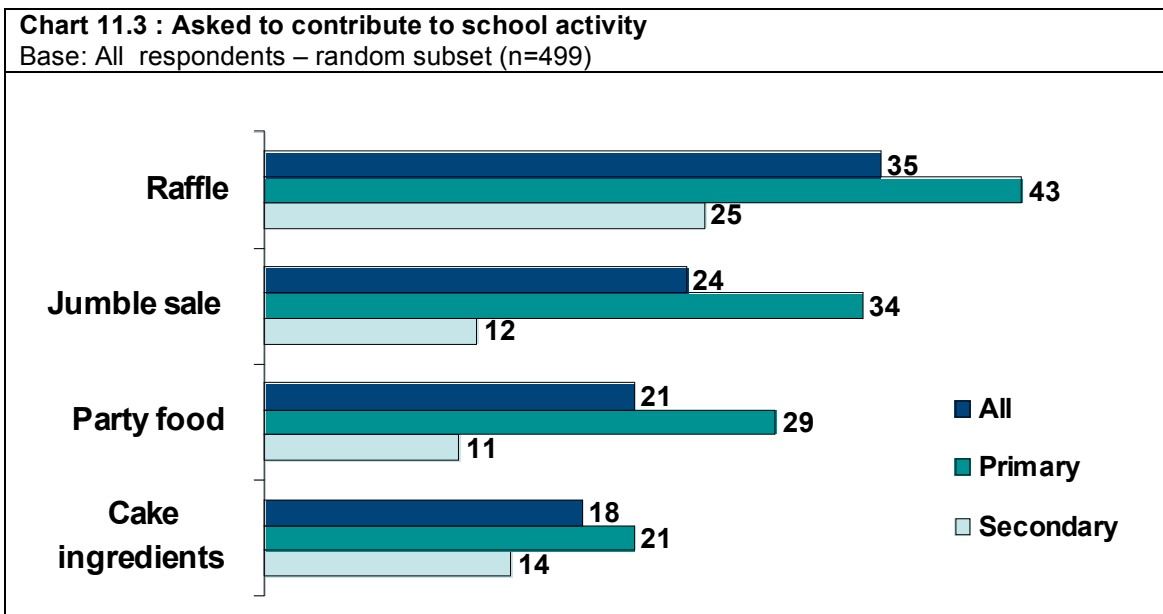
The final random subset of parents/carers was asked whether their child’s school had asked them to contribute to any other school activities that had not already been covered. These activities included items for parties, raffles and jumble sales.

Over a third (35 per cent) said they did not have to contribute to anything like this.

There was a marked difference between parents/carers from the different types of school. Over half of parents/carers of secondary school pupils (54 per cent) said they did not have to contribute anything compared to only 20 per cent of parents/carers of primary school pupils.

In total sixty-three per cent of parents/carers said they had been asked to contribute towards such an activity in 2003 (79 per cent of parents/carers of primary school pupils and 43 per cent of parents/carers of secondary).

The chart below shows the activities parents/carers said they had to contribute towards and highlights the difference between parents/carers of primary and secondary pupils/



11.3.1 Typical cost of contribution

Parents/carers who said they had contributed to a school activity in 2003 were asked how much they had been asked to contribute in total during 2003. The overall average (mean) contribution was £11.81, though the median (middle) contribution was lower than this at £6. There was little difference between primary and secondary school from the findings of the parents/carers' survey. The average amount spent by parents/carers of primary schoolchildren was £11.51 compared to £12.59 for parents/carers of secondary school pupils.

Income clearly had an influence in how much parents /carers contributed to other school activities. Those parents/carers earning the highest annual household incomes (more than £50,000) contributed an average of £20.32 in 2003 compared to an average contribution of £8.00 of parents/carers from households earning less than £10,000 per annum.

12 Attitudes towards costs of schooling

12.1 Happiness with key costs

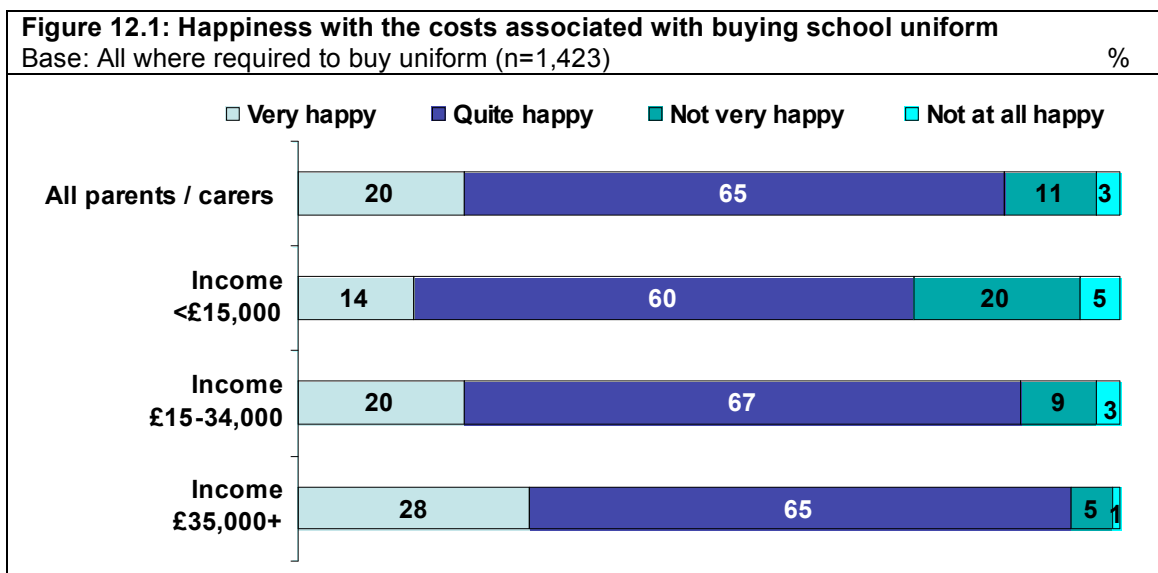
Parents/carers were asked after each section how happy they were with the costs associated with different types of items including school uniform, PE kit, school trips and class materials. Once all the different types of costs had been covered they were then asked to rate their overall happiness with the costs associated with their child's schooling.

12.1.1 Attitude towards uniform costs.

All parents/carers who said they were required to buy a uniform for their child were asked how happy they were with the cost associated with buying these items.

Overall one in five parents/carers said they were very happy with the costs associated with uniform. In contrast 14 per cent of parents/carers said they were not happy with the costs associated. However within the overall picture there were differences, particularly concerning household income sub groups.

The chart below shows overall happiness and also happiness in relation to annual household income.



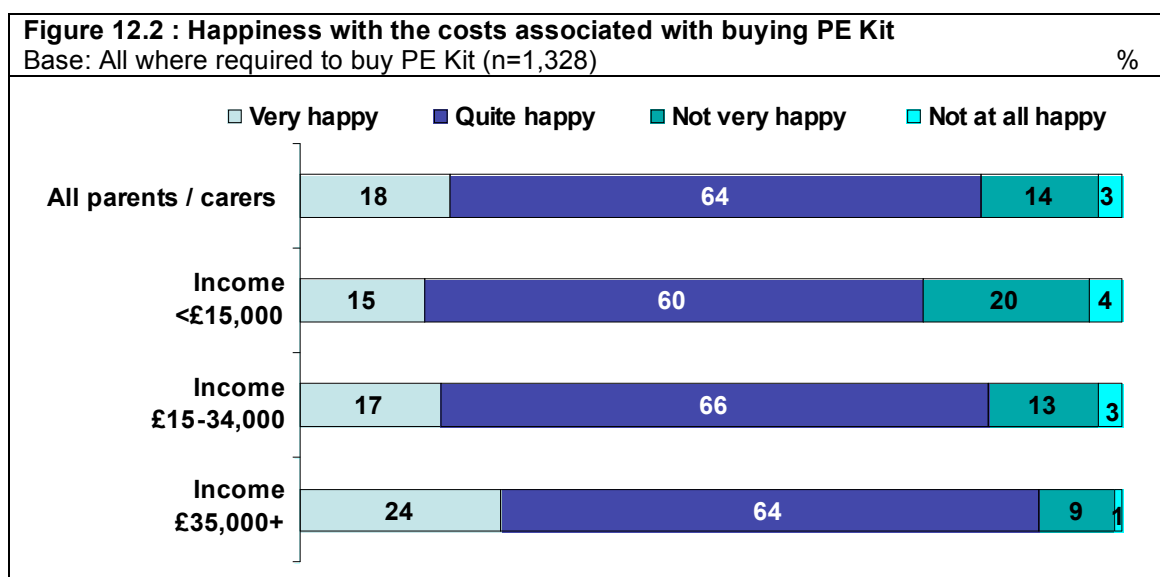
As might be expected the proportion of respondents who were unhappy with these costs was higher where their annual household income was lower. Twenty-five per cent of respondents from households earning less than £15,000 per annum said they were unhappy compared to 14 per cent of respondents with an annual household income of between

£15,000 and £34,000, and six per cent from households with an income of £35,000 or more. Parents/carers of secondary schoolchildren were marginally more likely to say they were unhappy with the costs associated with buying school uniforms (16 per cent) than parents/carers of primary schoolchildren (12 per cent). Respondents with three or more children were more likely to say they were unhappy (19 per cent) than respondents with less than three children at state school (13 per cent).

There were also some differences between school years. Parents/carers of year 7 and 8 pupils (the first two years of Secondary school) were more likely to be dissatisfied with costs for uniform compared to other years. This perhaps reflects the increased costs between primary and secondary school uniform (for male pupils a 32 per cent increase, for female pupils a 29 per cent increase).

12.1.2 Attitude towards PE kit costs

All parents/carers who had to buy their child at least one item of PE kit were asked how happy they were with the costs associated with buying PE kit.



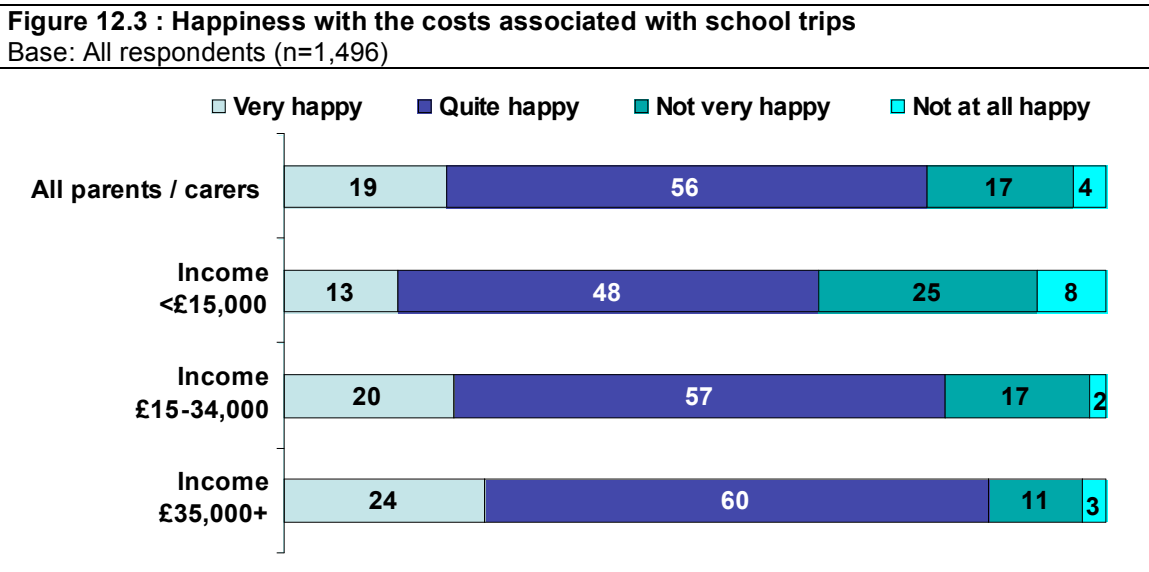
The overall proportion of parents/carers who said they were unhappy with the costs associated with buying PE kit was 17 per cent, a figure slightly higher than for school uniform. As with the costs associated with school uniform, respondents from households with an annual income of less than £15,000 were more likely to be unhappy (24 per cent) than respondents with an annual household income of £15,000 to £34,999 (16 per cent) and those with earnings above £35,000 (ten per cent).

For costs associated with PE kit, parents/carers of secondary schoolchildren were twice as likely to say they were not happy (23 per cent) than parents/carers of primary schoolchildren (11 per cent). Indeed the parents/carers of year 7 pupils (the first year of secondary school) were more likely to be dissatisfied with costs for PE kit compared to other years. This probably reflects the increased costs between primary and secondary school PE kit (for male pupils a 22 per cent increase, for female pupils an 11 per cent increase).

Unlike for happiness with school uniform, the number of children the respondent had at state school made no difference to the level of happiness.

12.1.3 Attitude towards cost of school trips

All parents/carers were asked about happiness with the costs associated with school trips.



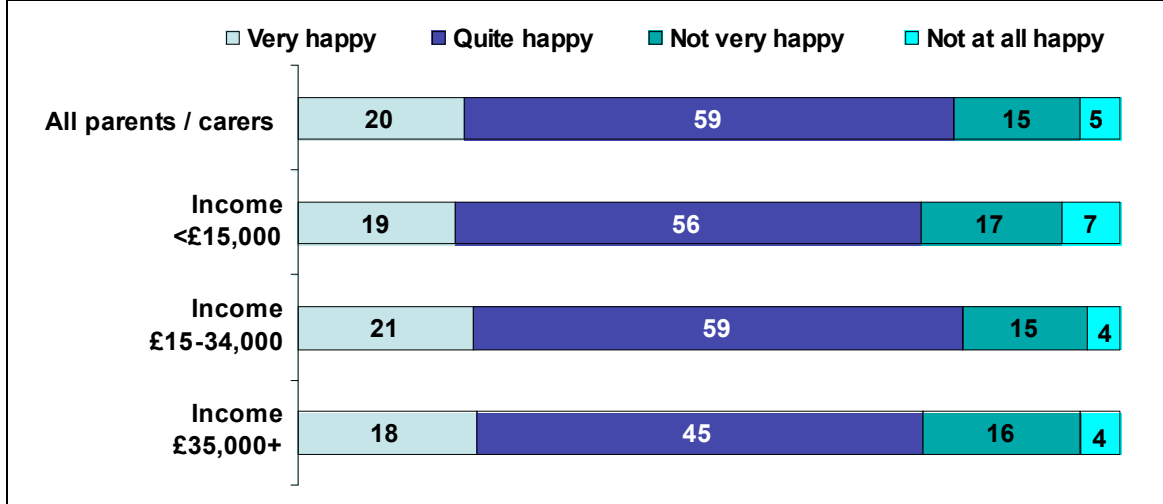
The overall proportion of parents/carers who said they were not happy with the costs associated with school trips was 21 per cent, which is slightly higher than the proportion who were not happy with the costs associated with either school uniform or PE kit. The proportion of respondents who said they were not happy increased as annual household income decreased. Where annual household income was less than £15,000, 33 per cent of respondents said they were not happy compared to 19 per cent who had an annual household income of between £15,000 and £34,999 and 14 per cent of respondents from households earning over £35,000 per annum.

Respondents with three or more children at state school were slightly more likely to say they were not happy with the costs associated with school trips (26 per cent) than those with less than three (20 per cent). A higher proportion of respondents with children at secondary school said they were not happy (24 per cent) than those with primary schoolchildren (18 per cent). This difference could, however, be attributed to the larger proportion of residential trips offered to secondary schoolchildren. Of respondents who were asked to pay for a residential trip most recently, 34 per cent said they were unhappy with the costs associated with school trips, compared to 19 per cent who were asked to pay for a day trip most recently. This should not be too surprising as the cost of a residential trip is considerably higher than the cost of a day trip.

12.1.4 Attitude towards costs of class materials

Figure 12.4 : Happiness with the costs associated with class materials

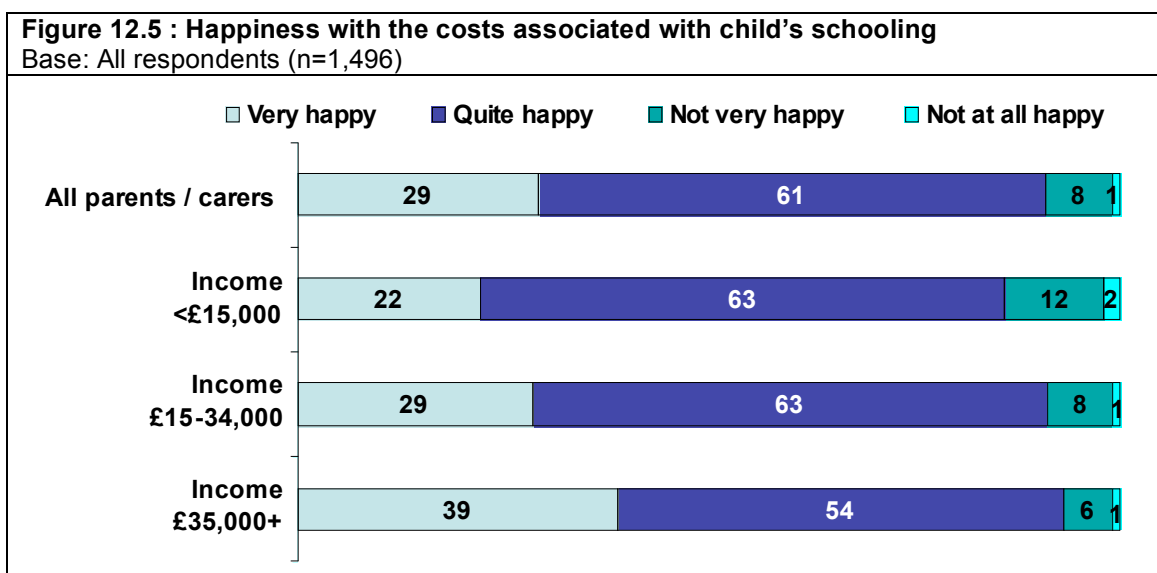
Base: All who were asked to provide class materials (n=986)



When asked how about how happy they were with the costs associated with providing materials, equipment or lessons (swimming or music), 20 per cent of respondents stated they were not happy. There was much less difference in the level of happiness in relation to the respondents' annual household income. Twenty-four per cent of respondents with a household income of less than £15,000 said they were not happy, compared to an average of 19 per cent of respondents from households earning more than £15,000.

12.1.5 Attitude towards overall costs

Parents/carers were finally asked about their overall happiness with the costs associated with their child's schooling. The chart below shows levels of happiness for all parents/carers and also by annual household income.



Overall happiness was a lot higher than the happiness associated with any one particular cost. The proportion of respondents who said they were very happy increased with annual household income and the proportion who said they were not happy decreased very slightly. Parents/carers of secondary schoolchildren were slightly more likely to say they were not happy with the costs associated with their child's schooling (12 per cent) compared to parents/carers of primary schoolchildren (eight per cent).

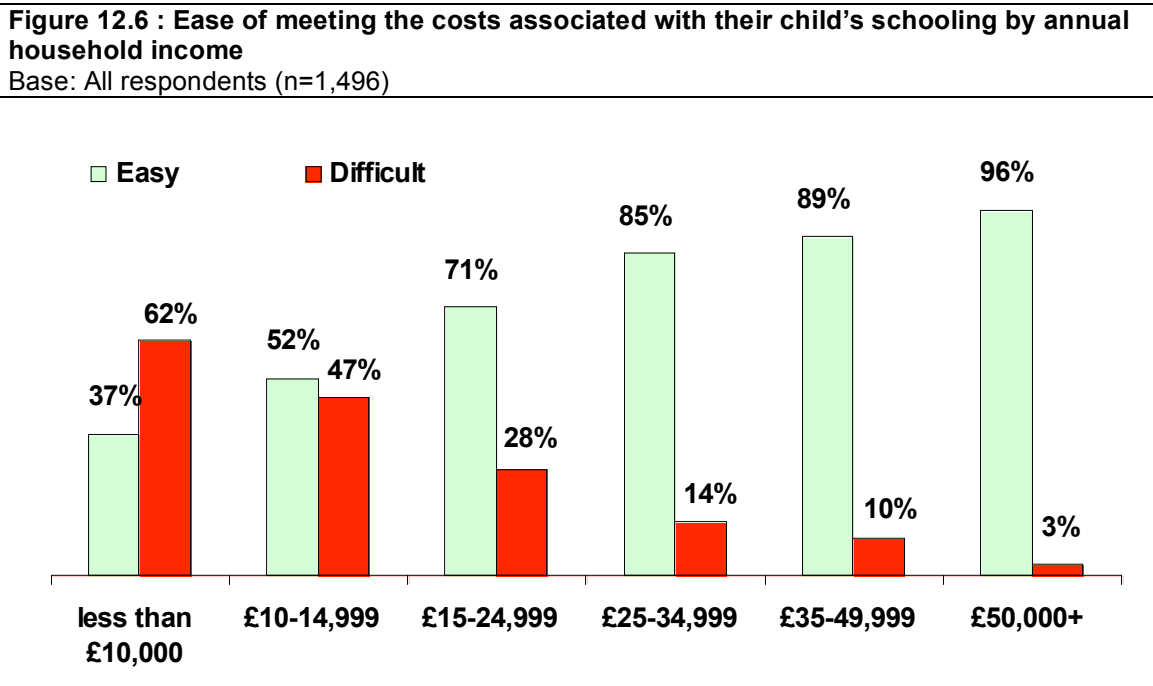
12.2 The ease of meeting costs

All respondents were asked how easy their family found it to meet the costs associated with their child's schooling. Overall 18 per cent of respondents said they found it very easy, 53 per cent said they found it quite easy, 22 per cent said they found it quite difficult and five per cent said they found it very difficult to meet the costs expected of them.

Seventy-five per cent of respondents with primary schoolchildren said they found it very easy or quite easy to meet the costs compared to 68 per cent of secondary school parents/carers. This perhaps reflects the increasing costs we have seen when looking at costs such as uniform and class materials compared between primary and secondary pupils.

Furthermore, a higher proportion of respondents with one child at state school said they found it very or quite easy (76 per cent) compared to 72 per cent with two children at state school and 58 per cent with three or more.

The chart below shows the proportion of respondents from each annual household income group who said they found it very easy or quite easy to meet costs associated with their child’s schooling.



Unsurprisingly respondents with a higher annual household income were more likely to say they found it easy to meet the costs. In contrast those on lower household incomes were more likely to say meeting the costs was difficult. Looking at the bottom two income brackets combined, over half (55 per cent) of those with a household income of £14,999 or less felt it was quite difficult or very difficult to meet the costs discussed. Of the lowest household income bracket, less than £10,000pa, the proportion who found meeting the costs difficult was 62 per cent, including 14 per cent who said they found it very difficult.

12.3 Key driver analysis

In order to probe more fully into the different factors affecting overall happiness with the cost of schooling, we carried out a programme of multivariate analysis. The main technique used was multiple regression (also known as key driver analysis, or MLR). More details of the technique are provided in the appendices.

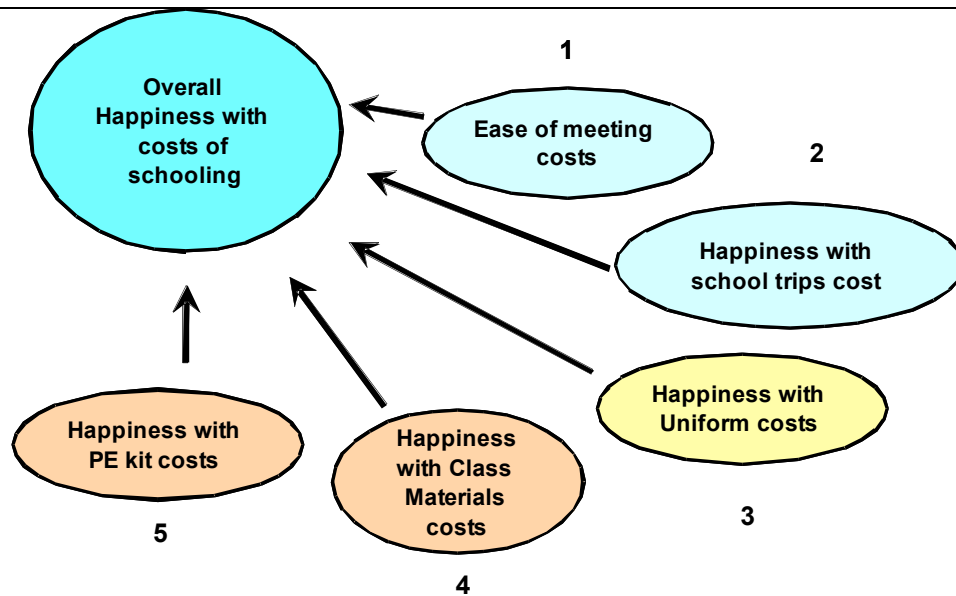
Multiple linear regression (MLR) was used to try and establish what were the key drivers in terms of **overall happiness with the costs of schooling** i.e. establishing which type of costs or factors had most influence on parents/carers overall happiness with the costs of schooling (taken from Q71).

Q71 Taking everything we have talked about into account, how happy are you with the costs associated with sending your child to state school?

Very happy	1
Quite happy	2
Not very happy	3
Not at all happy	4

The table below shows the factors we found were most likely to influence an answer to the overall happiness question – i.e. the **key drivers** of happiness with the costs of schooling.

Figure 12.1 – Key driver analysis : overall happiness with costs of schooling



How easy parents/carers found meeting the costs involved (ease of meeting costs) emerged as the biggest driver in terms of overall happiness with the costs of schooling. Happiness

with the costs of school trips was the next most important factor followed by happiness with uniform costs and happiness with the costs of class materials. Happiness with PE costs appeared to have the least effect (of all the individual items of expenditure) on overall happiness with the costs of schooling.

We also looked more closely at what factors influenced the ease of being able to meet all the costs. The following list shows which factors had the greatest influence (rank order).

- Income
- Happiness with School Trips costs
- Happiness with uniform costs
- Happiness with Class Materials costs
- Happiness with PE kit costs

Predictably household income was the largest driver, followed by the four specific costs (especially that for school trips). Other factors such as parents household tenure, whether or not the child's school pays in cases of difficulty, whether or not the child did not go on the last trip because couldn't afford it and whether parents/carers had to buy multiple pairs rugby and football boots in a year all played some part too.

Summary

To summarise, the key drivers of overall happiness with the costs of schooling are:

- The ease of meeting costs (ability to cope)
- Happiness with costs of school trips
- Happiness with costs of uniform
- Happiness with costs of class materials
- Happiness with costs of PE kit

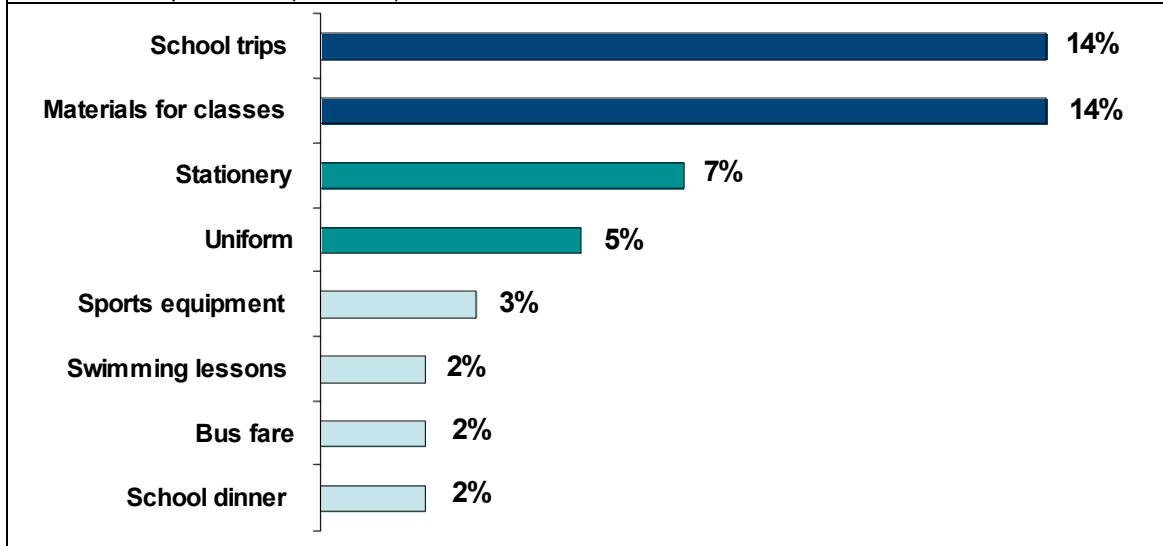
Household income and happiness with the costs of school trips, uniform and PE kit all influence this key driver of ease of meeting costs.

12.4 Attitudes towards specific costs

Parents/carers were asked whether there were any costs they felt they should not be asked to pay for. The chart below shows the proportion of parents/carers who said they do not think they should be asked to pay for each type of cost.

Figure 12.7 : Costs respondents think they should not be asked to pay

Base: All respondents (n=1,496)



Overall three in five (60 per cent) of respondents said there was no particular cost that they think they should not be asked to pay for. There was only a little variation according to annual household income with 54 per cent of respondents from households earning less than £15,000 saying there are no costs they should not be asked to pay for compared to 62 per cent of respondents from households earning £15,000 or more per annum.

A higher proportion of respondents with a household income of less than £15,000 thought that they should not be asked to pay for school trips (20 per cent) than those earning £15,000 or more (12 per cent). There was a similar finding for costs associated with buying school uniforms with eight per cent of respondents with a household income less than £15,000 thinking they should not be asked to pay for this compared to four per cent of respondents from households earning £15,000 or more.

Overall only a slightly higher proportion of respondents with children at primary school thought that there were no costs that parents/carers should be asked to pay. A higher proportion of respondents with secondary schoolchildren thought that they should not have to pay for class materials (20 per cent) than respondents with primary schoolchildren (nine per cent). This is also true for stationery items (eight per cent and five per cent respectively). This is unsurprising as parents/carers of secondary schoolchildren are more

likely to be asked to pay for these items than parents of primary schoolchildren, as shown earlier.

13 Role of pupils in passing on costs to parents/carers

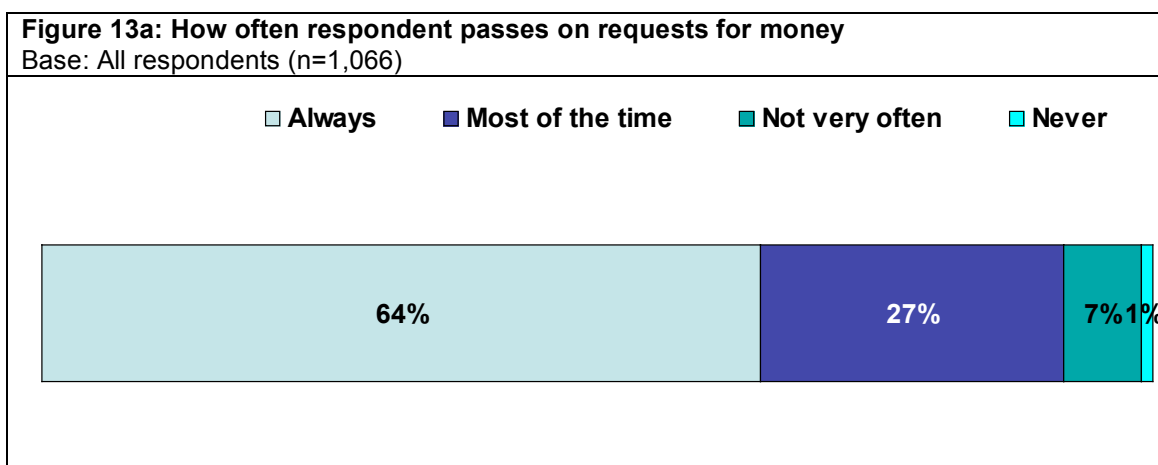
The costs of schooling discussed with parents/carers in the telephone survey were (by definition) concerned only with the costs parents/carers know they have been asked to pay. However the DfES also wanted to investigate the role pupils play in mediating what parents/carers pay or know about in terms of costs asked for by schools.

The approach taken was to ask children themselves, in a separate survey using the BMRB Omnibus survey. BMRB runs a special omnibus survey called *Access to Youth* interviewing children aged 7 to 19 and a series of questions was added onto this to explore the issue.

Young people aged ten to 16 were surveyed between 1st April and 2nd June 2004 to find out how much pupils act as gatekeepers or mediators in terms of what information is passed to parents/carers from schools. A total of 1,066 young people were interviewed. Interviews were carried out in-home, using Computer Assisted Personal Interviewing (CAPI).

13.1 Passing on requests for contributions

Respondents were asked how often they pass on letters to their parents/carers from schools requesting money for activities such as school trips or parties. The chart below shows the proportion of respondents who said they pass on letters all the time, most of the time, not very often and not at all.



Nearly two thirds of the young people interviewed said they always pass on letters from the school (64 per cent). However over a quarter said they pass letters on most of the time and a further eight per cent said they do so not very often or never do so.

Young people aged 14 to 16 were more likely to say that they pass on letters not very often or never compared to those aged 10 to 13 (11 per cent compared to six per cent). Likewise, respondents from C2, D and E social grades were more likely to say that they do not very often or never pass on letters to parents/carers than those from A, B and C1 social grades (ten per cent and six per cent respectively). In relation to household income, ten per cent of young people from households earning less than £15,000 per annum said they never pass on letters or do not pass letters on very often compared to six per cent of young people from households earning £15,000 or more annually.

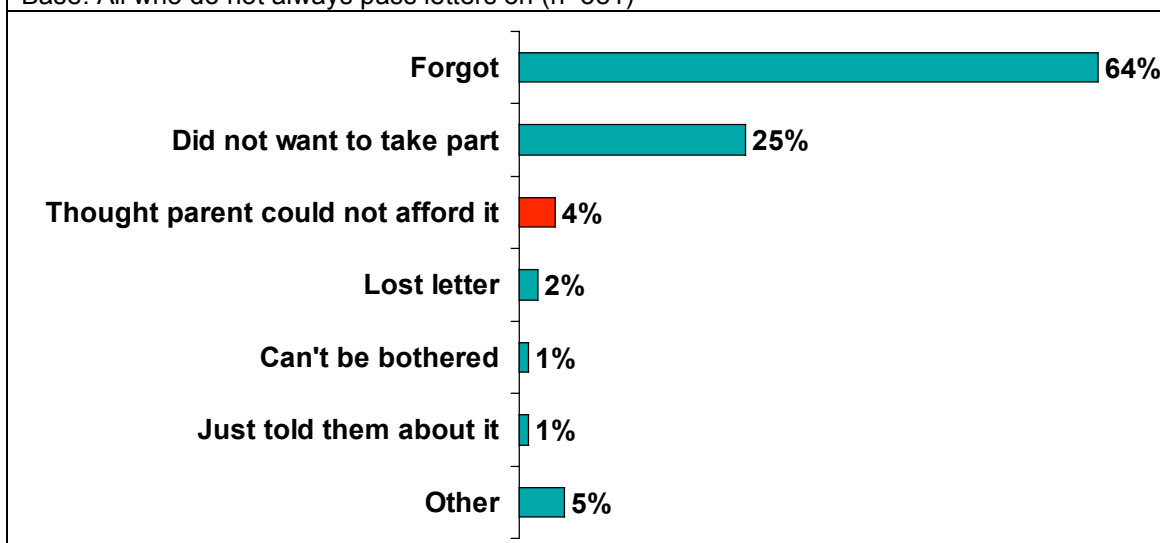
13.2 Why requests for contribution are not passed on to parents/carers

All young people who said they did not always pass on requests for payments to parents/carers from schools were then asked why they did not always pass letters on. Respondents could give more than one reason.

Simply forgetting was by far the most common reason (68 per cent), followed by the respondent not wanting to take part or go on the trip in question (29 per cent). However four per cent of children said thinking that their parents/carers could not afford the activity was at least one of the reasons for not passing requests on.

Chart 13.1: Reasons why requests for payment are not passed on

Base: All who do not always pass letters on (n=381)



Respondents from C2, D and E social grades were more likely to say they did not pass on requests for money because they thought their parents/carers could not afford it than those from A, B or C1 social grades (seven per cent compared to two per cent) with social grade E respondents the group most likely to say this (11 per cent). Similarly young people from households with a lower annual income were more likely to say they did not pass on requests for money because they thought their parents/carers could not afford it than those from households with a higher income (eight per cent where annual household income was less than £15,000 and one per cent for those with an annual income of £15,000 or more).

13.3 The consequences if parents could not afford to contribute

Young people were then asked what would happen if the school asked their parents/carers for money for something and they could not afford it. The question was open ended and so a variety of responses was received.

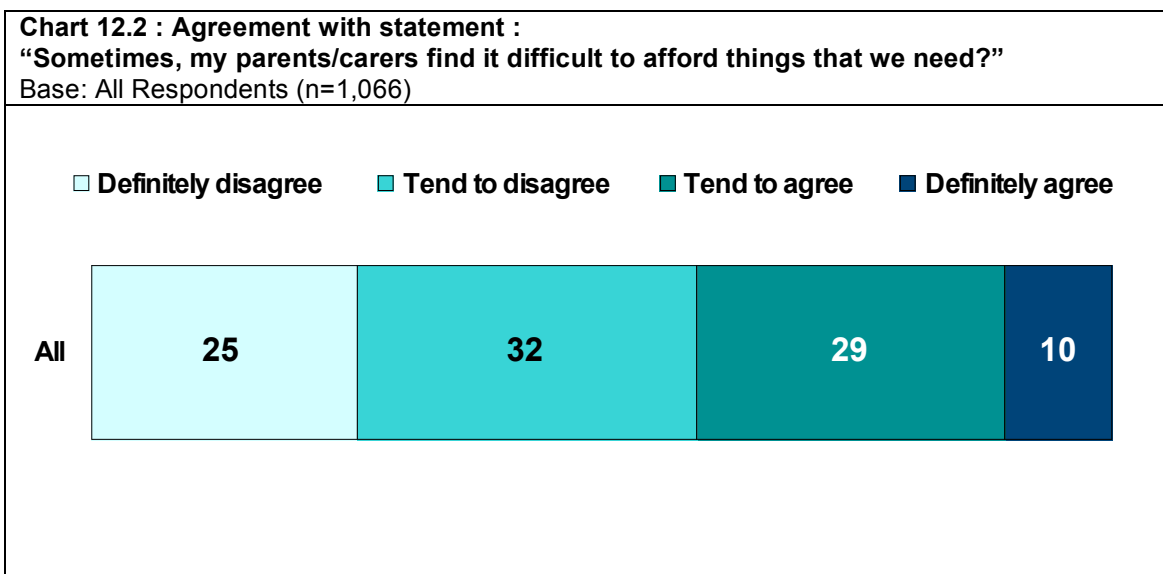
- Twenty eight per cent of children said this situation had never happened.
- Four per cent said they would tell the school that their parents/carers couldn't afford it.
- Six per cent said they would not tell their parents/carers about it.
- Eight per cent said they would say they did not want to do the activity.
- Only three per cent said the school would say it was voluntary and cover the cost.

This suggests there is a small proportion of pupils who, in cases where the school asked for payment for a trip, school party or other expense that their parents/carers couldn't afford, would not pass on the information or would claim they did not want to be involved.

13.4 Whether any difficulties in affording things needed

Children were finally asked to what degree they agreed or disagreed with the statement **"Sometimes, my parents/carers find it difficult to afford things that we need"**

The results are shown in the chart below (excluding those who replied "don't know").



Two-fifths of respondents (39 per cent) agreed to some extent that sometimes their parents/carers found it difficult to afford the things they needed. As might be expected, young people from households earning less than £15,000 annually were more likely to agree with the statement than those from households earning £15,000 or more (55 per cent and 37 per cent respectively). Agreement with the statement also differed according to the social grade of the respondent, with 47 per cent of respondents from C2, D and E expressing agreement compared to 33 per cent from social grades A, B and C1.

14 Total annual spending – Parents/carers

Having collected and examined parents’/carers’ spending on each area of potential cost (uniform, PE kit, school trips, class materials etc.), we then combined the costs given for each area and calculated the total average annual spending for each respondent on all items of expenditure associated with sending a child to state school. This total annual cost was then analysed according to the different sub groups and total average costs calculated for each group of interest.¹

Please note that the average annual costs discussed in this chapter are based upon all 1496 parents/carers involved in the survey. This means that the average costs shown in this chapter are based on all respondents and therefore include all those parents/carers who have spent nothing on a particular area of expense.

Average annual spending

The total average spending on items related to children’s state education in 2003 by parents/carers was £736.22. However there are clear differences between the costs of primary and secondary school.

Table 14.1 : Total average spending
Base = all respondents (1496)

	Total average expenditure
	£
Total (n=1,496)	736.22
Primary male (n=434)	563.81
Primary female (n=388)	562.41
Secondary male (n=345)	973.09
Secondary female (n=328)	921.84

¹Total annual costs were calculated in three stages. Stage 1 involved calculating average costs for each area of expenditure (these average costs were applied in cases where the cost was incurred but respondents could not remember the amount and answered don’t know). Stage 2 involved re-calculating all costs given to annual figures, including all cases where the question was not asked or where there were no expense for particular areas of cost. The final stage involved adding all relevant costs together to get the annual total. Please see the Technical Appendix for a more detailed discussion of how these costs were reached.

School meals was the biggest area of cost. The average amount spent by parents/carers on meals was £316.20. The table below shows the annual amount spent excluding school meals.

Table 14.1 : Total average spending
Base = all respondents (1496)

	Total average expenditure excluding school meals	Total average expenditure including school meals
	£	£
Total (n=1,496)	420.02	736.22
Primary male (n=434)	285.81	563.81
Primary female (n=388)	286.09	562.41
Secondary male (n=345)	603.18	973.09
Secondary female (n=328)	564.29	921.84

The rest of this chapter explores the total annual spending on school costs broken down by type of school, household income, social grade and eligibility of free school meals.

Primary versus secondary costs

The differences between costs for primary and secondary school pupils have been evident throughout the report and this is shown in the total annual costs calculated.

Overall spending for parents/carers of primary schoolchildren in 2003 was £563.15 compared to £948.11 for parents/carers of secondary schoolchildren. This is a difference of £384.96.

Spending on male pupils regardless of type of school attended was slightly higher than spending on girls (£745.07 compared to £726.63). However, as the table below shows, this difference was more apparent for secondary schoolchildren:

Table 14.2: Total annual spending by type of school attended and gender

	Total average expenditure
Primary male (n=434)	£563.81
Primary female (n=388)	£562.41
Secondary male (n=345)	£973.09
Secondary female (n=328)	£921.84

Household income

There was, as would be expected, a link between the total spending on costs associated with schooling and household income. Those parents/carers in the top two income brackets spent more than those with a lower household income.

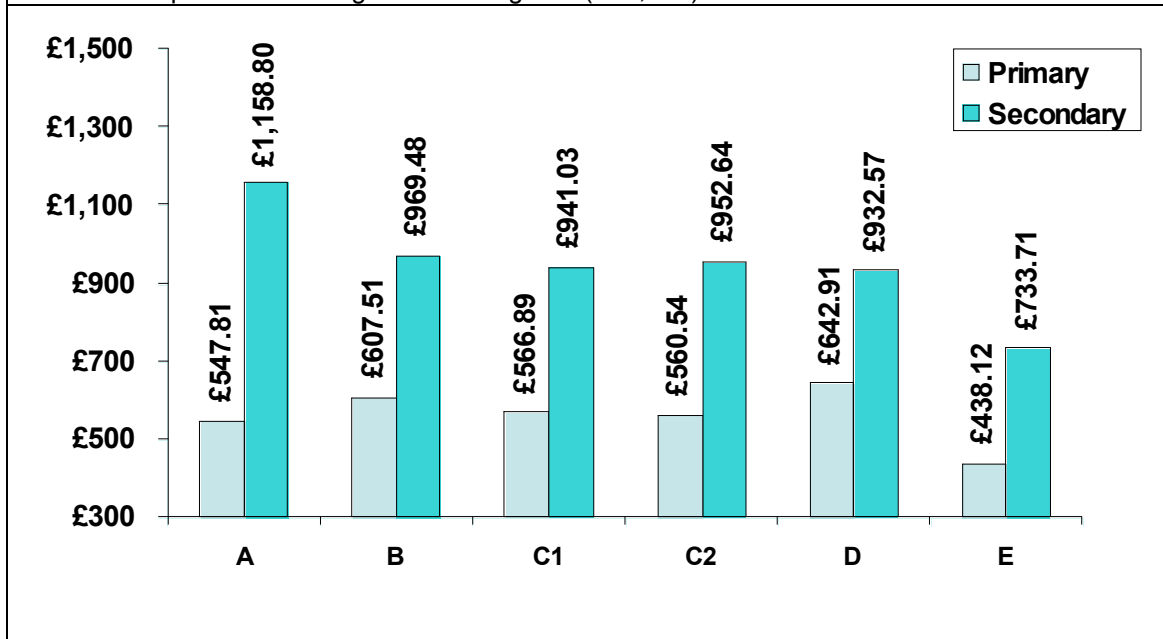
Table 14.1 : Total average spending by household income
Base = All Respondents giving household income (1,311)

	Primary £	Secondary £
>10k (n=215)	499.18	940.40
£10-14,999 (n=167)	567.48	948.86
£15-24,999 (n=289)	564.46	900.74
£25-34,999 (n=282)	564.84	937.98
£35-49,999 (n=209)	596.93	1013.67
£50,000+ (n=149)	587.23	1046.87

Social grade

There is more of a relationship between annual spending and social grade in relation to items for secondary school pupils than for primary school pupils, as the chart below shows.

Figure 14.1 : Average overall spending by social grade
Base: All respondents stating their social grade (n=1,456)



Free school meals

Total costs were then examined by eligibility for free school meals. We first looked at total annual costs *including* money spent on school meals.

Table 14.3: Total annual spending by qualification for free school meals (including spending on school meals)

	Total average expenditure £
Qualify - Primary (n=140)	£457.76
Not qualify - Primary (n=663)	£584.18
Qualify - Secondary (n=66)	£750.68
Not qualify - Secondary (n=593)	£969.24

Parents/carers of both primary and secondary schoolchildren who did not qualify for free school meals spent more than those who did qualify for free school meals.

However we then looked at total annual spending excluding spending on school meals:

Table 14.4: Total annual spending by qualification for free school meals (excluding spending on school meals for total annual spending figures)

	Total average expenditure
Qualify - primary (n=140)	£284.29
Not qualify - primary (n=663)	£287.04
Qualify - secondary (n=66)	£578.82
Not qualify - secondary (n=593)	£586.32

Once spending on school meals was excluded, spending on items for school was only marginally higher for families who did not qualify than those who did.

Parents/carers of primary schoolchildren who qualified for free school meals spent on average only £2.75 less in 2003 than those from families who did not qualify, while parents/carers of secondary schoolchildren who qualified spent £7.50 less (on average) than those who did not.

Total costs overview

Looking at the total average costs examined in this chapter, it is evident that the costs involved with sending a child to state school are considerable. The average amount spent on costs associated with schooling by a parent/carer of a primary school child was £563.15 with the cost rising to £948.11 for secondary school equivalents.

Factors such as income, social grade and eligibility for free school meals influence how much is spent on average. However it must be said that the differences in amounts spent - for example between the different household income brackets - are not huge. But the differences in the ability to pay between the different income brackets will be considerable and this is an important factor to bear in mind.

15 Conclusions

Total annual costs

The total annual average cost associated with sending children to state schools was £736.22. This amount varied in terms of the type of school attended. For primary pupils the average annual total was £563.15, compared to £948.11 for secondary pupils.

School meals

The largest area of cost was meals during the school day – including school dinners, packed lunches and meals bought off-site. The average cost per child of meals (based on all parents/carers) was £1.66 per day. The annual average spent on school meals by all parents/carers was £316.20.

Uniform

According to the survey of parents, the average amount spent on school uniform in 2003 was £157.50 per child. This figure is based on all parents/carers whose child required school uniform. The amount spent on uniform varied according to gender and type of school. For male primary school pupils the average spent was £132.02 compared to £138.28 for female pupils. For male secondary school pupils the average spent was £191.32 compared to £175.33 for female pupils.

The costs of each item of uniform given by schools were consistently lower than those given by parents/carers.

PE kit

According to the survey of parents/carers, the average amount spent per child on PE kit in 2003 was £78.47. This figure is based on all parents/carers whose child needed a PE kit. The amount spent on PE kit varied according to gender and type of school. For male primary school pupils the average spent was £52.53 compared to £44.78 for female pupils. For male secondary school pupils the average spent was £127.12 compared to £92.39 for female pupils.

Again costs given by schools were consistently lower for each item than those given by parents/carers.

School clothing combined

Looking at the cost of school clothing (uniform and PE kit) as a whole, the average cost to parents/carers (based on those whose child needed school uniform or PE kit) was £224.69 per child¹. Again the total costs varied according to gender and type of school. For male primary school pupils the average spent was £171.48 compared to £172.19 for female pupils. For male secondary school pupils the average spent was £312.85 compared to £261.08 for female pupils.

School trips

The costs to parents of a school trip in 2003 varied in terms of type of trip (whether residential or day) and in terms of the type of school. For parents of primary schoolchildren, the average cost of a day trip was £8.32 and for a residential trip £119.60. For parents of secondary schoolchildren, the average cost per child of a day trip was £19.38 and a residential trip was £186.72.

Class Materials

Parents/carers were asked whether they had to contribute to class materials for their child for six different lessons (music, cookery, IT, art, design and technology and sewing). Overall three in five parents/carers (61 per cent) were asked to contribute to class materials on behalf of their child. There was a clear difference between primary and secondary schools with this. Less than half (47 per cent) of parents/carers of primary schoolchildren had to contribute to class materials compared to 79 per cent of parents/carers of secondary school pupils. Respondents were then asked about the costs of class materials per child for the six subject areas. Music lessons had the highest associated average costs per child (£70.49). Cookery materials (£39.34) and IT materials (£20.25) were next followed by materials for Art (£14.32), Design and Technology (£13.19) and Sewing (£12.54).

The average amount spent on text books by parents was £17.10 per child per year.

The average amount spent per child on swimming lessons by parents/carers was £55.66 per year.

¹ This cost is based on parents/carers whose child required any form of school clothing – either uniform or PE kit or both. The overall average amount spent on school clothing is not simply calculated by adding together the average cost of school uniform and PE kit as some parents/carers may need to buy items of uniform but no PE kit or vice versa.

School Fund

Over a third (34 per cent) of parents were asked to contribute to the school fund. The average amount contributed over the year was £25.32. Thirty-eight per cent of the schools surveyed said they asked parents for a contribution to the school fund. The average amount asked from parents by schools was higher at £37.02 (however there was a low number of schools answering this question).

School photographs

The average cost paid for school photographs by parents in 2003 was £15.71 per child.

The average cost of charity events

The median cost paid by parents for a typical charity event was £1. The average amount was higher at £3.22.

The cost of other school activities

The average annual parental contribution was £11.81 per child for activities such as school raffles, parties, jumble sales etc. The median amount was lower at £6.

The cost of travel

Over one in five parents/carers (21 per cent) said their child used public transport or taxis to and from school. Of these parents/carers, 64 per cent said they paid the costs themselves. The average cost per child of travel to school paid by parents whose children used public transport or taxis was £7.29 a week.

Differences between schools' and parents'/carers' estimates of cost

The estimated prices for items of expense given by schools were generally lower than those calculated by parents/carers. This apparent underestimation of costs by the schools involved in the survey included uniform items, PE items, school trips and other expenses. This suggests a difference exists between costs expected by the schools and the actual costs met by parents. However the relatively low number of schools who responded to the survey should be borne in mind as this makes the schools data less robust.

Attitudes towards the cost of schooling

Twenty-nine per cent of parents/carers said they were very happy with the costs of schooling. Sixty-one per cent described themselves as quite happy. Nine per cent of parents/carers were not happy (including one per cent who said they were not at all happy).

Happiness with the costs of schooling was clearly related to the ability to pay. Those in the higher household income brackets were more likely to be quite or very happy with the costs compared to those with a lower annual household income.

Ease of meeting costs

Overall 18 per cent of respondents said they found it very easy to meet the costs associated with sending their child to state school. Over half (53 per cent) said they found it quite easy. In contrast 22 per cent said they found it quite difficult and five per cent said they found it very difficult to meet the costs expected of them. There were clear differences between household income brackets. Unsurprisingly respondents with a higher annual household income were more likely to say they found it easy to meet the costs. In contrast those on lower household incomes were more likely to say meeting the costs was difficult. Looking at the bottom two income brackets combined, over half (55 per cent) of those with a household income of under £15,000 felt it was quite difficult or very difficult to meet the costs discussed. Of the lowest household income bracket (less than £10,000pa), the proportion who found meeting the costs difficult was 62 per cent, including 14 per cent who said they found it very difficult.

Key influencing factors

Statistical analysis was used to establish the most important factors influencing overall happiness with the costs of schooling. The most influential factor was how easy parents/carers found it to meet the costs. Happiness with the costs of school trips was the second most influential factor, followed by happiness with the costs of school uniform.

The role of children as mediators

Nearly two thirds (64 per cent) of the young people interviewed said they *always* passed on letters from their school requesting financial contributions and a further 26 per cent said they did so *most of the time*. However eight per cent said they passed on letters such as these *not very often* or *never*. In terms of the reasons why letters are not always passed on, simply forgetting was by far the most common reason (68 per cent of those who did not always pass letters on), followed by the respondent not wanting to take part in the activity or go on the trip in question (29 per cent). However four per cent of children who did not always pass letters on said that one of the reasons for them not always doing so was thinking that their parents/carers could not afford to pay. This was clearly influenced by household income - eight per cent of children from families with an income less than £15,000 per year said that thinking their parents/carers could not afford to pay was a reason they did not always pass requests for parental contributions on, compared to only one per cent of children from families with an income of over £15,000.

The results from the parents and schools surveys have shown there is a considerable cost involved in sending children to state school. According to the research parents/carers spent on average £736.22 per child per year on costs associated with schooling.

The costs involved with schooling varied considerably between primary and secondary schools and (to some extent) between boys and girls.

The costs associated with items of uniform, PE kit and class materials drawn from the survey of schools were generally lower than those given by parents/carers in their survey. It might be expected that costs given by parents/carers would be more accurate than those given by schools but the consistent difference is an interesting finding perhaps worthy of further investigation.

The costs calculated are higher than those from some previous studies. This may be because this survey attempted to include all additional costs - not just the more obvious expenses of uniform, PE kit and school trips but also less conspicuous costs such as class materials, school fund contributions, school events, photographs, meals and travel. It may also be partly due to increases over time in the costs of those items.

The survey of parents/carers has also shown that ability to meet these costs and happiness with the different areas of expense vary with socio-economic factors such as household income and social grade, as well as other factors related to relative deprivation such as eligibility for free school meals.

The survey of children revealed that a small minority (particularly from low income families) did not pass on all requests for financial contributions from the school to their parents because of a concern that their parents could not afford them.

Appendices

A: Cost Calculations

Parents/Carers

This section outlines in more detail the methodology used for calculating costs for the different areas of expense using the data from the parent/carers survey. The questionnaire used in the survey can be found in Appendix E.

School Uniform and PE kit

Parents/carers were first asked whether a particular item of uniform or PE kit was required. Then, for a maximum of four items (i.e. four items for school uniform and four for PE kit) they were asked what the cost per item was and how many they had bought in 2003. The average overall cost for each item was then calculated by multiplying the average number bought by the average price in each case.

Clearly there are some limitations with this approach as it relies heavily on respondent recall of purchases over the previous 12 months. In this respect a diary approach might have achieved more accurate results, although this needs to be qualified by the length of time required to carry out this approach – essentially a full year would have been needed given the effect of the school year cycle on such expenditure – and the potential difficulty and costs involved in achieving high response rates. Time constraints on the project effectively dictated a telephone approach which, despite the reliance on ability to recall, is an efficient and effective way of collecting the data.

The fact that the interview length meant that each respondent was only asked for a maximum of four randomly chosen items also meant it was not possible to compile a complete picture of the expenditure of each parent/carers. To counter this, when the total annual spending on both uniform and PE kit was calculated, in cases where an item of uniform or PE kit was needed but no cost given (each respondent was asked the costs for a maximum of four items only) then an imputed cost was used - the mean cost for that item (based on all those who did answer the question). Whilst this approach is by no means flawless it did mean the most accurate data possible was obtained within the time and methodological constraints the survey had.

School Trips

Parents/carers were asked the price of the most recent school trip and the number of trips they were asked to go on. For the total annual spending chapter, annual costs for school trips were calculated by taking the average price and multiplying by the number of trips offered. The number of trips was actually a scaled question – 1,2,3, 4 or more. In order for the calculation to be made, a

value was applied for each category (1 =1, 2 = 2, 3 = 3, 4 = more than 3). There may have been a few cases where children went on more than four trips but in these cases the value given would have been four meaning this information could not be captured. This process was applied for both residential and day trips.

Class materials, swimming lessons, travel, meals

Throughout the parents/carers questionnaire, respondents were asked to give a cost of an item or contribution and then asked how often they paid that figure. This type of questioning was used to cover:

- Travel costs
- School fund
- School meals
- Class materials
- Swimming lessons

The questionnaire was structured to allow respondents to recall costs for different time periods. For example, for the costs of travel a parent may pay monthly, weekly, daily or per trip. In order to save time during the interview and to allow the most accurate information to be captured, respondents were given the option of giving answers in a way that fitted their recall – so if they paid for an item on a weekly basis, this was recorded and different payment intervals were resolved in the data processing stage. Each figure was then calculated back to the most appropriate time period for the specific area of cost comparison. Costs of class materials, swimming lessons and school fund were calculated to annual costs. Travel costs were calculated to weekly costs and school meals were calculated back to daily costs.

The exact formulae used to calculate these costs are outlined overleaf¹ (based on a school year of 195 days, 39 weeks, 11 months, six half-terms, or three terms).

¹ In the case of school fund, some respondents said the cost was a one off for whole of time spent at school. These costs were divided by five (five years at school). In the case of costs of school travel some costs were given for one trip. These costs were then multiplied by ten to obtain the corresponding weekly cost.

Annual costs calculation

Weekly	Multiply x 39
Monthly	Multiply x 11
Per half term	Multiply x 6
Per Term	Multiply x 3
6 monthly	Multiply x 2

Weekly calculation

Daily	Multiply x 5
Monthly	Divide x 20
Term	Divide x 12
Annual	Divide x 39

Daily calculation

Weekly	Divide x 5
Monthly	Divide x 20
Term	Divide x 60
Half term	Divide x 30

Capping of costs

Costs for class materials and swimming lessons were calculated to an annual total. This meant the cost assumptions made were based on money for class materials and swimming lessons being needed throughout the school year. Unfortunately time constraints with the questionnaire meant the exact period during which the lesson was taken by pupils could not be asked. There was the danger of costs being artificially inflated using this process as, for example, lessons may not take place every week for a complete year. Therefore, in order to minimise the chances of this, the recalculated costs paid for class materials were capped at £200 per annum for every subject apart from Music, which was capped at £300. This reduced the chance of random outliers disproportionately skewing the mean value.

Travel and meal costs were also capped to reduce the chance of random outliers affecting the average score. Weekly travel costs were capped at £36; daily school meal costs were capped at £7.

All other costs for the remaining areas were not capped.

Total annual costs calculation

Total annual costs were calculated for each respondent by adding together the costs for every area of expense asked about in the survey. If nothing was paid for an area of cost (e.g. no school uniform needed or no school photos paid for) then a value of 0 was used.

Because of time limitations with the questionnaire, not every cost was asked of each parent/carer. In cases where an item of uniform or PE kit was needed but no cost given (each respondent was asked the costs for a maximum of four items only) then the mean cost for that item (based on all those who did answer the question) was imputed.

In cases where an item or area of cost was needed but respondents did not know the exact price, the mean cost was imputed (again, based on all those who did answer the question). For example, if a parent/carer said they contributed to charity but could not remember the cost, the mean cost was used.

Three areas of cost were asked of a split sample due to time constraints - costs for school photographs, costs of charity contributions and costs of 'other' contributions (such as raffles and school parties). To calculate the total annual costs of these areas for each respondent, an average cost was applied for those parents not asked the questions. The average cost used in this instance was based on all those answering the question and included those people saying they spent nothing. The average amount used for the calculation of the total annual cost therefore differed in this respect to the average costs used in the other sections of the report, as the costs used in those sections of the report were based only on those who had actually needed to pay something.

B: Response Rates

Parents/carers survey

We achieved 1,496 interviews for the parents/carers survey - giving a crude response rate of 50 per cent based on all sample with a final outcome.

However, many of those who could not be contacted or who declined to take part before establishing eligibility (i.e. they were a parent or carer for at least one child aged five to 16 who was in state education) would have been ineligible to take part, so the “raw” 51 per cent response rate significantly under-estimates the “true” response rate. Based on previous research carried out for the Department for Education and Skills (on parental involvement in education), we know that the penetration (the proportion of households eligible) would be about 18 per cent. If we apply an 18 per cent penetration assumption (i.e. we assume that 18 per cent of households would be eligible), the “true” response rate is 81 per cent.

Table A1 shows the telephone survey fieldwork outcomes and the response rate.

Table A1: Survey fieldwork report and response rates

Sample outcome	Main survey	Refusal survey – 1,391 soft refusals transferred from main survey	Net total	
Total sample in survey	27536	1391	27536	
Out of scope - deadwood				
Computer/fax number	804	5	809	
Number unobtainable	25	2	27	
Duplicate number	12	0	12	
10+ calls with no contact	2094	0	2094	
Business number	1459	21	1480	
Dialler modem tone	114	0	114	
Dialler bad number syntax	5338	10	5348	
Dialler incomplete	151	0	151	
Dialler site out of service	1992	9	2001	
Dialler nuisance hangup	1	0	1	
Dialler - other error	677	3	680	
Out of scope – known to be ineligible				
No children in state school	3029	166	3195	
No children not in reception class/6th form	38	1	39	
Ineligible - no children	5604	356	5960	
Ineligible - children go to private school	152	12	164	
Ineligible - children outside of age range	2354	138	2492	
Ineligible - children in 6th form only	15	1	16	
TOTAL KNOWN TO BE OUT OF SCOPE: deadwood + ineligible			24583	
TOTAL POTENTIALLY IN SCOPE: total sample less out of scope			2953	
				*Net total after adjustment for penetration
In scope/Potentially in scope				
Respondent unavailable during fieldwork	38	21	59	*11
Respondent not able to do interview (language or communication difficulty)	120	2	122	*22
Unwilling to take part in screener interview	62	1	63	*11
Dialler no answer	1	0	1	*0
No age identifier	1	0	1	*0
Hard refusal	576	212	788	*142
Soft refusal	9	293	302	*54
Soft refusal transferred to refusal survey	1391	na	0	0
Refused to say how many children in state education	2	0	2	2
Refused to say which child had most recent birthday	4	0	4	4
Unwilling to take part after receiving letter	5	0	5	5
Abandoned interview	101	9	110	110
Completed interview	1367	129	1496	1496
TOTAL CALCULATED IN SCOPE			1857	
FINAL RESPONSE RATE			81%	

* Penetration applied: 18 per cent

Schools response rate

For the schools survey, we received 280 completed questionnaires (256 postal, 24 online) from a total issued sample of 700. Table A2 gives a breakdown and response rates.

Table A2 : Schools survey response rate

	Total sample	Completed response	Response rate (%)
Overall	700	280	40
Primary schools	385	196	51
Secondary schools	315	84	27

C: Weighting

Weighting was applied to both the Schools and Access to Youth data. The parents/carers data from the telephone survey were not weighted because there is no available profile of parents with children aged five to 16 in state schools against which to weight.

Schools data

Weighting was applied to the data for the Schools survey to compensate for differential non-response to the survey.

The profile of schools responding to the survey was compared to that in the sample population provided by the DfES. Primary and secondary schools were weighted separately. Results were weighted by urban / local authority and by category of school funding / organisation to the target proportions taken from the overall population of schools. This corrected for non-response patterns in the schools survey.

Table C1: Weighting – Primary schools

	Unweighted proportion %	Weighted proportion %
Type of LEA		
Urban LEA	40	63
Rural LEA	60	37
Organisation		
Community	55	62
Foundation	3	2
Voluntary aided	23	21
Voluntary controlled	20	15

Table C2: Weighting – Secondary schools

	Unweighted proportion %	Weighted proportion %
Type of LEA		
Urban LEA	55	70
Rural LEA	45	30
Organisation		
Community	73	65
Foundation	14	15
Voluntary aided	7	16
Voluntary controlled	6	4

Access To Youth data

The data were weighted to ensure that demographic profiles match those of all young people in Great Britain aged 10-16. A raking weighting technique was used in which target profiles were set for a series of separate demographic variables. The computer system then allocated a weight to each individual such that the overall composition of the sample was balanced in terms of the targets set. Five separate variables were controlled in this way, and the target profiles used are shown in Table C3.

Table C3: Weighting Targets – Access to Youth

	Target Weights Applied (%)
Sex	
Males	51.26
Females	48.74
Age	
10	14.63
11	14.43
12	14.25
13	14.43
14	14.14
15	14.10
16	14.02
Social Grade	
AB	25.09
C1	26.53
C2	20.49
D	18.70
E	9.19

D: Key driver analysis

We carried out a programme of multivariate analysis, as part of the analysis process, to identify the factors that had most impact on parents/carers happiness with the overall costs of schooling. These were carried out by BMRB's Statistics and Methods Centre, working with the research team. The main technique used was multiple regression (also known as key driver analysis, or MLR).

Multiple regression analysis is a statistical technique regularly used by BMRB in public attitude research. It seeks to identify the influences which make an important contribution to, for example, overall happiness with a service, by showing to what extent views about the service overall can be predicted from views about particular aspects of the service.

The technique

The technique requires:

- A **dependent variable** which is to be explained, for example overall happiness with the cost of schooling.
- A number of **independent variables** (e.g. happiness with individual costs of schooling such as school trips or uniform, or ability to meet costs involved with schooling, which are potentially able to explain variation in the dependent variable).

The procedure looks at the patterns of answers for the dependent versus the independent variables. The closer the pattern of answers, the more likely an independent variable is to be a key driver.

The dependent factor examined was the four-point scaled question about how happy parents / carers were about the costs associated with their children's schooling:

Q71 Taking everything we have talked about into account, how happy are you with the costs associated with sending your child to State school?

Very happy	1
Quite happy	2
Not very happy	3
Not at all happy	4

Obvious independent ('cause') variables were the scaled questions concerning happiness with each of the subsidiary costs (uniforms, school trips, PE, materials). Another factor likely to influence was a scaled question about how easily the household could afford school costs.

Because other contributory areas could easily be unique items – like buying a new pair of football boots every year - we looked (via correlation coefficients) at the relationship between the dependent factor (Q71) and all other items in the questionnaire.

When it comes to measuring **relative** effects, we have to consider two things:

- the strength of relationship (and here scales are more sensitive than yes-no answers)
- the number of people affected (things affecting everyone have the best chance of being influential).

Multiple regression takes these both into consideration. Beta scores (standardised regression coefficients) are produced by the analysis for each of the independent variables to show the influence each one has in explaining the dependent variable. The Betas show how influential a predictor each one is relative to each other (this is sometimes called derived importance). The relatively small number of factors that emerge as the most effective predictors of the dependent are called key drivers.

The results

Not surprisingly the largest correlations with the dependent were in fact the four subsidiary happiness questions and the ease of bearing the costs.

	Corr	Base
• Happiness with uniform costs	0.47	1404
• Happiness with PE costs	0.45	1310
• Happiness with school trips costs	0.50	1432
• Happiness with materials costs	0.47	976
• Ease of family meeting costs	0.50	1472

All the correlations were fairly similar, but happiness with class materials costs had a lower base and therefore would clearly not be as important a key driver. Ease of paying the costs and happiness with the costs of school trips cost were expected to have the highest “Betas”.

We looked through the rest of the questionnaire and although there were one or two areas where the correlations with the dependent reached above 0.30, the bases involved were generally so low that these had only miniscule effects and were therefore discounted from further analysis.

Table D1 shows the relationship between the variables and happiness with overall costs. The scores are shown as beta correlation coefficients - the higher the value, the stronger the relationship.

Table D1 : Key Driver Analysis – Happiness with overall costs

Base = All Parents / carers (1496)

	Happiness with overall costs involved with schooling (Beta correlation coefficient)
Ease of meeting costs	0.25
Happiness with School Trips costs	0.22
Happiness with uniform costs	0.18
Happiness with Class Materials costs	0.16
Happiness with PE kit costs	0.12

As we suspected from the correlations, the ease (or otherwise) with which parents/carers were able to meet the costs involved emerged as the biggest driver in terms of overall happiness with the costs of schooling. Happiness with the costs of school trips was the next most important factor followed by happiness with uniform costs and happiness with the costs of class materials. Happiness with PE costs appeared to have the least effect on overall happiness with the costs of schooling.

So we have something in our model now that relates to family hardship rather than just particular items of expenditure.

We also looked more closely at what factors influenced the ease of being able to meet all the costs (see Table D2).

Table D2 : Key Driver Analysis – Ease of meeting costs

Base = All Parents / carers (1496)

	Ease of meeting costs (Beta correlation coefficient)
Income	0.31
Happiness with School Trips costs	0.22
Happiness with uniform costs	0.14
Happiness with Class Materials costs	0.08
Happiness with PE kit costs	0.13

Predictably household income was the largest driver, followed by the four specific costs (especially that for school trips).

Other factors such as household tenure, whether or not the school pays in cases of difficulty, whether or not child did not go on last trip because couldn't afford it and whether parents/carers had to buy multiple rugby and football boots in a year all played some part. However the Beta scores for these factors were 0.08 or lower and once scores reach this level confidence in predicting relationships is reduced significantly.

E: Survey documents

Appendix E(1)

Development stage topic guide – parents

Topic Guide

Aims:

- To explore the full range of items and activities that the parent/ carer has been asked to pay for by their children's school
- To uncover the cognitive process respondents go through when they recall how much they have spent on various items and activities. Which costs are easy to remember and which ones are hard?
- To find out what would happen or their perceptions of what might happen at their children's school if they were unable to meet any of the requirements set by the school.
- To explore the attitudes towards paying extra for their child's education? Does it put the family under financial strain? Do they have to give up other things in order to meet these costs? Are they willing to make sacrifices?

1. Introduction

- Introduce yourself and BMRB (independent research agency)
- About the project:
 - Study being carried out on behalf of the Department of Education and Skills.
 - Overall aim: to find out the extra costs involved when you send your child to a state school.
 - We will soon carry out a telephone survey of a representative sample of the population early next year. Before we start the survey, we're talking to a small number of people to inform ourselves in more detail about what sorts of things that parents are asked to pay for. How much they are asked to contribute towards their child's education and whether parents find these costs easy or difficult to meet.
- Interview length will be about one hour
- Explain confidentiality and anonymity: Nothing you say will be fed back, by name, to the government or anyone else.
- Explain tape recording and **gain consent**: purely for analytical purposes, e.g. 'tape record interviews to avoid me having to take frantic notes/allows me to listen more carefully'
- Nobody else, other than the research team, will see the transcripts or hear the tape

2 Familiarisation

- First name, occupation?
- Explore their household circumstances
 - Who do they live with – how many children have they got?
 - Who is mainly responsible for the child's schooling?

- What school do they go to? Primary/Secondary?
- Are they generally happy with the school/schools
- How long have they lived in the area
- What do they do? Partner's occupation? (if applicable)

- Whether they have taken part in a survey like this before
- How did they find that experience

3 Items and Activities

Uniform –

NB: Ensure price per item captured. Probe for any seasonal variation in Uniform

- Does the school require pupils to wear a uniform?
- What does the uniform consist of?
- How much have they paid for the uniform?
- How easy/difficult is this to remember?
- How often do you buy a uniform?
- Are there any items the school says you must buy from a particular shop, supplier or from the school itself?
- Availability of second hand uniforms
- Are you aware of any help that is available with the cost of your child's school uniform either from
 - a) the Local Education Authority
 - b) the school

- Have you ever kept your child away from school because they did not have the required uniform?
- Have you ever decided not to send your child to a particular school because the uniform was too expensive?

Sports equipment

NB: Ensure price per item captured. Probe for any seasonal variation in Uniform

- Does the school require that the pupils have a special PE uniform?
- Sports kit?
- Special kits for sports? Special kits for teams?
- Travel to games if child is in team/playing fee
- What else have you been asked to pay for?
- Does the school have spare sports kit / equipment that pupils can use if they cannot provide their own?

Swimming Lessons

- Are you asked to pay towards the cost of school swimming lessons? If yes how much?
- Is this a charge for transport to the swimming pool for the lessons themselves or both?

School lunches (meals)

- Does your child(ren) eat school meals, packed lunch or eat lunch at home?
- Is your child entitled to free school meals? Does your child take up that entitlement?
- How much do you pay for school meals? Do you tend to think of this as a weekly or monthly or daily cost?

Do you give extra money for snacks or milk in addition?

Transport

How far do you live from your child's school?

How does your child(ren) get to school?

If public transport – how much do they pay for this?

If the school or LEA arranges the transport – how much do they pay for this?

How do they normally pay for this? Monthly travel card, single fare etc.

School trips – day trips during term time/ school hours

Have you been asked to pay for any school trips?

How many/how often?

How much did you have to pay?

Were they voluntary contributions?

Do you know what would happen if you or another parent could not afford to pay?

School trips – residential trips

Has your son/daughter been on invited to take part in any school trips that involved overnight stays?

How many?

What was the purpose of the trip?

Did the trip take place during school holidays?

Do you know how places on the trip were allocated?

Did your child go on the trip?

If not why not?

What were you asked to pay for?

How much did you actually pay?

Was there an opportunity to pay in instalments?

Were you invited to discuss any difficulties with paying for the trip with the teacher(s) involved?

Timings – when are these trips announced?

Would they like to send their child?

After school clubs/ activities

Does your child take part in any after school clubs?

What sort of activities do they involve?

Do you have to pay?

Would your child be able to attend if you were unable to pay?

Has your child ever attended a school organised evening trip (theatre visit, bowling alley etc)?

If so, was it a 'fun' activity or linked to lessons?

Were you charged for the trip and if so how much?

RECAP Question – We have just talked about uniform, school meals, transport, trips and afterschool clubs/ activities;

Have you ever been unable to afford to pay for any of the things that the school asked you to pay for?

What did you do/ What happened?

Material for classes

Have you been asked to contribute money towards material for classes?

What sorts of material was that?

Books

Revision books

Material for sewing

Woodwork/Metalwork

Cookery

Art Lessons

IT Lessons

Any other material for classes

Does the school have these items available for those pupils to use who cannot provide their own?

Without the school asking, have you ever chosen to provide any of these items for your child, rather than use those provided by the school?

Are you asked to pay any examination fees – if so for which lessons?

Music Lessons

Does your child participate in extra curricular music lessons?

Are you asked to pay towards the cost of these lessons, if so how much?

When do these lessons take place, lunchtime; evenings; during the school day?

How many pupils are taught in the group?

Stationery

How much do you spend on stationery? Difficult to remember? What does the school require you provide?

Pencils,

Note books

Calculator

School bag

Special bags for classes like PE, Arts etc.

What sort of personal equipment do you choose to provide for your child?

Does the school provide this sort of equipment for loan to those pupils who do not provide their own?

Contributions to the school fund

Have you ever been asked to contribute to the school fund?

Was the request made for a specific purpose – library books; refurbishment; lesson equipment?

How often is that?

How much money were you asked to contribute?

Have you been asked to contribute something else to the school fund such as ingredients for a cake, raffle, jumble sale etc.

Contributions to charity

Have you been asked by the school to contribute to charity?
Probe: such as support a third world child? Comic Relief? Non-uniform days?

How much?
How often?

Other activities or items

Have you been asked to contribute to any other activities or items by the school.
For example school photos.

Finding a school place – admission

Were there any costs involved when you applied for a place for your child/children at the school?

If so, what for and how much?

4 Not meeting the costs

RECAP question - We have just talked about sports equipment, materials for classes, contributions to charity and school funds and arranging a school place for your child.

Have you ever been unable to afford to pay for any of the things that the school asked you to pay for?

What did you do/ What happened?

Implications

Do you know what would happen at your child's school when parents are unable to afford to pay for anything?

What do you think might happen?

Do you know if there is any help with any of the costs discussed available – if so, where does the help come from, LEA, school etc.

How easy would you say it is for your family to meet all the costs discussed?

Have you ever had to sacrifice other things in order to pay for your child's schooling?
What was that?

5 Attitudes

What do you think about your child's school? Generally happy or unhappy?

How do you feel/think paying these costs? Fair/Unfair

Are there any particular costs that you think the school should not ask parents to pay for?

RECALL PROBES

- How did you remember that?
- What kind of things are you thinking of to help you remember...?
- Did you have a particular time period in mind?
- How well do you remember that/why?

JUDGEMENT AND RESPONSE

How did you count/estimate/come to that answer?

Thank and Close

*Record Observations

Appendix E(2)

Development stage topic guide - schools

Topic Guide

Aims:

- To explore the full range of items and activities that schools require from parents, including expenses school-wide, department-wide and for extra curricular activities
- To find out the level of ease in headteachers/teachers finding out the costs of the various ranges of items and activities
- To find out what action would be taken if parents of pupils were unable to meet any of the requirements set by the school, i.e. to find out about their policies on non-payment and whether there is help available for parents
- To explore the differences between primary and secondary schools in terms of costs required of parents (and potentially middle and special schools)

2. Introduction

- Introduce yourself and BMRB (independent research agency)
- About the project:
 - Study being carried out on behalf of the Department of Education and Skills.
 - Overall aim: to find out the extra costs imposed on parents by sending their children to state schools.
 - We will soon carry out a postal/web survey of schools, alongside a telephone survey of parents. Before we start the survey, we're talking to a small number of people to inform ourselves in more detail about what sorts of things that parents are asked to pay for, and the level of these costs.
 - For the postal survey of schools, we need to make sure that the questions we are going to ask are clear and easy to answer, how easy it is for schools to collect/obtain the required information and that as many of the possible items of expenditure are included on the questionnaire.
- Interview length will be about one hour
- Explain confidentiality and anonymity: Nothing you say will be fed back, by name, to the government or anyone else.
- Explain tape recording and **gain consent**: purely for analytical purposes, e.g. 'tape record interviews to avoid me having to take frantic notes/allows me to listen more carefully'
- Nobody else, other than the research team, will see the transcripts or hear the tape

2 Familiarisation

- First name, role within the school
- Length of service at current school
- Brief overview of previous teaching experience - responsibilities e.g. head of subject, pastoral responsibilities

3 Items and Activities

Uniform

Are pupils required to wear a uniform?

What does the uniform consist of?

How much does this uniform cost on average? Is this cost roughly the same for boys and girls?

Does the uniform change at different stages of the school?

What if they can't afford uniforms?

Does the school encourage 2nd hand uniforms?

Is there any help available for parents who are unable to afford school uniform from either

- a) Your school
- b) The Local Education Authority

Where help is available does the school make parents aware of this.

School trips – day trips during school hours/termtime

Are pupils required to pay for day trips that take place in school time?

Are pupils required to pay for day trips that take place outside of school time?

Are trips outside of school time that are a necessary part of the national curriculum or are part of the syllabus for examinations charged for?

How many on average are there per year?

How much on average would a school day trip cost?

Are the payments for school trips voluntary or compulsory?

What was the cost.

What were the trips for?

What if they can't pay?

Do you invite parents who may have difficulty making contributions for trips or making payments for trips to approach the school, in confidence, to discuss any payment problems?

How do you allocate places for trips?

School trips – residential trips

Does the school organise any school trips that involved overnight stays?

How many?

What was the purpose of the trip?

Did the trip take place during school holidays?

How are places on the trip allocated?

What do you charge for on these trips?

Was there an opportunity to pay in instalments?

Do you invite parents to discuss any difficulties with paying for the trip with the teacher(s) involved?

Timings – when are these announced?

Do you inform eligible parents of their child's right to free board and lodging?

School lunches

How much does a school lunch cost?

Do pupils have the option of bringing a packed lunch?

How much is allowed for a free school meal?

Sports equipment

Are pupils at your school expected to purchase any sports equipment?

What sports are these for?

Do you have spare equipment for those who cannot afford this.

Material for classes

Are there any materials needed for classes which are not provided by the school?

What type of materials are these?

If pupils lose books what are the consequence – e.g. are they asked to pay for replacement?

Course work

Is coursework prepared on a computer system likely to receive higher markings for presentation than a handwritten document?

Stationery

How much stationary are pupils at your school expected to purchase?

What sort of items does this include?

Calculators?

Does the school have spare items for use by pupils?

Music Lessons

How many pupils at your school take lessons for a musical instrument outside of normal music classes ?

Do the lessons take place in small (four or less) or larger groups (more than four)?

As part of this tuition, do these children study for prescribed public examinations e.g. GCSE?

What types of instruments can they learn to play?

Is this voluntary or compulsory?

Does the school provide the instruments?

What are the cost to parents of these lessons?

Does this include instrument hire charges?

Art Lessons

Does your school have compulsory/voluntary art lessons?

Is this offered as a GCSE?

What materials are provided and are any extra materials required by the pupils?

Estimate of total cost of materials required by students

What happens if they can't buy the materials asked of them?

Sewing Lesson

Does your school offer sewing lessons/any other form of design/technology lessons/woodwork/metalwork/other craft lessons?
Is this offered as a GCSE?
Are students expected to supply any of their own materials/equipment e.g. do students with sewing machines at home have any advantage?

IT Lessons

What is the ratio of computers to pupil for IT lessons in your school?
Do pupils have homework for their IT lessons where they would be at an advantage if they had the use of a PC?

Other lessons/other expenses

Are there any other lessons where pupils may need to contribute equipment/materials – e.g. cookery lessons?
Are there any other miscellaneous items of expenditure – e.g. school photos?
Are any parents charged for their children's examination fees – if yes explain?

Contributions to the school fund

Are there any requirements for parents to contribute to a school fund?
Is this voluntary or compulsory?
What is this money spent on?
Are there many charitable funds at your school to which pupils and their parents are asked to contribute, e.g. non-uniform day etc.?

Parental complaints

Does your school ever receive complaints from parents about the expenditure on items such as those we have discussed?
If yes – how many on average?

Sum up

How much of an issue do you think expenditure on extra items/activities is to parents of children at your school?
How does the overall expenditure on items/activities at this school differ to other schools you may have taught at?

RECALL

- How did you remember that?
- What kind of things are you thinking of to help you remember...?
- Did you have a particular time period in mind?
- How well do you remember that/why?

JUDGEMENT AND RESPONSE

How did you count/estimate/come to that answer?

Appendix E(3)

Parents letter – Information letter sent to parents/carers on request

Dear XX,

You recently received a telephone call from one of our interviewers asking you to take part in a survey about the costs of sending children to state school. Thank you for your interest in this survey. This letter is intended to give you some more information about this project.

The Department for Education and Skills (DfES) has commissioned BMRB, an independent market research agency, to conduct a survey into the extra costs associated with sending children to school. We would like to talk to parents or guardians of children to establish what extra costs are involved in sending children to state schools and to measure attitudes towards the cost of schooling in Britain state school education. The survey should take on average 15-20 minutes.

Please note that any answers given will be treated in the strictest confidence. Only members of BMRB's research team will have access to responses and any data or reports passed on to the DfES will be anonymised. It will not be possible to identify any individual taking part from the answers they give. BMRB operates according to the Market Research Society code of conduct. If you want to check BMRB's credentials you can call the MRS Free-phone number 0500 396999. No one will try to sell you anything as a result of this interview.

I hope this letter answers any questions you have about this survey. If you have any further questions or would like to know more about this project please contact me by phone on 020 8433 XXX or by email to XX.

Thank you very much for your time.

Yours sincerely,

XXXX

Appendix E(4)

Parents/ carers Questionnaire

(Original question numbers used – some question numbers missing due to questions being dropped from final version)

SCREENER

S1 Good afternoon/evening. My name is Calling from the British Market Research Bureau, an independent market research company.

We are conducting a survey on behalf of the Department for Education and Skills into the extra costs involved in sending children to state schools.

IF NECESSARY

We would like to talk to parents or guardians of children to establish what costs are involved in sending children to state schools and to measure attitudes towards the cost of state schooling in Britain.

S2 First of all can I just check, are there any children aged between 5 and 16 who attend State school currently living in this household?

Yes	1	CONTINUE
No	2	THANK AND CLOSE
Refused	3	

S3 We would like to conduct the interview with the parent or guardian who is best equipped to talk about their child or children's education and the cost involved. Are you the parent or guardian best equipped to talk about these issues?

Yes	1	CONTINUE
No	2	ASK TO TRANSFER MAKE APPOINTMENT IF NECESSARY

Re introduce survey if necessary

IF NECESSARY MAKE APPOINTMENT. COLLECT NAME OF CORRECT RESPONDENT.

WE CAN ACCEPT REFERRALS TO OTHER HOUSEHOLDS IF PARENTS LIVE APART - COLLECT NEW TELEPHONE NUMBER AND NAME AND THEN CALL NEW NUMBER

WHEN SPEAKING TO CORRECT RESPONDENT, CONTINUE

IF CORECT RESPONDENT
S4 Would you be willing to take part in the survey?

Re introduce survey if necessary

REASSURANCES:

- The interview will take between 10 and 15 minutes
- All your answers will be treated with the strictest confidence under the rules of the Market Research Society Code of Conduct
- We will not try to sell you anything as a result of this interview
- If you want to check BMRB's credentials you can call the MRS Society Freephone number 0500 396999
- If you want to speak to someone at BMRB about the survey please contact Tim Brunwin, Gemma Deakin or Ed Mortimer at BMRB on 0208 5665000
- If you want to speak to someone at the Department for Education and Skills about the survey please contact Michele Weatherburn on 02079255953
- If you want more details on the survey BMRB will be happy to send a letter to you

IF RESPONDENT WANTS LETTER RECORD CONTACT DETAILS – OTHERWISE PROCEED TO S5
S4A Can I just take your address and we will send a letter out in the post to you.

SECTION 1 – CHILD DETAILS

WHEN SPEAKING TO MOST SUITABLE RESPONDENT

S5 Could I just record your name?

S7 How many children aged between 5 and 16 attending state school live in this household?

1	1	ASK S7A
2	2	ASK S7B
3	3	
4	4	
5	5	
6	6	
7	7	
8 or more	8	
Refused	X	CLOSE

IF ONLY ONE CHILD ATTENDING STATE SCHOOL(Q7=1)

S7A And can I just record his / her name?

IF MORE THAN ONE CHILD ATTENDING STATE SCHOOL.

S7B We need to randomly select one child for you to answer questions on. Can I ask the name of your child aged 5-16 attending state school whose birthday was most recent?

Yes - Write in NAME (.....)	1	GO TO S8
Next birthday is twins / triplets etc.	2	ASK S7B1
REFUSED	3	CLOSE

IF TWINS / TRIPLETS

S7B1 Which of your children's names comes first alphabetically.

ASK ALL

S8 Record child's sex (should be clear – ASK IF NECESSARY)

Male	1	
Female	2	

INTERVIEWER TEXT

Thank you. Please answer the next questions with (NAME) in mind.

SECTION 1 – BACKGROUND SCHOOLS INFO

Q1 What school year is (NAME) in?

Year 1	1	CONTINUE
Year 2	2	
Year 3	3	
Year 4	4	
Year 5	5	
Year 6	6	
Year 7	7	
Year 8	8	
Year 9	9	
Year 10	10	
Year 11	11	
Year 12 (6 th Form)	12	GO TO FILTER A
Reception Class	13	GO TO FILTER ABOVE Q2
DK	X	
REFUSED		

IF DK / REFUSED SCHOOL YEAR:

Q2 Is (NAME) at primary, middle or secondary school?

Primary	1	
Middle	2	
Secondary	3	
DK	X	TERMINATE

IF DK SCHOOL YEAR (S9=12)

Q2A Is (name) at (6th form college) or (Reception Class)

Yes	1	GO TO FILTER A
No	2	CONTINUE

FILTER A

IF SELECTED CHILD TURNS OUT TO BE AT 6TH FORM OR RECEPTION CLASS – AND RESPONDENT HAS MORE THAN ONE CHILD AT STATE SCHOOL - GO BACK TO S7B AND ASK FOR OTHER CHILD

IF SELECTED CHILD TURNS OUT TO BE AT 6TH FORM OR RECEPTION CLASS AND NO OTHER CHILDREN AT STATE SCHOOL – THANK AND CLOSE

INTERVIEWER TEXT

I'm now going to ask you to think about the types of things or activities that (NAME's) school may ask you to pay for or contribute to, for example school uniforms, lunches and trips.

SECTION 2 - UNIFORM

Q3 Starting with School uniform, does (name's) school require pupils to wear a school uniform?

Yes	1	GO TO Q3C
No	2	CONTINUE
DK	3	

ASK ALL WITH SCHOOL UNIFORM

Q5 Please tell me which of the following items of uniform you are required to buy for (name)...

ADD IF NECESSARY:

Please think only of normal school uniform – PE kit will be covered later

Response list filtered on sex of child. MULTICODE.

<u>Girls</u>	<u>Boys</u>
i. Blouse/shirt	i. Shirt
ii. Trousers	ii. Trousers
iii. Skirt/kilt	iii. Shorts
iv. Jumper / sweatshirt	iv. Jumper / sweatshirt
v. Blazer	v. Blazer
vi. Dress / Pinafore	vi. -
vii. Tie	vii. Tie
viii. Shoes	viii. Shoes
ix. School Bag	ix. School Bag
x. Hat	x. Hat

ASK Q6 FOR MAX 4

IF MORE THAN 4 ITEMS MENTIONED RANDOMLY SELECT

Q6 And thinking of (ITEM) how many of these did you buy as part of school uniform in 2003?

IF BOUGHT ITEM ASK Q6A

Q6A How much did they cost per item?

WRITE IN _____ -

MUST USE POUNDS AND PENCE & DECIMALS (00.00)

ASK ALL WITH UNIFORM

Q6B Has (name) ever been sent home from school because they did not have the right uniform?

Yes	1	
No	2	
DK	3	

ASK ALL WITH SCHOOL UNIFORM

Q6C How happy are you with the costs associated with buying school uniform for (name)?

Very happy	1	
Quite happy	2	
Not very happy	3	
Not at all happy	4	
DK / REFUSED	X	

ASK ALL

Q7 Does (name's) school require pupils to buy a PE or Games kit?

Yes	1	CONTINUE
No	2	GO TO Q9B
DK	3	

Q8 I am now going to ask about the kit. Which of the following items does (NAME)'s PE or Games kit consist of?

READ OUT

<u>Girls</u>	<u>Boys</u>
I. Shorts	I. Shorts
II. T-shirt (used all year round)	II. T-shirt (used all year round)
III. Summer PE shirt	III. Summer PE shirt
IV. Winter PE shirt	IV. Winter PE shirt
V. Skirt	V. Football/rugby shirt
VI. Full Tracksuit	VI. Full Tracksuit
VII. Plimsolls/trainers	VII. Plimsolls/trainers
VIII. Jumper/tracksuit top	VIII. Jumper/tracksuit top
IX. Hockey boots	IX. Football/rugby boots
X. Swimming costume	X. Swimming trunks

ASK FOR MAX 4

IF MORE THAN 4 ITEMS MENTIONED RANDOMLY SELECT

Q9 And thinking of (ITEM) how many of these have you bought in 2003?

WRITE IN _____

IF BOUGHT ITEM ASK Q6A

Q9A How much did they cost per item?

WRITE IN _____

ASK ALL WITH PE KIT

Q9B How happy are you with the costs associated with buying PE Kit for (name)?

Very happy	1	
Quite happy	2	
Not very happy	3	
Not at all happy	4	
DK / REFUSED	X	

ASK ALL WITH UNIFORM / PE KIT

Q10 Thinking about uniform as a whole, does either some or all of the uniform have to be bought from a designated shop or the school itself or can it be bought from any outlet?

PROBE AS APPROPRIATE
MC 3 and 4

All has to be bought from designated shop	1	CONTINUE
All has to be bought from school	2	
Some items have to be bought from designated shop, but other items can be bought from anywhere	3	
Some items have to be bought from the school itself , but other items can be bought from anywhere	4	
All items can be bought from anywhere	5	
DK	X	

Q11 Does the school provide the opportunity to buy or supply new or used school uniforms?

PROBE AS APPROPRIATE

Yes - New uniform only – School shop	1	CONTINUE
Yes - Second hand uniform only	2	
Yes - Both new and second hand uniform	3	
No - School provides no opportunity to buy uniform		
DK	X	

Q13 Do you receive any financial help or assistance with buying school uniform for (name)

IF YES : WHAT SORT

PROBE FULLY. MULTICODE IF NECESSARY.

No financial assistance	1	
Local Education Authority Grant	2	
Charities	3	
Friends / Family	4	
Funds from School	5	
OTHER (SPECIFY) _____	6	
DK	X	
Refused	Y	

SECTION 3 - MEALS

ASK ALL

Q14 Thinking now about meals during school hours, does (NAME) usually have ...
READ OUT

A Packed Lunch	1	
A School Dinner	2	
A meal at home	3	
A meal out	4	
(Do not read out) Other	5	
DK	X	GO TO Q19

Q15 Does (NAME) qualify for free school meals?

Yes	1	
No	2	
DK	3	
REFUSED	X	

IF PACKED LUNCH OR EAT AT HOME OR EAT OUT

Q18 Why does (name) take a (packed lunch / eat at home / eat out) rather than have a school meal?

MULTICODE

(He/she) prefers to take own food / eat at home / eat out	1	
School meals are too expensive	2	
School meals are not value for money	3	
School meals are not healthy	5	
School meals are not filling	6	
Prefers to eat with friends who have same lunch arrangement	7	
Other (specify)	8	

ASK ALL

Q19 How much do you typically spend on meals during school for (name) ?

WRITE IN AMOUNT IN POUNDS AND PENCE _____

Q19A And is that.....

READ OUT

Daily	1	CONTINUE
Weekly	2	
Monthly	3	
Half term	4	
By Term	5	
Yearly	6	
OTHER	7	
DK	X	
Refused	Y	

SECTION 4 - SCHOOL TRIPS

I would now like you to think about any school trips (name) might have been invited on in 2003

Thinking about both day trips and trips involving overnight stays...

Q20 How many day or residential trips for (NAME) were you asked to pay for in 2003?

One	1	
Two	2	
Three	3	
More than 3	4	
NULL	5	SKIP TO Q24
DK	X	
Refused	Y	

Q22 What was the most recent one that you were asked to pay for that (name) was invited to go on in 2003?

Day Trip		
Theatre	1	
Cinema	2	
Museum	3	
Gallery	4	
Historic Building	5	
Nature Walk	6	
Field Trip	7	
Residential Trip		
Residential trip: UK	8	
Residential trip: Abroad	9	
OTHER (Specify)	10	
DK	X	GO TO Q24

Q22A Did (name) go on the trip?

Yes	1	CONTINUE
No	2	CONTINUE

Q22B Were you asked to pay the whole cost for the trip?

Yes	1	
No	2	
Refused	3	

Q22C How much were you asked to Pay?

--

Q22D Was there an opportunity to pay in instalments?

Yes	1	CONTINUE
No	2	GO TO Q31
DK	3	

IF WENT ON TRIP

Q23 Which of the following would happen if you could not afford to pay for (name) ?

Read out

School would cover cost for (NAME)	1	
(Name) would be unable to go	2	
DK		

IF DID NOT GO ON TRIP (Q21=8)

Q23A Why did (name) not go on the trip?

(Name) did not want to go	1	
Parent did not want child to go	2	
Could not go as made other plans	3	
Could not afford to go	4	
OTHER (SPECIFY)	5	

ASK ALL

Q35 When Parents are informed about school trips, either residential or during school time, are parents invited to discuss any difficulties with paying for the trip with the teacher(s) involved?

Yes – ALWAYS	1	
Yes – SOMETIMES	2	
No - NEVER	3	
DK	4	

Q35A How happy are you with the costs associated with school trips for (name)?

Very happy	1	
Quite happy	2	
Not very happy	3	
Not at all happy	4	
DK / REFUSED	X	

SECTION 5 - ITEMS AND ACTIVITIES

Q41 Thinking about other items and activities, which of the following possible class materials or other lessons for (NAME) have you been asked to pay for in 2003.

READ OUT

	Yes	No	DK
Material or equipment for Sewing classes	1	2	X
Material or equipment for Design & Technology (including Woodwork / Metalwork)	1	2	X
Material or equipment for Cookery	1	2	X
Material or equipment for Art Lessons	1	2	X
Material or equipment for IT lessons	1	2	X
Material or equipment for MUSIC lessons	1	2	X
Text books or revision guides	1	2	X
Swimming Lessons	1	2	X

REPEAT Q42 / Q42A /Q42B FOR EACH ITEM MENTIONED AT Q41 FOR MAX. 3
IF MORE THAN 3 MENTIONED – RANDOMLY SELECT

Q42 How much have you been asked to contribute for (ITEM) in 2003?

WRITE IN _____

Q42A And is that...

Daily / Per Lesson	1	CONTINUE
Weekly	2	
Monthly	3	
Half term	4	
By Term	5	
Yearly	6	
One off cost	7	
DK	X	
Refused	Y	

Q42B Does the school provide (item) for those pupils to use who cannot provide or pay for their own?

Yes	1	
No	2	
DK	3	

ASK ALL WHO HAD TO PROVIDE SOME CLASS MATERIALS

How happy are you with providing payment for items or lessons such as these for (name)?

Very happy	1	
Quite happy	2	
Not very happy	3	
Not at all happy	4	
DK / REFUSED	X	

Q42C And which of these other items were you asked to provide for (name) in 2003?

READ OUT

	Yes
LOOP 1 – ASK 50%	1
Exercise Book or Paper	1
Pencils	2
Note books	3
Calculator	4
LOOP 2 – ASK 50%	
Ruler	5
Geometry Set (including protractor, angled rulers)	6
Pens	7
Pencil Case	8

TRANSPORT

Thinking now about transport...

Q51 How does (Name) usually get to school?

Walk	1	GO TO Q53
Cycle	2	GO TO Q53
Taxi	3	ASK Q51A
Car	4	GO TO Q53
Dedicated School Bus	5	ASK Q51A
Public transport	6	ASK Q51A
OTHER (Please Specify)	7	GO TO Q53

IF PUBLIC TRANSPORT (6) / TAXI (3) / SCHOOL BUS (5)

Q51A Who pays for this travel?

IF SAY FREE – ASK WHO PROVIDES THE FREE SERVICE

Respondent (Parent)	1	
School	2	
LEA	3	
OTHER (Specify)	4	
DK	5	

IF PARENT PAYS

Q52 How much do you pay for this?

WRITE IN _____

Q52A And is that...?

READ OUT

Monthly	1	CONTINUE
Weekly	2	
Single Fare	3	
Other (Please Specify)	4	

SECTION 6 - CONTRIBUTIONS TO THE SCHOOL FUND / CHARITY

Q56 Have you ever been asked to contribute to the school fund on behalf of (name)?

NOTE: SCHOOL FUND MAYBE CALLED GOVERNORS FUND OR PTA FUND

Yes	1	
No	2	
DK	3	

Q57 How much money were you asked to contribute?

WRITE IN

(.....)

Q58 How often is that?

Daily	1	
Weekly	2	
Monthly	3	
Half term	4	
By Term	5	
Yearly	6	
One off payment	7	
DK	X	
Refused	Y	

LOOP 1 – ASK Q60/61/61A FOR 1/3

Q60 Have you been asked by the school to contribute cash or items to charity IN 2003, on behalf of (NAME) for example any “wear what you want days”, Comic Relief or Children in Need events?

Yes	1	
No	2	
DK	3	

Q61 How many times were you asked to contribute to events such as these on behalf of (NAME) in 2003?

INTERVIEWER NOTE: IF UNSURE PROMPT FOR ESTIMATE

Once	1	
Twice	2	
Three time	3	
Four or more	4	
DK	5	

Q61A What was the approximate cost the last time you contributed to an event like this on behalf of (name)?

WRITE IN
(.....)

LOOP 2 – Ask Q62/62A FOR 1/3

SECTION 7 - OTHER ACTIVITIES OR ITEMS

Q62 Were you asked to contribute something else to a school activity such as ingredients for a cake, raffle or jumble sale on behalf of (NAME) in 2003?

MULTICODE

Cake Ingredients	1	
Raffle	2	
Items for Jumble sale	3	
Party food – crisps / drinks / sweets	4	
Other	5	
None	5	

IF ANY MENTION AT Q62

Q62A What was the approximate cost of these items in 2003?

.....

LOOP 3 – ASK Q63/63A FOR 1/3

Q63 Did you buy any school photos of (NAME) in 2003?

Yes	1	
No	2	
DK	3	

IF YES

Q63A What was the cost of School photos for (NAME) in 2003

.....	1	
-------	---	--

ASK ALL

Q64 Are you aware of any assistance that is available from (NAME)'s school with any of the costs we have talked about?

Yes	1	
No	2	
DK	3	

IF YES

Q64A What sort of assistance is available?

Q68 How easy would you say it is for your family to meet all the costs discussed?

Very Easy	1	
Quite Easy	2	
Quite difficult	3	
Very difficult	4	
DK / REFUSED	X	

Q69 Are there any particular costs that you think the school should not ask parents to pay for?

IF YES PROBE FOR WHICH

Uniform	1	
Materials For Classes	2	
School Trips	3	
Stationery Items	4	
Sports Equipment	5	
School Discos / Parties	3	
Christmas Parties	7	
Harvest Festival	8	
Easter Party	9	
School Photos	10	
Other (PLEASE SPECIFY)	11	
None	12	
DK	X	

Q70 Taking everything we have talked about into account, how happy are you with the costs associated with sending (name) to state school?

Very happy	1	
Quite happy	2	
Not very happy	3	
Not at all happy	4	
DK / REFUSED	X	

DEMOGRAPHICS

Q71 For classification purposes only I would now like to ask about annual household income.

Any information given will be in the strictest confidence.

In which of the following bands does your TOTAL annual household income fall before tax is deducted?

READ OUT
SINGLE CODE

Less than 3000 pounds per year	1	
3000 pounds-5,999 pounds per year	2	
6,000 pounds - 9,999 pounds per year	3	
10,000 pounds - 14,999 pounds per year	4	
15,000 pounds - 24,999 pounds per year	5	
25,000 pounds - 34,999 pounds per year	6	
35,000 - 49,999 pounds per year	7	
50,000 or more per year	8	
DK	9	
REFUSED		

Q72 Can I just check your legal marital status? Are you...

READ OUT AND CODE FIRST TO APPLY
IF COHABITING AND NEVER PREVIOUSLY MARRIED, CODE 1

Single – that is never married	1	
Married and living with husband or wife	2	
Married and separated from husband or wife	3	
Divorced	4	
Widowed	5	
Don't Know	X	
Refused	R	

Q73 Including (name) how many children aged under 18 who live in this household are financially dependent on you?

1	1	
2	2	
3	3	
4	4	
5	5	
6	6	
7	7	
8 or more	8	
Don't Know	X	
Refused	R	

Q75 Which of the following groups do you belong to?

READ OUT

White	1
Black or Black British	2
Asian or Asian British	3
Mixed	4
Any other ethnic group	5
Don't Know	X
Refused	R

Q75A Please can you tell me your ethnic group

White: British	1
White: Irish	2
White: Other white background	3
Mixed: White and black Caribbean	4
Mixed: White and black African	5
Mixed: White and Asian	6
Mixed: Other mixed background	7
Asian or Asian British: Indian	8
Asian or Asian British: Pakistani	9
Asian or Asian British Bangladeshi	10
Asian or Asian British Other Asian background	11
Black or Black British: Caribbean	12
Black or Black British African	13
Black or Black British: Other black background	14
Chinese	15
Don't know	17
Refused	18

Q76 How many people live in the household including yourself?

WRITE IN

Q77 Which member of your household would you say is the Chief Income Earner - that is the person with the largest income, whether from employment, pensions, state benefits, investments or any other sources?

Respondent	1
Respondent's Spouse/Partner	2
Respondent's Mother/Father (in law)	3
Respondent's Son/Daughter (in law)	4
Respondent's Brother/Sister (in law)	5
Respondent's Other relative	6
Other person	7
Refused/not stated	8

ESTABLISH WHO IS THE HOUSEWIFE (I.E. THE PERSON MOSTLY RESPONSIBLE FOR THE SHOPPING, COOKING, CLEANING ETC.) AND CODE BELOW.

Respondent	1
Respondent's Spouse/Partner	2
Respondent's Mother/Father (in law)	3
Respondent's Son/Daughter (in law)	4
Respondent's Brother/Sister (in law)	5
Respondent's Other relative	6
Other person	7
Refused/not stated	x

Q78 Do you yourself work ... READ OUT LIST

Thirty hours or more per week	1
Less than thirty hours per week	2
Are you retired from a full time job	3
Or are you not working for some other reason	4
(DON'T READ OUT) Refused/not stated	5

Q79 And thinking about ... (CHIEF INCOME EARNER) does he/she work ...

READ OUT LIST

Thirty hours or more per week	1
Less than thirty hours per week	2
Are you retired from a full time job	3
Or are you not working for some other reason	4
(DON'T READ OUT) Refused/not stated	5

Establish whether the C.I.E. is ...?

Thirty hours or more per week	1
Less than thirty hours per week	2
Retired, gets pension from previous job	3
Unemployed 2 months or less	4
Sick - still receiving pay or statutory pay from job	5
Widow receiving pension from husbands previous job	6
Divorced / separated receiving maintenance from ex-husband	7
Full time student	8
Not working - with private means	9
Unemployed more than 2 months	10
Sick - only receiving income support	11
Receiving State pension/benefits only	12
Refused	

NOW COLLECT DETAILS OF THE CHIEF INCOME EARNER

Q81 Is the work manual/non manual?

Manual	1
Non manual	2
Don't Know	3
Refused	X

Q82 Is CIE an employee or self employed?

Employed	1
Self employed	2
Don't Know	3
Refused	X

Q83 How many people work at the same place?

(.....)

Q84 How many people CIE responsible for?

(.....)

Q85 At what time did you finish your full time education?

14	1
15	2
16	3
17	4
18	5
19	6
20	7
21	8
22	9
23	10
24	11
Still studying	12
Refused / Not stated	X

ASK ALL

Q86 Do you own your house/flat, or rent it, or do you live here rent free?

Owned	1
Rented	2
Rent free	3
Refused/not stated	X

IF OWNED

Q87 Is it owned outright or is it being bought with a mortgage or loan?

Owned outright	1
Mortgage / Loan	2
Don't Know	3
Refused	X

IF RENTED

Q88 Is it rented from the council or from someone else?

Council	1
Someone else	2
Don't Know	3
Refused	X

CODE SOCIAL GRADE HERE

A	1
B	2
C1	3
C2	4
D	5
E	6
NOT STATED/DON'T KNOW	X
REFUSED INFORMATION	Y

THANK AND CLOSE

Appendix E(5)

Introduction letter sent to schools (prior to fieldwork)

COST OF SCHOOLING SURVEY

Dear <Name>,

BMRB Social Research has been commissioned by the Department for Education and Skills to carry out a survey of schools in the state sector to try to establish the additional costs to parents for their child's education. The research aims to capture the full range of items and activities that schools asked parents to pay for or contribute towards in 2003. These include both expenses that were school-wide and department-specific.

In recognition of the fact that there will be some staff time required to collate and enter the information we need, **we are offering £<XX> as a contribution to the school** for all completed forms we receive by the closing date.

The survey can either be completed on paper, using the questionnaire included in this pack, or online (details overleaf).

Please make sure you complete the questionnaire and return it by **2nd April 2004**

Please note that any answers given will remain be confidential. Only members of BMRB's research team will have access to responses and any data passed on to the Department for Education and Skills will be in the form of aggregated data. It will not be possible to identify any particular school or individual taking part. BMRB operates according to the Market Research Society code of conduct. If you want to check BMRB's credentials you can call the MRS Society Free-phone number 0500 396999.

We recommend that one person should co-ordinate the completion of the questionnaire, although they will probably need to consult colleagues for department specific details.

If you want to complete the paper questionnaire Guidance for completing the paper questionnaire can be found on the questionnaire itself.

If you want to complete the online questionnaire

If you would prefer to complete the questionnaire online, you can go to the secure website allocated for this survey. :

www.costofschooling.co.uk

There you will be asked to enter a password. This is the serial number that appears in the top left hand corner of this letter. This password protection means that no unauthorised person will be able to access your school's details and amend them.

You do not have to enter all the information at once - indeed, it is likely that you will want to check some details with colleagues. You can go back into the site to check or amend details as many times as you like, but you will need the password each time. When you have finalised your answers you can approve them online and they will be sent to BMRB.

Please submit the form by 2nd April 2004

If you have any questions or would like to know more about this project please contact either:

XX or XX

Any queries about how to complete the questionnaire should be directed to BMRB. I sincerely hope you will find the time to take part in this important survey.

Yours sincerely,

Appendix E (6)

Reminder letter to schools

COST OF SCHOOLING SURVEY

Dear <Name>,

A short while ago you should have received a letter and a questionnaire for a survey that BMRB are carrying out on behalf of the Department for Education and Skills into the costs to parents associated with sending their children to state schools.

Our records show we are yet to receive a completed questionnaire from this school and we would like to again ask for your help with the survey. It is very important that as many schools as possible take part in the research to allow us to build a complete picture of what parents are asked to pay for.

We are aware that school staff are very busy and in recognition of this we are offering **£<xx> to schools for all completed questionnaires** returned to us by the closing date.

If you still have the original questionnaire please could you find the time to complete it and return it to us by **2nd April 2004**.

If you need a new questionnaire then please call me on 020 8433 4258 and a new pack will be sent to you.

It is also possible to complete the questionnaire online at the secure website www.costofschooling.co.uk. Instructions for completing the online survey can be found overleaf.

Please be assured that any answers given will remain be confidential. Only members of BMRB's research team will have access to responses and any data passed on to the Department for Education and Skills will be in the form of aggregated data only. It will not be possible to identify any particular school or individual taking part.

If you have already returned your questionnaire then please ignore this reminder and thank you for taking part. Please note we can only accept one completed questionnaire from each school.

If you want to complete the online questionnaire

If you would prefer to complete the questionnaire online, you can go to the secure website allocated for this survey. :

www.costofschooling.co.uk

There you will be asked to enter a password. This is the serial number that appears in the top left hand corner of this letter. This password protection means that no unauthorised person will be able to access your school's details and amend them.

You do not have to enter all the information at once - indeed, it is likely that you will want to check some details with colleagues. You can go back into the site to check or amend details as many times as you like, but you will need the password each time. When you have finalised your answers you can approve them online and they will be sent to BMRB.

Please submit the form by 2nd April 2004

If you have any questions or would like to know more about this project please contact either:

XX or XX

Any queries about how to complete the questionnaire should be directed to BMRB, as should any requests for replacement questionnaire packs.

I hope you will find the time to take part in this important survey.

Yours sincerely,

Appendix E (7)

Schools Questionnaire (Self completion format)

SURVEY OF THE COST OF SCHOOLING

Notes for completion of the paper form

Please complete the questions as instructed. Wherever possible, we have tried to make it easy to fill in the information requested by having pre-coded answers lists.

Some questions require a single answer, others can have multiple responses. This should be clear in the instructions for each question - for example, an instruction to "cross one box only" or to "cross all that apply".

Contacts

If you have a query about the survey, you can contact:

XX BMRB Social Research or XX Department for Education and Skills

XX@BMRB.co.uk

XX@dfes.gsi.gov.uk

QUERIES ABOUT COMPLETING THE QUESTIONNAIRE SHOULD GO TO BMRB IN THE FIRST INSTANCE

Add Name of school ()

BMRB Number ()

Serial Number ()

INFORMATION ABOUT THE SCHOOL

A1 Is the school a faith school? *Please cross (x) one box only*

	No	<input type="checkbox"/>
Yes: Christianity - Anglican/Church of England		<input type="checkbox"/>
Yes: Christianity - Roman Catholic		<input type="checkbox"/>
Yes: Other Christian - please specify _____		<input type="checkbox"/>
Yes: Other faith - please specify _____		<input type="checkbox"/>

A2 Are parents asked to contribute to any type of fund (e.g. school fund, PTA fund etc.)?

Please cross (x) one box only

Yes <input type="checkbox"/>	No <input type="checkbox"/>	Don't Know <input type="checkbox"/>
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IF YES

A3 How much are parents asked to contribute per child?(in £).

A4 Is this money paid...

Please cross (x) one box only

Yearly <input type="checkbox"/>	Half-termly <input type="checkbox"/>	Weekly <input type="checkbox"/>
Termly <input type="checkbox"/>	Monthly <input type="checkbox"/>	Other <input type="checkbox"/>

A5 What is this fund used for?

Please cross (x) all boxes that apply

To support school events	<input type="checkbox"/>	To support school trips	<input type="checkbox"/>
To support school sports	<input type="checkbox"/>	To provide uniforms and equipment for children from more deprived families	<input type="checkbox"/>
To contribute to the cost of school equipment	<input type="checkbox"/>	To provide books for school library	<input type="checkbox"/>
To contribute to the cost of school maintenance	<input type="checkbox"/>	Insurance	<input type="checkbox"/>
To contribute to the cost of additions to school buildings	<input type="checkbox"/>	Other (please specify) _____	<input type="checkbox"/>

A6 Is this payment:

Please cross (x) one box only

Voluntary for parents?	<input type="checkbox"/>	Compulsory for parents?	<input type="checkbox"/>	Don't Know	<input type="checkbox"/>
------------------------	--------------------------	-------------------------	--------------------------	------------	--------------------------

A7 What happens if parents are unable to pay for school fund?

What implications are there for the school and pupils?

SECTION B - Stationery

B1 From the following list of stationery items for general school use, which does the school provide and which are the pupils expected to supply?

Please cross (x) all boxes that apply

	School provide	Pupils provide	Cost to parent in typical year (£ approx)
Note books	<input type="checkbox"/>	<input type="checkbox"/>	
Pencils	<input type="checkbox"/>	<input type="checkbox"/>	
Ruler	<input type="checkbox"/>	<input type="checkbox"/>	
Pens	<input type="checkbox"/>	<input type="checkbox"/>	
Colouring pencils	<input type="checkbox"/>	<input type="checkbox"/>	
Rubber	<input type="checkbox"/>	<input type="checkbox"/>	
Calculator	<input type="checkbox"/>	<input type="checkbox"/>	
Other: _____	<input type="checkbox"/>	<input type="checkbox"/>	

SECTION C - School Uniform

C1 PLEASE COMPLETE THIS SECTION IF SCHOOL REQUIRES PUPILS TO HAVE SCHOOL UNIFORM
 IF NO SCHOOL UNIFORM AT SCHOOL PLEASE TICK HERE : AND GO TO SECTION D

Please list the following details:

- A.** Are Pupils required to wear uniform, if so which items are required and which are optional?
B. Do these items have to be purchased from a specific supplier?
C. How much do these items cost – **PER ITEM**?
D. Is this an estimate or an exact cost?

	A			B. Specific supplier		C	D. Estimate or exact?	
	Required	Optional	Not required	Yes	No	Price (£)	Est.	Exact
Sweatshirt/jumper/cardigan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Blouse/shirt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Trousers/skirt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Dress/pinafore	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Shorts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Blazer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Tie	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Specific type of shoes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Specific type of coat	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Bag	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Specific type of socks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Cap/Hat	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Specific scarf	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Badges	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>

C2 Is there a different uniform requirement for different year groups? If so what are they?

C3 What happens if a pupil comes to school without school uniform?

Please cross (x) all boxes that apply

No action <input type="checkbox"/>	Pupil withdrawn from class <input type="checkbox"/>
Pupil receive verbal warning <input type="checkbox"/>	Pupil sent home <input type="checkbox"/>
Warning letter sent home <input type="checkbox"/>	Pupil loaned a uniform <input type="checkbox"/>
Pupil receive detention <input type="checkbox"/>	Other: <input type="checkbox"/>

C4 If a pupil's family cannot afford new uniform are any of the following types of assistance available to them? If so, is the service publicised to parents by the school?
Please cross (x) all boxes that apply

	Is available			Is publicised			Frequency of usage (e.g. how many times in 2003)
	Yes	No	Don't know	Yes	No	Don't know	
LEA Grant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
School provides second hand uniform free of charge	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
School offer second hand uniform at reduced price	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
School/PTA fund	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Local Charity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Other:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

SECTION D - Sports kit

PLEASE COMPLETE THIS SECTION IF SCHOOL REQUIRES PUPILS TO HAVE SPORTS KIT

IF NO SPORTS KIT REQUIRED AT SCHOOL PLEASE TICK HERE : AND GO TO NEXT SECTION

Please list the following details:

- A.** Are Pupils required to wear sports kit for PE lessons, if so which items are required and which are optional?
- B.** Do these items have to be purchased from a specific supplier?
- C.** How much do these items cost – **PER ITEM?**
- D.** Is this an estimate or an exact cost?

D1

	A			B. Specific supplier		C	D. Estimate or exact?	
	Required	Optional	Not required	Yes	No	Price (£)	Est.	Exact
Shorts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
T-shirt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Full tracksuit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Jogging bottoms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Tracksuit top	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Jumper	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Trainers or plimsolls	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Football/rugby shirt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Netball skirt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Swimming costume	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Football/rugby/hockey boots	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Other _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>

D2 What happens if a pupil fails to provide an item of sports kit?*Please cross (x) all boxes that apply*

No action	<input type="checkbox"/>	Pupil withdrawn from class	<input type="checkbox"/>
Pupil receives verbal warning	<input type="checkbox"/>	Pupil sent home	<input type="checkbox"/>
Warning letter sent home	<input type="checkbox"/>	Pupil loaned an item	<input type="checkbox"/>
Pupil receives detention	<input type="checkbox"/>	Other: _____	<input type="checkbox"/>

SECTION E – SUBJECT / DEPARTMENT REQUIREMENTS

- For this section please complete for each department at the school. If no materials are asked for or expected to be provided by pupils please answer NULL
- If any day or residential trips are organised by the department :
Please remember to record them in the next section (section F)

E1 HUMANITIES

Please list details of materials pupils are asked or expected to supply, such as Text books, Atlas or other class materials. Please also record whether it is compulsory for them to supply these items, whether the school supplies items if pupils do not and the approximate cost. If no materials are expected to be supplied by pupils, please write in NONE

	Recommended or Compulsory?			Supplied by school if necessary (y/n)?		Approximate cost (£)
	Compulsory	Recommended	Not Required	Yes	No	
Text Books	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Revision Guides	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Atlas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Other (write in)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Other (write in)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

E2 Are pupils ever excluded from taking part in lessons if they do not provide these materials?*Please cross (x) one box only*

Yes <input type="checkbox"/>	No <input type="checkbox"/>
------------------------------	-----------------------------

E3 MATHS

Please list details of materials pupils are asked or expected to supply, such as Text books, Geometry set or other class materials.

Please also record whether it is compulsory for them to supply these items, whether the school supplies items if pupils do not and the approximate cost. If no materials are expected to be supplied by pupils, please write in NONE.

	Recommended or Compulsory?			Supplied by school if necessary (y/n)?		Approximate cost (£)
	Compulsory	Recommended	Not Required	Yes	No	
Text Books	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Revision Guides	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Geometry set	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Other (write in)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Other (write in)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

E4 Are pupils ever excluded from taking part in lessons if they do not provide these materials?

Please cross (x) one box only

Yes <input type="checkbox"/>	No <input type="checkbox"/>
------------------------------	-----------------------------

E5 ENGLISH

Please list details of materials pupils are asked or expected to supply, such as Text books, Revision guides or other class materials.

Please also record whether it is compulsory for them to supply these items, whether the school supplies items if pupils do not and the approximate cost. If no materials are expected to be supplied by pupils, please write in NONE.

	Recommended or Compulsory?			Supplied by school if necessary (y/n)?		Approximate cost (£)
	Compulsory	Recommended	Not Required	Yes	No	
Text Books	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Revision Guides	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Other (write in)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Other (write in)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

E6 Are pupils ever excluded from taking part in lessons if they do not provide these materials?

Please cross (x) one box only

Yes <input type="checkbox"/>	No <input type="checkbox"/>
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E7 SCIENCE

Please list details of materials pupils are asked or expected to supply, such as Text books, Lab coats or other class materials.

Please also record whether it is compulsory for them to supply these items, whether the school supplies items if pupils do not and the approximate cost. If no materials are expected to be supplied by pupils, please write in NONE.

	Recommended or Compulsory?			Supplied by school if necessary (y/n)?		Approximate cost (£)
	Compulsory	Recommended	Not Required	Yes	No	
Text Books	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Revision Guides	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Lab Coats	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Other (write in)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Other (write in)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

E8 Are pupils ever excluded from taking part in lessons if they do not provide these materials?

Please cross (x) one box only

Yes <input type="checkbox"/>	No <input type="checkbox"/>
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E9 DESIGN/TECHNOLOGY

Please list details of materials pupils are asked or expected to supply, such as Text books or other class materials.

Please also record whether it is compulsory for them to supply these items, whether the school supplies items if pupils do not and the approximate cost. If no materials are expected to be supplied by pupils, please write in NONE.

	Recommended or Compulsory?			Supplied by school if necessary (y/n)?		Approximate cost (£)
	Compulsory	Recommended	Not Required	Yes	No	
Text Books	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Revision Guides	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Other (write in)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Other (write in)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

E10 Are pupils ever excluded from taking part in lessons if they do not provide these materials?

Please cross (x) one box only

Yes <input type="checkbox"/>	No <input type="checkbox"/>
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E11 ICT

Please list details of materials pupils are asked or expected to supply, such as Text books, floppy disks, CDs or other class materials. Please also record whether it is compulsory for them to supply these items, whether the school supplies items if pupils do not and the approximate cost. If no materials are expected to be supplied by pupils, please write in NONE.

	Recommended or Compulsory?			Supplied by school if necessary (y/n)?		Approximate cost (£)
	Compulsory	Recommended	Not Required	Yes	No	
Text Books	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Revision Guides	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Disks / CDs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Other (write in)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Other (write in)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

E12 Are pupils ever excluded from taking part in lessons if they do not provide these materials?

Please cross (x) one box only

Yes <input type="checkbox"/>	No <input type="checkbox"/>
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E13 ART AND DESIGN

Please list details of materials pupils are asked or expected to supply, such as pencils, brushes, paper or other class materials.

Please also record whether it is compulsory for them to supply these items, whether the school supplies items if pupils do not and the approximate cost. If no materials are expected to be supplied by pupils, please write in NONE.

	Recommended or Compulsory?			Supplied by school if necessary (y/n)?		Approximate cost (£)
	Compulsory	Recommended	Not Required	Yes	No	
Text Books	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Revision Guides	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Paper	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Pencils	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Brushes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Other (write in)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Other (write in)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

E14 Are pupils ever excluded from taking part in lessons if they do not provide these materials?

Please cross (x) one box only

Yes <input type="checkbox"/>	No <input type="checkbox"/>
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E15 FOREIGN LANGUAGES

Please list details of materials pupils are asked or expected to supply, such as Text books, dictionaries or other class materials.

Please also record whether it is compulsory for them to supply these items, whether the school supplies items if pupils do not and the approximate cost. If no materials are expected to be supplied by pupils, please write in NONE.

	Recommended or Compulsory?			Supplied by school if necessary (y/n)?		Approximate cost (£)
	Compulsory	Recommended	Not Required	Yes	No	
Text Books	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Revision Guides	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Dictionaries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Other (write in)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Other (write in)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

E16 Are pupils ever excluded from taking part in lessons if they do not provide these materials?

Please cross (x) one box only

Yes <input type="checkbox"/>	No <input type="checkbox"/>
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E17 MUSIC

Please list details of materials pupils are asked or expected to supply, such as instrument hire costs or other class materials.

Please also record whether it is compulsory for them to supply these items, whether the school supplies items if pupils do not and the approximate cost. If no materials are expected to be supplied by pupils, please write in NONE.

	Recommended or Compulsory?			Supplied by school if necessary (y/n)?		Approximate cost (£)
	Compulsory	Recommended	Not Required	Yes	No	
Text Books	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Revision Guides	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Instrument costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Sheet Music	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Other (write in)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

E18 Are pupils ever excluded from taking part in lessons if they do not provide these materials?

Please cross (x) one box only

Yes <input type="checkbox"/>	No <input type="checkbox"/>
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E19 Are pupils offered extra-curricular musical instrument lessons?

Please cross (x) one box only

Offered by school - free to all pupils <input type="checkbox"/>	Offered by school - charge to some pupils <input type="checkbox"/>	Offered by school - charge for all pupils <input type="checkbox"/>	No – not offered by school at all <input type="checkbox"/>
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SECTION F - School Trips

Please answer next questions for school as a whole

F1 Please list details of Residential or Day Trips organised by the school in 2003 and indicate whether the trip was compulsory, whether it was part of curriculum, what the approx. cost (if any) of the trip was and whether parents were given the option of paying by instalment.

Brief description of trip	Compulsory (y/n)		Curriculum (y/n)		Type of Trip		Approximate cost (£) PER CHILD	Instalments allowed (y/n)	
	Yes	No	Yes	No	Day	Residential		Yes	No
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>

F2 What happens if a child cannot afford to go on a trip organised as part of curriculum?

Please cross (x) all boxes that apply

School Fund pays <input type="checkbox"/>	Loan to parents offered <input type="checkbox"/>
School or PTA apply for grant from educational trust <input type="checkbox"/>	Nothing - child does not go on trip <input type="checkbox"/>

F3 How much notice is typically given to parents about school trips?

Day:	Residential:
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F4 Does the school provide parents with the option of meeting school staff to talk about paying for trip? If yes, how is this done?

Please cross (x) all boxes that apply

No opportunity provided to talk about trip <input type="checkbox"/>
Invited to in the letter to parents advising of trip <input type="checkbox"/>
Mentioned informally e.g. Parents evenings <input type="checkbox"/>
Other _____ <input type="checkbox"/>

SECTION G - FINANCIAL ASSISTANCE

G1 Is there any provision for financial assistance for parents who struggle to meet the costs associated with schooling such as money for class materials or school trips?

Please cross (x) all boxes that apply

	None	<input type="checkbox"/>
	From School fund	<input type="checkbox"/>
	From LEA	<input type="checkbox"/>
	From Charity	<input type="checkbox"/>
	From Other sources _____	<input type="checkbox"/>

SECTION H - SCHOOL MEALS

H1 Which of the following options are available to pupils for lunch?

Please cross (x) all boxes that apply

	School Meal - set menu	<input type="checkbox"/>
	School Meal - Canteen	<input type="checkbox"/>
	Packed Lunch	<input type="checkbox"/>
	Off School (e.g. allow to go to food outlet off-site)	<input type="checkbox"/>

IF SCHOOL MEALS PROVIDED BY SCHOOL (OTHERS GO TO SECTION I) :

H2 What is the typical cost of a school meal?

H3 How much is allowed for a free school meal?

H4 How is the administration for Free school meals organised?

	Parents invited to apply via letter from school	<input type="checkbox"/>
	Process detailed in Prospectus given to parents	<input type="checkbox"/>
	Left to parent to initiate - no advertising as such	<input type="checkbox"/>
	LEA provide information	<input type="checkbox"/>
	Informally e.g. parents evening	<input type="checkbox"/>
	Don't Know	<input type="checkbox"/>

SECTION I - OTHER EXPENSES

11 How many charity days or Non uniform days were held during 2003?

12 What is the typical cost for parents for events such as these - per event?

13 How many times in 2003 were School Photographs offered to parents?

Please cross (x) one box only

None <input type="checkbox"/>	Once <input type="checkbox"/>	Twice <input type="checkbox"/>	3 times or more <input type="checkbox"/>
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14 What is the approximate cost for the basic package of school photos (£)?

15 Are swimming lessons provided by the school?

Please cross (x) one box only

Yes - to ALL year groups <input type="checkbox"/>	Yes to SOME year groups <input type="checkbox"/>	No <input type="checkbox"/>
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IF SWIMMING LESSONS PROVIDED BY THE SCHOOL

16 Is there a charge for swimming lessons provided by the school? If so, how much per child, per lesson?

Yes to ALL year groups taking swimming lessons COST: <input type="checkbox"/> _____	Yes, to SOME year groups taking swimming lessons COST: <input type="checkbox"/> _____	No - free to all taking swimming lessons <input type="checkbox"/>
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Contact person

Please provide the name and the contact details of a person who could answer any questions we might have about the information provided.

Name :

Position :

Telephone :

Fax :

E-mail :

Payment details

Please give details of the account name to which we should make the cheque payable. This will be sent about one week after receipt of the completed questionnaire.

Serial Serial number

Appendix E (8)

Schools telephone chase questionnaire (CATI)

Intro

Good morning/afternoon. My name is ... calling from the British Market Research Bureau, an independent market research company.

A short while ago we sent (NAME OF CONTACT) a letter and a questionnaire for a survey that BMRB are carrying out on behalf of the Department for Education and Skills into the cost of schooling.

Can I speak to (NAME OF CONTACT)

IF NOT AVAILABLE

Do you know who the best person is to speak to about this research?

Q1 INTERVIEWER : PLEASE CODE WHICH RESPONDENT SPEAKING TO:

Named Contact	1
New Contact	2

Q2 A short while ago you should have received a letter and a questionnaire outlining what the survey was about.

Do you remember the letter we sent about the survey?

Yes	1
No	2
Don't Know	3

IF 2 = Yes

THEN ASK: 3

Q3 According to our records we haven't received a completed questionnaire yet from your school and we would like to again ask for your help with the survey.

It is very important that as many schools as possible take part in the research to allow us to build a complete picture of what parents are asked to pay for.

We are aware that school staff are very busy and in recognition of this we are offering &xpays to each school that returns a completed questionnaire.

If you still have the original questionnaire please could you find the time to complete it and return it to us by 2nd April 2004?

IF NECESSARY

If you need a new questionnaire then I can arrange for a new one to be sent out to the school

YES - Already completed it	1
YES - Agree to do it / in process of doing it	2
YES - Agree to do it but need a new questionnaire sending out	3
Refused / will not take part	X

IF 2 = No OR 2 = Don't Know
Q4 BMRB Social Research has been commissioned by the Department for Education and Skills to carry out a survey of schools in the state sector to try to establish the additional costs to parents for their child's education. We wrote to the school last month explaining about the research.

We are aware that school staff are very busy and in recognition of this we are offering &xpay& to each school that returns a completed questionnaire.

The survey can either be completed on paper or online.

IF NECESSARY

The research aims to capture the full range of items and activities that schools asked parents to pay for or contribute towards in 2003. These include both expenses that were school-wide and department-specific.

IF WANT DETAILS OF ONLINE SURVEY:

The survey is available online at the secure website www.costofschooling.co.uk. The details of how to complete the survey online will be sent to you along with the questionnaire

Would you be able to help us with this important survey?

IF NECESSARY: If you need a new questionnaire then I can arrange for a new one to be sent out to the school

REASSURANCES IF NECESSARY

Please be assured that any answers given will remain be confidential.

Only members of BMRB's research team will have access to responses and any data passed on to the Department for Education and Skills will be in the form of aggregated data only.

It will not be possible to identify any particular school or individual taking part.

Yes - Agree to do it and have questionnaire	1
Yes - Agree to do it but need new pack	2
Need to speak to someone else at school	3
No, Refuse to help / Opt out	X
Want more details	5

IF 4 = Yes - Agree to do it but need new pack OR 4 = Want more details OR 3 = YES - Agree to do it but need a new questionnaire sending out - ASK Q5
Q5 Can I just record your contact details so I can send out a new pack?

Thank you very much for agreeing to take part. Your new pack will be dispatched in the next few days.

Please make sure you return it to us by Friday 2nd April 2004.

Thank you very much for taking part.

IF RESPONDENT CONCERNED WE HAVEN'T RECEIVED QRE

It could be that your questionnaire is in the process of being booked in. We will check and make sure we have received it

IF Q 4 = Yes - Agree to do it and have questionnaire OR 3 = YES - Agree to do it / in process of doing it - ASK Q6

Q6 Thank you very much for agreeing to take part, we look forward to receiving your questionnaire.
Please return it to us by 2nd April 2004

**IF 4 = No, Refuse to help / Opt out OR 3 = Refused / will not take part
ASK Q7**

Q7 Can I just ask for the reasons you cannot take part?

CODE REASON

REFUSED - NO TIME	1
REFUSED - NOT INTERESTED	2
REFUSED - SHORT STAFFED	3
REFUSED - TRIED TO DO SURVEY BUT UNABLE TO COMPLETE	4
Refused to give reasons	Z
Other (specify)	0

THANK AND CLOSE

Appendix E (9)

Access to Youth Questionnaire

Q1 Do you attend a state school – that is one where your parents do not have to pay school fees?

Yes	1
No	2
Not sure	3

ASK IF Q1 NOT= code 2

Q2 Schools sometimes ask parents for money for things like school trips, school parties or charity days. When the school asks your parents for money for these sorts of things, do you give the letter to your parents...

Always?	1
Most of the time?	2
Not very often?	3
Never?	4
School never asks for contribution of any kind	5

IF NOT ALWAYS (code 1) at Q2

Q3 Why is this? DO NOT PROMPT. PROBE AND CODE ALL RESPONSES GIVEN

PROBE:

Why do you sometimes not give a letter to your parent(s)?

IF STUCK

Can you remember why you didn't pass it on last time?

Forgot	1
Didn't want to go on trip or take part	2
Parent didn't want me to go	3
Thought that my parent would not be able to afford it	4
Other, specify	5

ASK ALL RESPONDING CODE 1 or CODE 3 AT Q1

Q4 What would happen if the school asked your parents for money for something and they couldn't afford it?

PROBE

- how would you feel? - has this ever happened? - would you try not to tell your parents about it?
- Would you say you didn't want to take part in activity?

ASK ALL RESPONDING CODE 1 or CODE 3 AT Q1

Q5 I'm now going to ask whether you agree with this comment...

	Definitely agree	Tend to agree	Tend to disagree	Definitely disagree
Sometimes, my parents find it difficult to afford things that we need	1	2	3	4

F: Statutory legislation and guidance

School Meals (Section 512 of the Education Act 1996, as replaced by section 201 of the Education Act 2002; Statutory Instrument 2003 No.383 The Education (Free School Lunches)(Prescribed Tax Credits)(England) Order 2003)

Local Education Authorities or, where the budget for school meals is delegated to them, a school's governing body have a duty to provide free school lunches to eligible pupils. Free school lunch eligibility is limited to children whose parents receive: Income Support; Income Based Jobseekers Allowance; support under part VI of the Immigration and Asylum Act 1999; or Child Tax Credit, provided they do not also receive Working Tax Credit and have an annual income (as assessed by the Inland Revenue) that does not exceed £13,480.

In addition they have a duty to provide a 'paid for' lunch where one is requested, by or on behalf of a pupil."

School Travel (http://www.dfes.gov.uk/leagateway/docs/DfES_Leagateway_document_104.xls)

Pupils aged 5-16 are entitled to free transport if the nearest suitable school is beyond the statutory walking distance, which is 2 miles for pupils aged up to 7 and 3 miles for those aged 8 and over. This distance is measured by the shortest route along which a child, accompanied as necessary, may walk in reasonable safety. Free transport might be necessary for a 5 – 16 year-old who lives within walking distance of school, or who does not attend the nearest suitable school; it is for an LEA to consider such a case on its merits.

School Uniform Guidance (DfES/0569/2004)

School governing bodies are responsible for deciding whether their school should have a uniform policy, and if so, what it should consist of. The Headteacher's role is to ensure pupils comply with the uniform policy agreed by the governing body. Parents should raise any complaints about school uniform/dress codes with the governing body of their school. School Governors should be receptive to any reasonable complaint.

Cost of School Uniform

In deciding the format of their school uniform, the Department expects school governing bodies to give high priority to cost considerations. No school uniform should be so expensive as to leave pupils or their families feeling socially excluded. This applies both to existing and prospective pupils. It is not acceptable for parents of prospective pupils to be deterred from applying to the school of their choice because they are unable to meet the cost of its school uniform. This situation cuts across the Government's aims of supporting parental preference and preventing social exclusion.

Existing school uniform policies may require families to purchase "designer" items, particularly high cost garments such as blazers that are only available from one supplier. It is much better practice, and just as effective, to have a policy that incorporates items that are readily available "off the peg" from a number of retail outlets. This enables parents to shop around for the most cost effective options, whilst ensuring their child adheres to their school's uniform code.

When setting a uniform policy the Department expects school governing bodies to behave reasonably, considering the impact of their policies on parents and pupils. Governing bodies should consult parents for their views and concerns before deciding on the introduction of a new uniform policy/dress code, or amending an existing one. The Department particularly expects Governors to be receptive to parents' complaints, and handle them respectfully, considering fully the issues they raise. Governors should aim to work with parents to arrive at a mutually acceptable outcome.

Physical Education

School uniform often includes clothing required for physical education. Schools should adopt a sensitive, flexible approach to this issue. There is some evidence to suggest that participation and enjoyment of sport is enhanced where pupils feel comfortable about their PE uniform. This is particularly true for girls. Schools should choose a PE uniform, which is practical, comfortable and appropriate to the activity involved. Sex and race discrimination issues must also be considered. The cost of clothing for physical education activities can prove expensive and schools should be mindful of this in setting school policy.

Non-Compliance with a School's Uniform Policy

Head teachers can discipline pupils for breach of uniform policy. However, the Department does not consider exclusion to be an appropriate response to breaches of school uniform policy, except where it is part of a pattern of defiant behaviour generally.

Schools should be considerate and discreetly try to establish why a pupil is not adhering to their uniform policy. If it is because parents are in financial difficulties, schools should be sensitive to the needs of the pupil and give their parents time to purchase the required items.

Pupils should not be made to feel uncomfortable, nor discriminated against, because their parents are unable to provide them with the required items of school uniform.

Equality Issues

School governors should have regard to their responsibilities under the Sex Discrimination Act 1975, the Human Rights Act 1998 and the Race Relations Act 1976. In addition, from May 2002 the Race Relations Amendment Act requires schools to have a race equality policy. This requires them to assess the impact of all their policies, including uniform/dress codes, on children.

Cultural, Race and Religious Requirements

Whilst pupils must adhere to a school's uniform policy, schools must be sensitive to the needs of different cultures, races and religions. The Department expects schools to accommodate these needs, within a general uniform policy. For example, allowing Muslim girls to wear appropriate dress and Sikh boys to wear traditional headdress.

The Department does not consider it appropriate that any pupil should be disciplined for non-compliance with a school uniform policy, which results from them having to adhere to a particular cultural, race or religious dress code.

Sex Discrimination Issues

Schools should ensure that their uniform policy does not discriminate on the grounds of gender, for example girls should normally be allowed to wear trousers. Uniform rules should not disadvantage one gender compared with the other.

Home to School Travel

Schools should be aware of the need to encourage children to walk and cycle to school and should consider this when determining the design and style of uniform. School uniforms are often quite dark making it difficult for children to be seen by drivers especially during the winter months, school governors should consider this, and the possible inclusion of light colours and reflective materials as part of the uniform.

CHARGING FOR SCHOOL ACTIVITIES

(taken from the "Guide to the Law for School Governors : GTT LC 2004" published in July 2004 covering charging for school activities)

EDUCATION DURING SCHOOL HOURS

No charge can be made for admitting pupils to maintained schools. Education provided during school hours must be free. This includes materials, equipment, and transport provided in school hours by the Local Education Authority (LEA) or by the school to carry pupils between the school and an activity. 'School hours' are those when the school is actually in session, and do not include the break in the middle of the school day. Parents and others have a right to information about school hours, and this information must be included in prospectuses published by the school.

MUSICAL INSTRUMENT TUITION

There is an exception to the rule about not charging for activities in school hours. Charges may be made for teaching either an individual pupil, or groups of up to four, to play a musical instrument, if the teaching is not an essential part of either the National Curriculum or a public examination syllabus being followed by the pupil.

VOLUNTARY CONTRIBUTIONS

Although schools cannot charge for school-time activities, they may still invite parents and others to make voluntary contributions (in cash or in kind) to make school funds go further. All requests to parents for voluntary contributions must make it quite clear that the contributions would be voluntary. Governing bodies should also make it clear that children of parents who do not contribute will not be treated any differently. If a particular activity cannot take place without some help from parents, that should be explained to them at the planning stage. Where there are not enough voluntary contributions to make the activity possible, and there is no way to make up the shortfall, then it must be cancelled. The essential point is that no pupil may be left out of an activity because his or her parents cannot, or will not, make a contribution of any kind. The school must first decide which class, or group of pupils, will benefit from the activity and then look for voluntary contributions, either for that activity or by general fund-raising.

ACTIVITIES NOT RUN BY THE SCHOOL OR LEA

When an organisation acting independently of a school or LEA arranges an activity to take place during school hours and parents want their children to join the activity, such organisations may charge parents. Parents must then ask the school to agree to their children being absent, just as they would if they wanted to take their children out of school for a family holiday. However, where an activity is organised by a third party, and is approved by the school, is educational or is supervised by someone authorised by the school, then it is this Department's view that it should be treated as if it were provided by the school, and no charge should be made to the parents, or pupils. Such an activity, if it takes place outside the school premises, is an 'approved educational activity' within the meaning of regulation 4A(a) of the Education (Pupil Registration) Regulations 1995 (as amended).

EDUCATION OUTSIDE SCHOOL HOURS

Parents can only be charged for activities that happen outside school hours when these activities are not a necessary part of the National Curriculum or that form part of the school's basic curriculum for religious education. In addition, no charge can be made for activities that are an essential part of the syllabus for an approved examination (see paragraph 13 below).

Charges may be made for other activities that happen outside school hours if parents agree to pay. The Education Act 1996 describes activities which can be charged for as 'optional extras'. It is up to the LEA or governing body providing the activities to decide whether to make a charge.

CHARGING POLICIES

The LEA or governing body may not charge for anything unless it has drawn up a statement of general policy on charging. The governing body's policy may be more or less generous than the LEA's, as long as it meets the requirements of the law. A policy statement will take account of each type of activity that can be charged for, and explain when charges will be made. If a charge is to be made for a particular type of activity - for example 'optional extras' - parents need to know how the charge will be worked out and who might qualify for help with the cost (or even get it free). Parents have a right to ask for this information, and a summary must be included in the prospectus published by the school.

If a charge is made for each pupil, this should not exceed the actual cost. If further funds need to be raised, for example, to help in hardship cases, this must be by voluntary contributions or general fund-raising.

The permitted charge may include an allowance for the costs of teachers from the school who supervise the activity, but only if those teachers have been given a separate contract to provide the optional extra. A contract need not be a formal document. It could be a simple letter to a teacher asking him or her to provide a service on a particular occasion.

EDUCATION PARTLY DURING SCHOOL HOURS

Sometimes an activity may happen partly during and partly outside school hours. If most of the time spent on a non-residential activity occurs during school hours, that activity counts as taking place entirely in school hours and no charge may be made. (Time spent on travel only counts as being during school hours if the travel takes place during school hours.) As an example, a long-distance trip might involve much travel before and after normal school hours, but if the time spent at the destination fell mainly within school hours, the trip would count as happening in school time and be free of charge. By contrast, a trip which involved leaving school an hour or so earlier than usual in the afternoon, but then went on until quite late in the evening, would be classified as taking place outside school time. Charges would then be allowed.

RESIDENTIAL ACTIVITIES

Special rules apply for residential activities. A trip counts as falling within school time if the number of school sessions missed by the pupils amounts to half or more of the number of half-days taken up by the activity. Each school day is normally divided into two sessions and each 24-hour period is divided into two half-days beginning at noon and at midnight. On this basis, a term-time trip from noon on Wednesday to 9 pm on Sunday would last for nine half-days, including five school sessions, and would count as taking place in school time. A trip from noon on Thursday to 9 pm on Sunday would count as seven half-days, including three school sessions, and would be classified for charging as taking place outside school time. If 50% or more of a half-day is spent on a residential trip, you should treat the whole of that half-day as spent on the trip.

For a residential activity taking place largely during school time, or which meets the requirements of the syllabus for a public examination, or is to do with the National Curriculum or religious education, no charge may be made either for the education or for the cost of travel. However, charges can be made for board and lodging in these circumstances, except for pupils whose parents are receiving: Income Support; Income-based Jobseeker's Allowance; Support under part VI of the Immigration and Asylum Act 1999; or Child Tax Credit (providing that they do not also receive Working Tax Credit and have an annual income, assessed by The Inland Revenue, that does not exceed £13,480). The headteacher should tell all parents of the right to claim free activities if they are receiving these benefits.

PUBLIC EXAMINATIONS

No charges may be made for entering pupils for public examinations that are set out in regulations. The governing body must enter a pupil for each examination in a public

examination syllabus that the school has prepared the pupil for. This does not need to apply if the governing body think there are educational reasons for not entering the pupil, or if the pupil's parents ask in writing that the pupil should not be entered. The LEA may not override the governing body's decision on whether to enter a particular pupil for an examination.

An examination entry fee may be charged to parents if:

- the examination is on the set list, but the pupil was not prepared for it at the school;
- the examination is not on the set list but the school arranges for the pupil to take it;
- a pupil fails without good reason to complete the requirements of any public examination where the governing body or LEA originally paid or agreed to pay the entry fee.

Charges may not be made for any cost associated with preparing a pupil for an examination. But charging is allowed for tuition and other costs if a pupil is prepared outside school hours for an examination that is not set out in regulations.

SCHOOL MINIBUSES

Only the school's pupils, staff or parents may travel at a charge in a school's minibus.

Schools may charge for transport in their minibuses only if they hold a permit issued under section 19 of the Transport Act 1985. The permit exempts the school from Public Service Vehicle (PSV) operator and driver licensing requirements. A permit is not required if no charge is made. Schools should apply to their LEA for a permit for each minibus.

Schools may not raise funds to make a profit by charging for travel in their minibuses.

Charges may recover some or all of the costs of running the vehicle, including loss of value. But the service may not make a profit, either directly through the fares charged or incidentally as part of a profit making activity, even if any profit would go into the school's other running costs or for charitable purposes. A charge is any payment made in cash or kind (for example, a club subscription) by or on behalf of a person which gives him or her a right to be carried.

Further information is available from LEAs or the regional Traffic Commissioners, addresses may be found in the phone book.

IN BRIEF

The Governing Body:

- may not charge for any activities which take place in school time, apart from instrumental tuition for individual pupils or pupils in groups of up to four;
- must draw up a charging policy, which does not have to be the same as the LEA's policy as long as it meets the requirements of the law;
- may invite parents and others to make voluntary contributions towards any part of the school's work;
- may charge for activities that are provided wholly or mainly outside school hours, as long as these activities are optional extras;
- may charge for board and lodging on residential courses.

THE LAW

N.B. As legislation is often amended and Regulations introduced, the references made in this guide may be to legislation that has been superseded. For an up to date list of legislation applying to schools, please refer to www.governor.net.co.uk

Education Act 1996: Sections 402, 450-458, 460

The Education (Prescribed Public Examinations) Regulations 1989

The Education (Residential Trips) (Prescribed Tax Credits) (England) Regulations 2003 SI 2003/ 381

The Education (Pupil Registration) Regulations 1995 SI 1995 No. 2089 as amended by The Education (Pupil Registration) Regulations 1997 SI 1997 No. 2624, amended by The Education (Pupil Registration) Regulations 1999 SI 2627 and by The Education (Pupil Registration) Regulations 2001 SI 2802.

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