

Response to your request

1. I enclose a copy of all of the information you requested in relation to correspondence and publications relating to the Scottish Government's links to the OECD Teaching and Learning International Survey (TALIS).
2. The answer to your questions are as follows:

Did SG apply to join TALIS 2024?

The Scottish Government was invited to participate in TALIS 2024 in October 2020. Based on consideration of the pros and cons of participation in the study, the decision was taken not to participate.

Will SG join TALIS 2030?

The Scottish Government will consider whether to participate in TALIS 2030, and no decision has been made or is required at this stage. It is likely that a decision will be required by 2027.

Document 1

From: [Redacted]
Education Analytical Services
14 May 2015

Cabinet Secretary for Education and Lifelong Learning

PARTICIPATION IN THE OECD TALIS OR PISA TEACHER SURVEYS

Purpose

1. To ask for your preference for gathering internationally comparable data on the teaching profession using the OECD Teaching and Learning International Survey (TALIS) survey or the teacher survey option in PISA 2018

Priority

2. **Urgent:** The OECD require a decision from participating countries in TALIS by 22 May

Background

3. Following meetings between you and Andreas Schleicher of the OECD and correspondence from [Redacted] at EIS, we have revisited the position regarding participation in TALIS or an alternative PISA survey option.

Issue

4. We have two options for gathering international comparative data on teachers data, both of secondary school teachers. TALIS 2018 is the more costly (c. £500,000), but more comprehensive covering more teachers and a wider range of teachers. An alternative may be to buy a teacher questionnaire option for PISA 2018 for less than £100,000.

5. For TALIS we must decide if are participating as a separate country with our own contractor and representation (as in PISA) or as part of the UK. Separate participation requires us to begin procurement by mid-June. Data will be available in June 2019 (TALIS) or December 2019 (PISA).

6. There are further TALIS options, including surveying primary school teachers. Finally we have the option of linking TALIS data together with PISA 2018.

7. Further information is set out in Annex A

Next steps

8. If you decide to proceed with TALIS, we will proceed to seek approval from DFM and Cabinet Secretary for Infrastructure as per procurement guidelines. We will also need to discuss the budgetary revisions needed to accommodate the costs of either TALIS or the PISA option **as we have not budgeted to undertake this work.**

Conclusion

9. You are asked to choose one of the following

1) Participate in the core TALIS survey at a cost of around £500,000 over five years and if so to:

- a) Tell us whether you prefer to participate as a separate country
- b) Tell us whether you wish to link the survey with PISA 2018 (at some extra cost tbc)
- c) Advise if you wish to consider further TALIS options (we will write to you again about costs)

2) Take up the option of a teacher questionnaire in PISA 2018 (subject to international demand) at a cost of around £100,000 over 5 years

3) Participate in neither option.

[Redacted]

Education Analytical Services

[Redacted]

14 May 2015

Copy List:	For Action	For Comments	For Information		
			Portfolio Interest	Constit Interest	General Awareness
Minister for Learning, Science and Scotland's Languages	«text»	«text»	X	«text»	«text»

DG Learning & Justice

Fiona Robertson

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

Director, Learning

Learning Strategy and Performance

Learning People and Infrastructure

Learning People and Infrastructure

Learning Analysis

Learning Strategy and Performance

Learning Strategy and Performance

Learning Analysis

Learning Analysis

ANNEX A

PARTICIPATION IN THE OECD TALIS AND PISA TEACHER SURVEYS

DESCRIPTION OF TALIS AND THE PISA TEACHER QUESTIONNAIRE OPTION

TALIS

1. The Teaching and Learning International Survey (TALIS) is a dedicated survey of teachers and schools and asks about their working conditions and the learning environment. It covers themes such as: initial teacher education and professional development; what sort of appraisal and feedback teachers get; the school climate; school leadership; pay and conditions and teachers' instructional beliefs, confidence and pedagogical practices.

2. Participation in TALIS involves a number of different elements - There is the core survey ("lower secondary") with survey options for upper secondary and primary. There are also additional research options which include an "initial teacher preparation study" and a video study of teaching methods. We understand that **our DfE colleagues are advising their ministers to participate in the Core (lower secondary), primary and a "video study" of maths teachers in secondary.**

3. The core survey (lower secondary) involves 200 schools with 20 teachers, plus 1 school leader – 4000 teachers.

4. Costs are obviously dependent on what elements we choose. Based on England's past experience we think that the **cost of the core survey plus the production of a national report could be up to £450,000.**

5. The further element of cost is **national contributions** that we would pay to the OECD for involvement. If we participated as a separate country we would pay a full country fee. As yet we do not know what these costs are but possibly around **£70,000**. The EU have indicated that they may cover some of this national contribution. If we participate separately, we need to start the commissioning process to appoint a contractor to run the survey by **mid June**

6. The alternative is to participate under the UK contract; we would have to pay for the fieldwork in Scotland, and we would make a smaller contribution to the UK international fee, but representation on the programme board would be undertaken by the DfE. At present, Wales and Northern Ireland look unlikely to participate.

PISA 2018 teacher questionnaire

7. One other alternative is that PISA has the possibility of a teacher questionnaire (we did not take that option for 2015). This involves sampling teachers within the schools who are selected to take part in PISA 2018.

8. It is smaller than TALIS (about 25 teachers – 10 science, 15 non-science, who teach 15 year-olds. So the sample is in the order of 2000-2500) and only those teaching 15 year olds.

9. It will be shorter (about 30 minutes) and covers appointment processes, engagement with parents, CPD, background, teachers' beliefs, teacher evaluation processes, perspective on leadership, support, teacher reward, approach to teaching the main PISA subject (reading in 2018), views on the curriculum and school climate. The main unit of analysis is at school level – i.e. not weighting of individual teachers' views, and no linking to the PISA results of pupils they have taught as individuals – but summarised at school level.

10. The costs are smaller, as it essentially an online addition to the existing PISA activity. We estimate this will be around £100,000, but it is dependent on procurement processes.

11. The timescale for decision is less tight - final options must be advised by the end of December 2015.

12. However, judging by 2015, there is likely to be a smaller number of countries involved for comparison ,(particularly given the proximity of TALIS) and indeed the survey option may not proceed if enough countries do not sign up.

Linking PISA and TALIS

13. The PISA option will allow a comparison between results and the types of responses in the teacher questionnaire. This will not be reported at school level, but there will be a national picture of what teacher responses are associated with high or low levels of performance.

14. Secondly, however, it will be possible for teachers in PISA schools to be sampled to sit the full TALIS survey. This will provide a greater amount of data, which could also be compared to other countries who have linked PISA and TALIS in this way. However, to date, only a small number of countries are participating. **England are not taking up this option.**

15. Linking teacher responses to performance may be insightful with respect to types of appraisal, CPD and strategies that are linked to good results. However, the teacher unions may be less comfortable with some aspects of this approach.

Adaptation for Scotland

16. Both surveys have a limited ability to adapt for Scotland-specific questions, as the rationale is to gather comparable international data, so this take up the bulk of the survey.

Results

17. Following previous patterns, TALIS 2018 will be available in June 2019, and the teacher results from PISA 2018 will be available from December 2019.

Learning Analysis
14 May 2015

Document 2

From: [Redacted] **On Behalf Of** Cabinet Secretary for Education and Lifelong Learning

Sent: 22 May 2015 17:15

To: [Redacted]; Cabinet Secretary for Education and Lifelong Learning; [Redacted]; [Redacted]

Cc: Minister for Learning, Science and Scotland's Languages; DG Learning & Justice; Robertson FMG (Fiona); [Redacted]; [Redacted]; [Redacted]; [Redacted]; [Redacted]; [Redacted]; [Redacted]

Subject: RE: Submission regarding participation in TALIS as discussed in Ontario.

[Redacted]

Apologies if my initial feedback was unclear and I appreciate you seeking clarity. I have now attached the original submission of 14 May for ease of reference and spoken with Cab Sec.

- Ms Constance would like to proceed with Option 2 ie. *take up the option of a teacher questionnaire in PISA 2018 (subject to international demand) at a cost of around £100,000 over 5 years*).
- The Cab Sec also would like officials to have a dialogue between SG officials and the EIS to develop / co-design a teacher survey which could also provide us with useful data.

I am also copying in [Redacted] for awareness.

Many thanks,

[Redacted]

[Redacted]

Private Secretary to the Cabinet Secretary for Education and Lifelong Learning
| Scottish Government |

[Redacted]

[Redacted]

From: [Redacted]

Sent: 22 May 2015 14:32

To: Cabinet Secretary for Education and Lifelong Learning; [Redacted]; [Redacted]

Cc: Minister for Learning, Science and Scotland's Languages; DG Learning & Justice; Robertson FMG (Fiona); [Redacted]; [Redacted]; [Redacted]; [Redacted]; [Redacted]; [Redacted]

Subject: RE: Submission regarding participation in TALIS as discussed in Ontario.

[Redacted]

Apologies, but just to be clear, pursuing the PISA-TALIS link would require us to participate in TALIS 2018. There can be no linkage unless we do both PISA **and** TALIS. The response does not explicitly agree to participating in TALIS – can you clarify the position on that specifically, please?

We can speak to the OECD and DfE colleagues about delaying a decision on our participation (or not) in TALIS 2018 until after June 4th, but they are not likely to be

receptive. EIS have already signalled to us that they wish us to participate in TALIS (there is an outstanding MACCS case to that effect).

Cheers,

[Redacted]
Head of Learning Analysis
Education Analytical Services
[Redacted]

From: [Redacted] **On Behalf Of** Cabinet Secretary for Education and Lifelong Learning
Sent: 22 May 2015 14:05
To: [Redacted]; [Redacted]; Cabinet Secretary for Education and Lifelong Learning
Cc: Minister for Learning, Science and Scotland's Languages; DG Learning & Justice; Robertson FMG (Fiona); [Redacted]; [Redacted]; [Redacted]; [Redacted]; [Redacted]; [Redacted]; [Redacted]
Subject: RE: Submission regarding participation in TALIS as discussed in Ontario.
Importance: High

[Redacted] / [Redacted]

Ms Constance has considered all the information below and would like the following progressed:

- PIZA – TALIS 2018 Link, which includes the teacher survey.
- Officials to have an open dialogue with the EIS on exactly what kind of teacher survey (jointly) will produce the results/evidence we require.

This office will be arranging a meeting with Larry Flanagan and the Cab Sec prior to the evening of 4 June. Officials should aim to have had preliminary discussions before that meeting.

Thanks,
[Redacted]

[Redacted]
Private Secretary to the Cabinet Secretary for Education and Lifelong Learning
| Scottish Government |

[Redacted]

From: [Redacted]
Sent: 21 May 2015 15:04
To: Cabinet Secretary for Education and Lifelong Learning; [Redacted]
Cc: Minister for Learning, Science and Scotland's Languages; DG Learning & Justice; Robertson FMG (Fiona); [Redacted]; [Redacted]; [Redacted]; [Redacted]; [Redacted]; [Redacted]; [Redacted]; [Redacted]
Subject: RE: Submission regarding participation in TALIS as discussed in Ontario.

[Redacted]

[Redacted] has asked me to reply as follows:

UK contract – At official level, both the UK and OECD are happy for us to choose either the combined UK or separate Scottish option. The only direct cost we would avoid by being in the UK contract is the “floor”, flat-rate country fee all participants incur – we reckon around £50,000 at the moment. We would instead pay a share of the UK’s fee. Some of the indirect costs of project management would be borne by DfE instead, but we would still need to actively engage.

Pros: -

- DfE would manage the procurement and contract management of the fieldwork provider.
- slight reduction in cost.

Cons: -

- Although we would have a say in the contractor (if perhaps not a veto), it will be less easy to appoint a contractor based primarily on Scottish needs;
- the DfE would have the seat on the Board of Participating Countries, although experience with PISA suggests they will be at pains to consult us.
- There may be more difficulties in amending the questionnaire as we would like to suit Scottish circumstances

PISA questionnaire

The alternative data is as we advised in the in the weekly note of 18 March (reproduced below). We would be able to deploy a small number of questions in the teacher component of SSLN, and there would be the core school questionnaire (of head teachers usually) in PISA, which allow a limited number of additional questions. Finally there will be information we can gather during one-off projects, such as the evaluation of Teaching Scotland’s Future (being procured currently).

There is usually no minimum response rate for PISA optional questionnaires, so we would likely have some data, although a good response (of the order of 60 per cent or more) would be desirable for robustness.

PISA – TALIS link

Both the PISA teacher questionnaire, and a formal link with TALIS, will allow comparison of performance data in schools with teacher responses and attitudes.

With PISA, the OECD would likely publish such data in their international reports anyway, in addition to our own analysis. With TALIS, the link may require us to conduct our own analysis. While it would be fuller data than PISA, we may be under greater scrutiny with regard to our analytical approach, what we choose to publish and how. This may complicate relationships with the teaching unions.

Overall, linking teacher data and performance may provide important insights into the factors which support improvement. The involvement of the OECD would help provide credibility to the work, but in any event the conclusions we choose to draw, or our application of the OECD’s conclusions, will be scrutinised significantly.

Text from weekly note of 18 March: (note the cost has increased to take account of reporting costs, and the international costs Scotland would incur linked to our GDP)

Scotland did not participate in TALIS 2013, and has decided not to do so in 2018. While TALIS would provide comparable data to other countries (albeit a smaller number than participate in PISA), there is limited flexibility to adapt the survey to cover Scottish initiatives, such as Teaching Scotland's Future. In addition data would only be available every five years. In the event we feel that the estimated £320,000 cost is not a good use of funds and we will instead use the flexibility to adapt existing surveys, such as SSLN and PISA, or commission one-off projects – such as an evaluation of TSF - as appropriate. DfE is holding off a decision to participate for England until after the UK General election.

Please let us know if you require further information

[Redacted]

[Redacted]
Principal Researcher, Learning Analysis
Education Analytical Services Division
2D (S) VQ
[Redacted]

From: [Redacted] **On Behalf Of** Cabinet Secretary for Education and Lifelong Learning

Sent: 21 May 2015 13:44

To: [Redacted]; Cabinet Secretary for Education and Lifelong Learning

Cc: Minister for Learning, Science and Scotland's Languages; DG Learning & Justice; Robertson FMG (Fiona); [Redacted]; [Redacted]; [Redacted]; [Redacted]; [Redacted]; [Redacted]; [Redacted]; [Redacted]

[Redacted]

Subject: RE: Submission regarding participation in TALIS as discussed in Ontario.

Importance: High

[Redacted]

The Cab Sec has a few points which we would appreciate a quick response this afternoon to then make a further judgement on the paper:

- Para 6 mentions the option of participating under the UK contract – what would this cost ? Would the UK government agree to this and what are the pros/cons of doing so.
- Para 7 – PISA 2018 Teacher Questionnaire – what would happen if not enough teachers engaged ? Do we have something else we could utilise ?
- Paras 13/14 – what are the pros/cons of this option

A response by 5pm today would ensure Cab Sec could comment by tomorrow's deadline.

Thanks,

[Redacted]

[Redacted]

Private Secretary to the Cabinet Secretary for Education and Lifelong Learning
| Scottish Government |

[Redacted]

From: [Redacted]

Sent: 18 May 2015 15:41

To: Cabinet Secretary for Education and Lifelong Learning

Cc: Minister for Learning, Science and Scotland's Languages; DG Learning & Justice; Robertson FMG (Fiona); [Redacted]; [Redacted]; [Redacted]; [Redacted]; [Redacted]; [Redacted]; [Redacted]

Subject: RE: Submission regarding participation in TALIS as discussed in Ontario.

[Redacted]

We discussed and you'll provide a further note with the submission.

Thanks

[Redacted]

From: [Redacted] **On Behalf Of** Cabinet Secretary for Education and Lifelong Learning

Sent: 18 May 2015 14:59

To: MacDougall A (Audrey); Cabinet Secretary for Education and Lifelong Learning

Cc: Minister for Learning, Science and Scotland's Languages; DG Learning & Justice; Robertson FMG (Fiona); [Redacted]; [Redacted]; [Redacted]; [Redacted]; [Redacted]; [Redacted]; [Redacted]; [Redacted]

Subject: RE: Submission regarding participation in TALIS as discussed in Ontario.

Importance: High

[Redacted]

Ms Constance has noted your submission of 14 May but would welcome details and specifics on the actual costings before considering further.

Grateful for advice by 5pm today to make the Box this evening.

Thanks,

[Redacted]

[Redacted]

Private Secretary to the Cabinet Secretary for Education and Lifelong Learning
| Scottish Government |

From: [Redacted]

Sent: 15 May 2015 15:23

To: Cabinet Secretary for Education and Lifelong Learning; Minister for Learning, Science and Scotland's Languages

Cc: DG Learning & Justice; Robertson FMG (Fiona); [Redacted]; [Redacted]; [Redacted]; [Redacted]; [Redacted]; [Redacted]; [Redacted]; [Redacted]

Subject: RE: Submission regarding participation in TALIS as discussed in Ontario.

Attachment now attached. Apologies, I'm trying to draft too many emails at once.

[Redacted]

From: [Redacted]

Sent: 15 May 2015 15:20

To: Cabinet Secretary for Education and Lifelong Learning; Minister for Learning, Science and Scotland's Languages

Cc: DG Learning & Justice; Robertson FMG (Fiona); [Redacted]; [Redacted]; [Redacted]; [Redacted]; [Redacted]; [Redacted]; [Redacted]; [Redacted]

Subject: RE: Submission regarding participation in TALIS as discussed in Ontario.

[Redacted]

I attach a submission regarding Scotland's potential participation on TALIS as I understand Cabinet Secretary was very interested following her trip to Ontario. Apologies for the rush but the OECD have now told us that they need a decision on our participation by 22 May.

Happy to discuss or provide further information.

[Redacted]

Document 3

Great – thanks [Redacted].

I have confirmed your position with the OECD.

Thanks,
[Redacted]

[Redacted]
International Statistics Team
Department for Education

From: [Redacted]
Sent: 08 June 2015 10:48
To: [Redacted]
Cc: [Redacted] [Redacted]
Subject: RE: TALIS information

[Redacted]

Many thanks. Just to say that our Cabinet Secretary has decided not to go forward with TALIS in Scotland, but we will be pursuing the teacher questionnaire for PISA 2018 (copied to [Redacted]for info).

[Redacted]

From: [Redacted]
Sent: 05 June 2015 09:32
To: [Redacted]
Subject: RE: TALIS information

Hi [Redacted],

I am sorry I haven't been able to return your call as I have been in meetings the last 2 days and am actually on leave today. To provide a bit more detail on top of Lorna's response. We are being chased by OECD as they would like to have firm decisions for their costings for the international contractors. We have our firm recommendation to Ministers that we suggest participating in TALIS at secondary, primary and in the video study (if Ministers want to spend the money on the additional video study / scoping bit of it).

However, as[Redacted]says we have not yet been able to engage them in the question/decision. We are looking to send up our submission next Thursday for a response the following week at which point I will get back to OECD.

Thanks,
[Redacted]

From: [Redacted]
Sent: 04 June 2015 16:18
To: [Redacted] [Redacted]
Subject: RE: TALIS information

Thanks, [Redacted]. Not yet but we're intending to put a note up in the next couple of weeks.

[Redacted]

From: [Redacted]
Sent: 04 June 2015 14:59
To: [Redacted]; [Redacted]
Subject: RE: TALIS information

Hi [Redacted], [Redacted]

Sorry for the continuing delay in getting back to you. It should be resolved this week. Have you got the go-ahead from your Ministers?

[Redacted]

From: [Redacted]
Sent: 29 May 2015 01:44
To: [Redacted]
Subject: RE: TALIS information

Thanks [Redacted]. Any further news? We are being chased by the OECD!

[Redacted]

From: [Redacted]
Sent: 21 May 2015 16:36
To: [Redacted]
Subject: RE: TALIS information

Hi [Redacted]

Just to let you know that a decision on Scotland participation in TALIS is imminent and on what terms, but our Cabinet Secretary is unlikely to come back in time for tomorrow (it and Monday being holidays). So we're not likely to let you know before the 22nd.

But hopefully I'll be able to let you know what is decided on Tuesday first thing.

[Redacted]

From: [Redacted]
Sent: 11 May 2015 18:06
To: [Redacted]
Subject: RE: TALIS information

Hi [Redacted],

Attached is the full contract for TALIS 2013. Again, grateful if you can keep this confidentially.

I will circulate a more detailed TALIS BPC note tomorrow. However, I do have some updates that you might find helpful now:

1. On funding –
 - a. as TALIS 2018 will move to a part II programme and they have a better idea of participation, the international contributions are slightly different (see attached paper on funding and mandate). England and Scotland are currently included as one entity, however I have mentioned to Karine that we might want to join as separate entities. In which case, we would need to decide which option we go for. There is some text around participation of sub-national entities in the draft mandate, which you might want to check and comment on too? Happy to discuss in more detail, if helpful. It would be good to know which you think you would be opting for, as this will impact England's contribution too.
 - b. On top of this. The European Commission confirmed that they will pay 80% of member states' international contributions for this financial year through a lump sum payment to the OECD so that we only pay 20% of the int. contributions (they also confirmed their intention to do so in future, but are still discussing with OECD how they might do this).
2. On country participation – the current status is outlined in the attached note (roundtable...)
3. On deadlines for confirmation – the next steps are outlined in the revised costings presentation. They are:
 - a. **22 May 2015**: Deadline to confirm intention to join TALIS and to confirm preference for participant/associate status for partners. I have let Karine know that this might be tight for us in England given we will need to get the agreement of new Ministers, but it would be good if you are able to let me know your thinking in Scotland so I can at least provide an update and help the OECD work out their final costings.
 - b. **29 May 2015**: Secretariat to send out final costings for 2015 VCs based on intentions and partner status and model letters for 2015 VCs and commitments for 2016-2019
 - c. **30 June 2015**: Deadline to send offer letters

Let me know if you require any further information.

Thanks,
[Redacted]

[Redacted]
International Statistics Team

Department for Education

From: [Redacted]
Sent: 11 May 2015 15:27
To: [Redacted]
Subject: RE: TALIS information

Hi [Redacted]thank you.

There's a contract variation with RM for the reporting – do you happen to have a spec for the main 2013 contract we can look at?

[Redacted]

From: [Redacted]
Sent: 07 May 2015 11:10
To: [Redacted]
Subject: TALIS information

Hi [Redacted],

See attached a whole host of papers on TALIS for you to consider! I've also attached the TALIS agenda that I am midway through. Please let me know if you would like to arrange a catch up next week on the discussions. I also have access to the TALIS sharepoint site too, so happy to send you any background documents you think you might find helpful.

- On the core TALIS 2018 study: I have attached the OECD's latest planning document as to what they propose TALIS 2018 focuses on. There was quite a lot of discussion on this paper at today's meeting so I wouldn't expect the final themes to be those outlined in this paper, but it will provide you a good starting point. I have also attached their call for tender doc so you can see what they are asking of their international contractor. Interested countries have until 22nd May to comment on their proposal to appoint IEA to run the study again. I can send you their comments on the IEA proposal, if that would be interesting?
- On the options: I have attached the TALIS 2018 brochure and the overviews of the TALIS video and Initial Teacher Preparation (ITP) project. I have more information on each of these that I can send, if helpful. We will recommend to our new Ministers that they should consider participation in the video study. It will be quite expensive though, so we're not sure whether it will be agreed.
- On the costings: I have attached the most recent paper on the OECD's calculations of cost. We are included as the UK (however there is a section that relates to the options for sub-national entities participating separately). The preferred funding model is model G. At present, I think this would result in a joint UK contribution of: £333,067 over five years.
- On TALIS 2013: I have attached the final variation we made to our TALIS 2013 contract so you know how we delivered this project in England (key milestones and cost). I am sharing this contract variation in confidence to inform your

planning. I would be grateful if you could keep this information to yourself and not share more widely, as it is commercially sensitive.

Thanks,
[Redacted]

[Redacted]

.....

Document 4: Briefing document for EIS meeting – 3 June 2015

EIS meeting: PISA Teacher Questionnaire and TALIS compared

Background

1. The two options involve a) an additional questionnaire administered in schools participating in PISA 2018, or b) a separate survey of teachers across Scotland (TALIS). Both are run by the OECD and cover similar subject areas.

	PISA Teacher questionnaire	TALIS
Timing	2018, but three-yearly	2018, five-yearly
Sample size	c. 2,800 teachers in 115 schools (10 English – “Reading” – 15 non-reading in each school)	4000 teachers in 200 schools
Target group	Teachers of 15 year-olds	“Core” – lower secondary. Options for Primary and “upper secondary” (at a further cost)
Subject area	Appointment processes, engagement with parents, CPD, background, teachers’ beliefs, teacher evaluation processes, perspective on leadership, support, teacher reward, approach to teaching the main PISA subject (Reading in 2018), views on the curriculum and school climate	initial teacher education and professional development; what sort of appraisal and feedback teachers get; the school climate; school leadership; pay and conditions and teachers’ instructional beliefs, confidence and pedagogical practices; teacher wellbeing and job satisfaction
Length	30 minutes	45 minutes
Participating countries	19 countries are participating in the teacher questionnaire in 2015. Numbers may be reduced in 2018 because of the concurrence with TALIS. Not including England.	40 likely participating countries, including England
Cost	c. £100,000 over 5 years	c. £500,000 over 5 years
Linkages	Direct link with PISA results, although not individual teachers with their students	Can be linked with the PISA results, although this may involve extra costs to ensure sampling in PISA schools

Costs

2. The costs between the two options vary markedly, largely because most of the infrastructure of carrying out the survey for the PISA option will already be established in the contract for the PISA 2018 survey. There will also be less data to process.

Deadlines

3. The timescale for agreeing to participate in TALIS is much tighter:

- TALIS – The original deadline for countries signalling participation has passed and OECD are now pressing for the UK's definitive answer on participation
- PISA – A final decision on participation in the additional questionnaire must be made by then end of this year, and the option is being built into the current tender exercise for the 2018 contractor.

International summit hosts and participation in TALIS

4. The International Summit on the Teaching Profession was held in the New York in 2011 and 2012, Amsterdam in 2013, Wellington in 2014 and Banff, Alberta in 2015. The Netherlands has participated in all three TALIS cycles since 2008, Alberta (the sole Canadian province in TALIS) and US since 2013, and New Zealand will participate for the first time in 2018.

Potential EIS issues

5. EIS will wish for a comparison with a greater number of countries, and perhaps the prestige of participation in TALIS confirmed before Scotland hosts a future summit.

6. However Larry Flanagan has made clear his concerns about PISA in terms of the creation of international league tables and homogenisation of the education systems around the world. In 2015, for the first time, the EIS declined to endorse participation of Scotland in PISA. However, this was nuanced to the degree that they did not enter into active public opposition to the testing, and their grounds were based mainly on teacher workload, rather than dislike of international assessments.

7. Apart from not having the same as ability as TALIS to compare with more countries, and a smaller sample for analysis, a PISA teacher questionnaire might require the EIS to endorse participation in PISA to schools again. In addition they may be uncomfortable with the links between teacher data and performance (albeit this can only be analysed by overall school performance, and will not be reported down to school level). An endorsement question may also arise if TALIS and PISA are linked directly.

Learning Analysis June 2015

Document 5

From: [Redacted]
Education Analysis

13 July 2018

Deputy First Minister

PARTICIPATION IN THE OECD'S TEACHING AND LEARNING INTERNATIONAL SURVEY (TALIS)

Purpose

10. You asked for advice on the OECDs teacher survey, TALIS, following a meeting with the EIS where they requested that Scotland participate in the survey.

Priority

11. Routine. This submission is for information only.

Background

12. The Teaching and Learning International Survey (TALIS) is a dedicated survey of teachers and schools and asks about their working conditions and the learning environment. TALIS is a periodic survey. It is taking place in 2018 and had two previous cycles in 2008 and 2013. Starting in 2018, it will be carried out every six years. Scotland has never participated in TALIS.

13. EIS have requested that Scotland take part in TALIS on a number of occasions.

14. In 2015 Ministers took the decision not to participate in TALIS 2018. There is limited flexibility to adapt the survey to cover Scottish initiatives and data is available only every 6 years (compared to every 3 years through PISA). It was felt that the estimated cost was not a good use of funds. Further information on TALIS is at annex A.

15. Instead, Ministers agreed that we would take part in the teacher survey for PISA (Programme for International Student Assessment) 2018. We did not take up this option in PISA 2015. The PISA teacher questionnaire asks teachers within participating schools about their background, qualification, teaching practices and networks, and various school policies. It was first offered as an international option in PISA 2015 with 19 countries and economies taking part.

16. There are both similarities and differences between the teacher questionnaires in TALIS and PISA. Some constructs are common to both questionnaires, such as teachers' background or job satisfaction, but other topics are unique to only one of the surveys, such as teachers' belief on teaching in TALIS and questions on the content of schools' formal curriculum in PISA. Further information on TALIS and the PISA teacher survey is at Annex A and comparisons between the two surveys are in Annex B. .

17. The next TALIS is due to take place in 2024. It is likely that a decision on whether or not Scotland should participate will require to be taken by 2020. There is currently no budget to put towards taking part in TALIS from existing resources.

Conclusion

18. The next opportunity for Scotland to take part in TALIS will be in 2024. We will need to make a decision on this in the next two years. Scotland is taking part in the teacher survey in PISA 2018, which will report in December 2019, and would have the option of taking part again in the PISA 2021 survey. You are invited to note the information in this minute.

[Redacted]

Education Analysis

28 June 2018

Copy List:	For Action	For Comments	For Information		
			Portfolio Interest	Constit Interest	General Awareness
Deputy First Minister					X

DG Learning, Justice and Communities
 Fiona Robertson
 Graeme Logan
 Andy Bruce
 Clare Hicks
 Mick Wilson
 [Redacted]
 [Redacted]
 [Redacted]

ANNEX A

PARTICIPATION IN THE OECD TALIS AND PISA TEACHER SURVEYS

DESCRIPTION OF TALIS AND THE PISA TEACHER QUESTIONNAIRE

TALIS

18. The Teaching and Learning International Survey (TALIS) is a dedicated survey of teachers and schools and asks about their working conditions and the learning environment. It covers themes such as: professional development; teaching beliefs and practices; the assessment of work and the feedback and recognition received; and various other school leadership, management and workplace issues. TALIS relies on teachers' and school leaders' expertise as professionals to describe their work situation as accurately as possible, as well as their experiences in and feelings about their schools and working conditions. It is not an assessment, but a self-reported survey.

19. Participation in TALIS involves a number of different elements - There is the core survey ("lower secondary") with survey options for upper secondary and primary. There are also additional research options which include an "initial teacher preparation study" and a video study of teaching methods.

20. TALIS sets a minimum sample size of 4 000 teachers and 200 school principals per country and asks participants to complete a detailed questionnaire. There are minimum response rates of teachers and principals to attain in order to ensure the collection of high-quality data.

21. A total of 45 countries and economies are taking part in TALIS 2018, including England, although not Scotland, Wales or Northern Ireland. England is surveying primary and lower secondary school teachers and their headteachers. The main study took place in February and April 2018, with initial reports expected in June 2019.

22. The costs of TALIS are dependent on what elements a country chooses to take part in. In 2015, we estimated the cost of the core survey for TALIS 2018 plus the production of a national report could be up to £450,000 (based on England's past experience). The further element of cost is national contributions that we would pay to the OECD for involvement. In 2015, we estimated that the cost of participating as a separate country would be around £70,000.

23. Based on the TALIS planning cycle for 2018, there is a three year lead in time for the questionnaire. This is likely to entail a decision on whether to take part in 2020; planning, tendering and contracting in 2021; questionnaire development and pilot in 2022; a field trial in 2023; the main study in 2024; and the initial report published the following year.

PISA 2018 teacher questionnaire

24. We are taking part in the PISA 2018 teacher questionnaire. We have not previously taken up this option. This involves sampling teachers within the schools who are selected to take part in PISA 2018.

25. It is smaller than TALIS (about 25 teachers – 10 teaching reading, 15 teaching non-reading specific subjects, who teach 15 year-olds. So the sample is in the order of 2000-2500 nationally) and only those teaching 15 year olds. The PISA teacher questionnaire asks teachers within participating schools about their background, qualification, teaching practices and networks, and various school policies. It was first offered as an international option in PISA 2015 with 19 countries and economies taking part.

26. It will be shorter (about 30 minutes) and covers appointment processes, engagement with parents, CPD, background, teachers' beliefs, teacher evaluation processes, perspective on leadership, support, teacher reward, approach to teaching the main PISA subject (reading in 2018), views on the curriculum and school climate. The main unit of analysis is at school level – i.e. not weighting of individual teachers' views, and no linking to the PISA results of pupils they have taught as individuals – but summarised at school level.

27. The Scottish Government made a national contribution of EUR 23,456 to PISA for participation in the Teacher Questionnaire Option in addition to other PISA costs and the costs involved in collecting the data.

Adaptation for Scotland

28. Both surveys have a limited ability to adapt for Scotland-specific questions, as the rationale is to gather comparable international data, so this takes up the bulk of the survey. It is possible

Results

29. The teacher results from PISA 2018 will be available from December 2019.

ANNEX B: COMPARISONS BETWEEN PISA AND TALIS TEACHER QUESTIONNAIRES

Questionnaire	Topics that are unique to the survey	Sampling	Timing and trends	Number of participating countries
PISA teacher questionnaire	<ul style="list-style-type: none"> - Teacher's professional development activities: requirement to participate - Existence and content of school's formal curriculum, information of parents about school curriculum -Students' team collaboration activities: appreciations used - Approaches to assign final semester grade 	Focus on core subject in PISA. In 2018, up to 10 teachers of reading and 15 non-reading subject teachers for each sampled school (between 2,000 and 2,500)	Every three years: 2018; 2021	19 countries and economies in PISA 2015
TALIS teacher questionnaire	<ul style="list-style-type: none"> - Teacher initial education: type of institution, duration, concurrent vs consecutive program, entrance requirements, degree of subjects specialization - Teacher's professional development activities: duration, funding and support received, impact on teaching - Teacher's professional development: participation in induction and monitoring activities 	No focus on a particular domain of assessment; 20 teachers per school (min. sample of 200 schools and 4,000 teachers). Possible extensions to primary and upper secondary cycles. National representative sample of teachers.	Every six years after this cycle: 2018, 2024	34 countries and economies in TALIS 2013

<ul style="list-style-type: none"> - Teacher's professional development: area and degree of needs, nature and importance of barriers - Time spent by the teacher on various tasks during class time and a school week -Teacher feedback: from whom, about what, areas emphasized, impacts - Teacher beliefs on teaching 				
TALIS-PISA link	None	20 teachers per PISA sampled school	Every six years	8 countries and economies in PISA 2012 – TALIS 2013

[Redacted]
Learning Analysis
13 July 2018

Document 6

Deputy First Minister and Cabinet Secretary for
Education and Skills
John Swinney MSP



Scottish Go
gov.scot

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

Address

July 2018

Dear

OECD Teaching and Learning International Survey (TALIS)

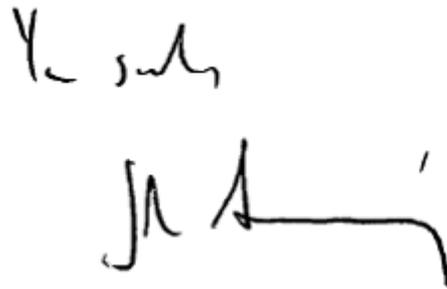
At our meeting on XX/06/18, you requested that the Scottish Government participate in the OECD Teaching and Learning International Survey (TALIS). In 2015, Ministers took the decision not to participate in TALIS 2018 and opted instead to participate in the PISA 2018 Teacher Survey.

The PISA Teacher Survey asks teachers within participating schools about their background, qualification, experience, professional development, wellbeing, satisfaction with the job and profession, teaching practices and networks, and various school policies. Over 2,000 teachers from across Scotland will take part in the survey in October and November 2018. The results from the survey will be published in December 2019 alongside comparable results from a number of other countries. This will be the second PISA Teacher Survey – and the first that Scotland has taken part in – and we expect that the data and analysis will offer invaluable insights into the experience and views of teachers across Scotland, and enable comparisons with UK and international counterparts.

While the TALIS survey offers some valuable information on the teaching experience, it was considered that the PISA teacher survey was the most beneficial option. TALIS takes place on a six year cycle – compared to the three year PISA cycle – which means that the next TALIS survey will take place in 2024 with results published in 2025. In that period, the PISA teacher survey will have reported twice.

A decision on whether to take part in TALIS 2024 will be required in 2020, at which point we will consider the insight provided by the PISA Teacher Survey and the relative merits of the TALIS survey.

If you have any other queries about the PISA Teacher Survey, then please contact [Redacted], survey manager for the Scottish Government, on [Redacted] or [Redacted]

A handwritten signature in black ink, appearing to read 'John Swinney', with a stylized flourish at the end.

JOHN SWINNEY

Document 7

Mr. Andreas Schleicher
Director Directorate for Education and Skills

Mr John Swinney MSP
Deputy First Minister of Scotland and Cabinet Secretary for Education & Skills
The Scottish Government St. Andrew's House Regent Road
Edinburgh
EH1 3DG
United Kingdom

EDU/D/2020.084 Paris, 13 October 2020

Dear John, I am writing to follow up on our discussion last year in the margins of the International Summit on the Teaching Profession, during which you indicated a strong interest in participation in the OECD Teaching and Learning International Survey (TALIS) for the next cycle to be administered in 2024.

TALIS collects the views of lower secondary education teachers and school leaders on issues related to their work, and serves as a global barometer of the teaching profession, focussed on teachers' and school principals' working conditions, learning environments and beliefs and practices in an international comparative perspective. Being able to compare the findings from our TALIS survey across countries has helped teachers, school leaders and policy makers better understand the challenges facing the profession and learn from the best performing countries. You can find more about TALIS in our online flyer, including quotes from teachers on the value they get from TALIS, and from our FAQ, which provides more details on the modalities for countries' participation.

My colleagues have advanced with the planning of this new cycle, which will encompass not only the core survey of lower secondary teachers (ISCED level 2) but also, as in the last two cycles, the possibility, on an optional basis, to survey additional populations of teachers and school leaders, as well as administer innovative modules. These options focus on:

- teaching professionals in primary (ISCED level 1) education
- teaching professionals in upper secondary (ISCED level 3) education
- staff and centre leaders in early childhood education and care centres (ISCED 02 and children under 3, known as the Starting Strong survey)
- an innovative optional module examining, for the first time, teachers' general pedagogical knowledge (the Teacher Knowledge Survey assessment module)
- an innovative longitudinal study of novice teachers exploring the experience of new teachers during the first years of their career (the Novice Teachers module).

My colleagues have estimated the international costs for Scotland at 36K € per year for 6 years. Scotland would also need to bear the cost of national implementation. Of course, if other countries of the UK will also join then these costs would be shared among them. Should you need to obtain more information on modalities, costs for some of the optional modules and the process for joining, we would be happy to

schedule a call to pursue the discussion on Scotland's participation in TALIS 2024.
Looking forward to hearing from you.

Yours sincerely, Andreas Schleicher

Document 8

From: [Redacted]
Learning Analysis
16 November 2020

Deputy First Minister and Cabinet Secretary for Education and Skills

PARTICIPATION IN THE OECD'S TEACHING AND LEARNING INTERNATIONAL SURVEY (TALIS) 2024

Purpose

19. Andreas Schleicher, OECD Director of Education and Skills, wrote to you on 13 October (Case Reference: 202000105721) with a view to Scotland participating in TALIS 2024. This note provides background information on TALIS and views/costs involved in participation.

Priority

20. Routine.

Background

21. The Teaching and Learning International Survey (TALIS) is a dedicated survey of teachers and schools that asks about their working conditions and the learning environment. It covers themes such as: professional development; teaching beliefs and practices; the assessment of work and the feedback and recognition received; and various other school leadership, management and workplace issues. It is not an assessment, but a self-reported survey.

22. TALIS is a periodic survey. It last took place in 2018 and had two previous cycles in 2008 and 2013. From 2018, it will be carried out every six years, with the next planned for 2024. The first report and data from the 2018 TALIS survey was published on 19 June 2019.

23. Scotland has never participated in TALIS, having taken the decision not to participate in 2015 and instead agreeing to take part in the teacher survey for PISA 2018.

24. Following the 2019 International Summit of the Teaching Profession, Andreas Schleicher (the OECD Director for Education and Skills) sent a letter to you encouraging Scotland to participate in the TALIS Programme, outlining the process of doing so and the timeline. Our response declined that invitation. His most recent letter follows up on that original correspondence.

25. England was the only country in the UK that participated in TALIS 2018. However, DfE announced at the end of September 2020 that England would not participate in TALIS 2024 in order to reduce 'considerable workload burden'. Unions in England opposed the announcement, arguing that the survey provides vital data. If Scotland were to participate, we would be the only country in the UK to do so, which would limit comparative analysis.

Resources required for TALIS

26. The resources and budget required to undertake TALIS in Scotland would depend on the option for participation that was selected. Participating jointly with England would have lowered costs, but their withdrawal removes any such possibility.

27. TALIS would involve payments to the OECD for participation and to contractors to undertake the fieldwork in Scotland. The core TALIS survey cost is EUR 130k to undertake the survey with lower secondary school teachers (and an additional optional EUR 30k for primary school teachers and EUR 31.5k for upper secondary). The cost would be spread out over the four year TALIS cycle.

28. A contractor would be required to undertake the fieldwork in Scotland. For TALIS 2018, the Department for Education spent £473k on a contractor in England, while in 2015 we estimated a cost of £450k to undertake fieldwork in Scotland. In addition, SG staff resources would be required to commission, project manage and report on the TALIS findings. TALIS sets a high minimum sample size of 4,000 teachers and 200 school principals per country and asks participants to complete a detailed questionnaire. There are minimum response rates of teachers and principals to attain in order to ensure the collection of high-quality data.

11. It would therefore be expected that the overall payments for TALIS 2024, assuming Scotland has separate adjudication and reporting to England, would be in the region of £550k, to be paid between 2020 and 2024.

Stakeholder views in Scotland

29. EIS have directly requested that Scotland take part in TALIS on a number of occasions, and the OECD letter states that the three main Scottish teacher unions voiced interest in TALIS participation at a recent OECD Trade Unions Advisory Committee working group on education.

30. Policy colleagues have undertaken informal conversations with stakeholders around participation in TALIS. Both EIS and SLS are supportive, which is unsurprising given the focus the survey provides on workload related matters; and the Education Scotland Professional Learning & Leadership team would have an interest in terms of being able to make international comparisons.

31. Two Heads of School of Education have suggested that some of the TALIS questions would be challenging to answer and that participating would very likely exacerbate some of the criticisms being faced on workload, as well as those about ITE and CLPL in terms of confidence and preparedness of teachers. They have suggested the focus should be on our own data and research and having confidence in our own systems, rather than trying to compare ourselves with others.

32. GTCS have taken a broadly similar position, highlighting that their annual evaluation report on Professional Learning and Professional Update gives us a lot of what we would gain from TALIS. They also stated that they carry out a 5-year review of professional standards, and are now better resourced to engage more with

practitioners through Professional Update so are not sure what more information TALIS would give us.

Conclusion

33. The letter from Andreas Schleicher offers to set up a call to provide further information on TALIS 2024. Officials from Learning Analysis have arranged a meeting with OECD officials on 18/11/2020 to discuss the survey.

34. The cost of participation – based around the option of separate adjudication and reporting for Scotland – is likely to be in the region of £550k, which would be paid in stages between 2020 and 2024. This is not currently identified within Learning Directorate budgets.

35. Our recommendation at this time is that Scotland should not seek to join the TALIS programme.

36. You are invited to note the information in this minute, and approve the attached letter to Andreas Schleicher at the OECD, which explains the current position. Please note that the MACCS case deadline is today (16/11/2020). The delay in putting together the response resulted from the requirement to gather information to put together this note.

[Redacted]

Learning Analysis

[Redacted]

16 November

Copy List:	For Action	For Comments	For Information		
			Portfolio Interest	Constit Interest	General Awareness
Minister for Children and Young People Minister for Further Education, Higher Education and Science					X X

DG Learning, Justice and Communities
 Graeme Logan
 Sam Anson
 Andy Drought
 Mick Wilson
 [Redacted]
 [Redacted]
 [Redacted]
 [Redacted]
 [Redacted]

ANNEX A: RESPONSE TO OECD

Dear Andreas,

Thank you for your letter regarding participation in the OECD Teaching and Learning International Survey (TALIS).

I appreciate you sending information on the planning of the new cycle of TALIS and how Scotland can be involved, as well as an offer of setting up a call to discuss further.

We have considered the information provided on TALIS 2024 and have taken the decision that it is not the right time for Scotland to participate at this stage. However, please continue to consider Scotland for future surveys, and my officials will keep in touch with your own team to keep up to date with developments in the survey. I hope that TALIS 2024 can be carried out successfully.

Your sincerely,

Document 9

Hi [Redacted],

DFM has commented that he thinks this is a difficult one given the interest of the professional associations. DFM would appreciate some further advice on this.

Thanks.

[Redacted],

[Redacted], |Deputy Private Secretary to John Swinney MSP | Deputy First Minister of Scotland and Cabinet Secretary for Education & Skills | Scottish Government | St Andrew's House | Edinburgh | EH1 3DG |Tel: [Redacted], | E: DFMCSE@gov.scot

From: [Redacted],

Sent: 17 November 2020 18:14

To: Deputy First Minister and Cabinet Secretary for Education and Skills
<DFMCSE@gov.scot>

Cc: Director of Learning <DirectorofLearning@gov.scot>; DG Education, Communities & Justice <DGECJ@gov.scot>; [Redacted], Anson S (Sam) <Sam.Anson@gov.scot>; Drought A (Andrew) <Andrew.Drought@gov.scot>; Wilson M (Mick) <Mick.Wilson@gov.scot>; [Redacted],; [Redacted],; [Redacted],; [Redacted],; [Redacted],

Subject: DFM submission - Participating in the OECDs TALIS Survey 2024

PARTICIPATION IN THE OECD'S TEACHING AND LEARNING INTERNATIONAL SURVEY (TALIS) 2024

Deputy First Minister,

Please find attached a Ministerial Submission on the OECDs offer for Scotland to participate in the TALIS Survey 2024. Please note the MACCS case deadline for responding to the original letter is today (16/11/2020). Apologies for the delay in responding, this resulted from the requirement to gather information to put together this note. The proposed response to the OECD is included in Annex A.

Happy to discuss further if needed.

Kind regards,

[Redacted],

Document 10

From: [Redacted],
Sent: 30 November 2020 17:49
To: [Redacted], Wilson M (Mick) <Mick.Wilson@gov.scot>
Subject: RE: TALIS 2024 survey

Thanks, [Redacted].

Are you content for me to send the submission once I had made these changes?

[Redacted]

From: [Redacted],
Sent: 30 November 2020 17:36
To: [Redacted], Wilson M (Mick) <Mick.Wilson@gov.scot>
Subject: RE: TALIS 2024 survey

Thanks [Redacted],. I think being explicit that TALIS participation includes both field trial as well as main survey, would be good

Also that it would likely mean that a number of schools would be required to participate in both TALIS and PISA (either FTs and MSs) for the next 4 years, and that this would increase burden and affect response rates (which are strict for successful participation)

[Redacted],

From: [Redacted],
Sent: 30 November 2020 14:02
To: Wilson M (Mick) <Mick.Wilson@gov.scot>; [Redacted],
Subject: RE: TALIS 2024 survey

Hi both,

Thanks for your comments on the TALIS 2024 submission.

I had conversations with DfE and OECD today regarding TALIS, which provided further insight.

DfE decided not to undertake TALIS 2024 as feel they gather enough evidence through their annual national teacher workload surveys. They raised the issue of UK membership of the TALIS Governing Board, as they will remain a member for the next year, so we would need to speak to DfE about the UK implications if we went ahead.

OECD colleagues are keen for us to take part. The official deadline has passed, but there is still opportunity to join. We ran through the TALIS procedures (very similar to PISA), which includes a min. sample of 200 schools/20 teachers per school (almost two-thirds of secondary schools in Scotland) which is big ask. There is also a potential clash between the TALIS Field Trial and PISA 2022 assessments in October 2022, although they are looking at moving to Feb/March 2023 instead.

I have updated the submission (see below), although I haven't changed very much based on the above. I have added one paragraph on existing sources of data in the 'con' section, so grateful if you could have a look at that.

Click on the link to open 'Learning Research - TALIS - Submission 24 Nov 2020' - <https://erdm.scotland.gov.uk:8443/documents/A30940600/details>

I'm looking to send this up as soon as possible, so grateful if you could let me know your thoughts.

Thanks,

[Redacted],

From: Wilson M (Mick) <Mick.Wilson@gov.scot>
Sent: 26 November 2020 15:30
To: [Redacted]; [Redacted],
Subject: RE: TALIS 2024 survey

[Redacted], – thanks for this.

I made a couple of comments.

On balance, I think I'd leave this as "straight" advice on TALIS and not get into other alternatives around SG surveys and so on at this stage.

M

Mick Wilson
Deputy Director, Education Analysis

From: [Redacted],
Sent: 24 November 2020 15:37
To: [Redacted],
Cc: Wilson M (Mick) <Mick.Wilson@gov.scot>
Subject: RE: TALIS 2024 survey

[Redacted],

Thanks for this, I've made a couple of suggestions.

Have copied in Mick for oversight on this – do we need to strengthen the case at all?

Thanks,
[Redacted],

From: [Redacted],
Sent: 24 November 2020 14:16
To: [Redacted],
Subject: FW: TALIS 2024 survey

Hi [Redacted],

See below for initial draft of a TALIS 2024 pros and cons paper. Let me know what you think.

Click on the link to open 'Learning Research - TALIS - Submission 24 Nov 2020' - <https://erdm.scotland.gov.uk:8443/documents/A30940600/details>

I contacted teacher policy colleagues (see response below) and they were content with approach that we are proposing.

Thanks,

[Redacted],

From: [Redacted],
Sent: 24 November 2020 11:55
To: [Redacted]; [Redacted]; [Redacted],
Subject: RE: TALIS 2024 survey

Hi [Redacted],

Nothing else to add and if DfE are pulling out I think that might strengthen our arguments for not joining plus it is currently not within our budgets. EIS always keen to push as it might strengthen their arguments re their 20:20 workload campaign for smaller classes and reduced class contact time.

Just as an aside has [Redacted], caught up with you yet as she received request from the SG hub in Paris about our non-participation which I suggested she forward to you?

[Redacted],

From: [Redacted],
Sent: 24 November 2020 11:34
To: [Redacted], [Redacted], [Redacted],
Subject: TALIS 2024 survey

Hi all,

As you may know, we are briefing DFM on the TALIS 2024 survey following an OECD invitation to take part.

With your input, we put together a note to DFM in 2019 based on feedback from various stakeholders (see attached). I've adapted this with more up-to-date information (for example, DfE have indicated that England will not take part).

DFM has asked for a further note which outlines the pros and cons of participating. I will put together this note today/tomorrow, but I am wondering if you have any thoughts either way that you would like to add in. Grateful if you could get back to me by mid-day Wednesday if you have any comments/thoughts.

Any questions, please let me know.

Thanks!

[Redacted],

Document 11

From: [Redacted],
Sent: 01 December 2020 09:58
To: Deputy First Minister and Cabinet Secretary for Education and Skills <DFMCSE@gov.scot>
Cc: Director of Learning <DirectorofLearning@gov.scot>; DG Education, Communities & Justice <DGECJ@gov.scot>; [Redacted], Anson S (Sam) <Sam.Anon@gov.scot>; Drought A (Andrew) <Andrew.Drought@gov.scot>; Wilson M (Mick) <Mick.Wilson@gov.scot>; [Redacted], [Redacted], [Redacted], [Redacted], [Redacted],
Subject: RE: DFM submission - Participating in the OECDs TALIS Survey 2024

PARTICIPATION IN THE OECD'S TEACHING AND LEARNING INTERNATIONAL SURVEY (TALIS) 2024

Deputy First Minister,

Following your request for further advice on the TALIS Survey 2024, please find attached a submission outlining the pros and cons of participating in TALIS. This follows an information briefing with OECD officials on the operation of TALIS.

A proposed response to the OECD is included in Annex A.

Happy to discuss further if needed.

Kind regards,

[Redacted],

From: [Redacted], **On Behalf Of** Deputy First Minister and Cabinet Secretary for Education and Skills
Sent: 23 November 2020 14:07
To: [Redacted],
Cc: Deputy First Minister and Cabinet Secretary for Education and Skills <DFMCSE@gov.scot>; Director of Learning <DirectorofLearning@gov.scot>; DG Education, Communities & Justice <DGECJ@gov.scot>; McAllister C (Colin) [Redacted], [Redacted], [Redacted], [Redacted], [Redacted], [Redacted], [Redacted], [Redacted],
Subject: RE: DFM submission - Participating in the OECDs TALIS Survey 2024

Hi [Redacted],

DFM has commented that he thinks this is a difficult one given the interest of the professional associations. DFM would appreciate some further advice on this.

Thanks.

[Redacted],

[Redacted], |Deputy Private Secretary to John Swinney MSP | Deputy First Minister of Scotland and Cabinet Secretary for Education & Skills | Scottish Government | St Andrew's House | Edinburgh | EH1 3DG |[Redacted],

From: [Redacted],

Sent: 17 November 2020 18:14

To: Deputy First Minister and Cabinet Secretary for Education and Skills
<DFMCSE@gov.scot>

Cc: Director of Learning <DirectorofLearning@gov.scot>; DG Education, Communities & Justice <DGECJ@gov.scot>; McAllister C (Colin) [Redacted], [Redacted], [Redacted], [Redacted], [Redacted], [Redacted],

Subject: DFM submission - Participating in the OECDs TALIS Survey 2024

PARTICIPATION IN THE OECD'S TEACHING AND LEARNING INTERNATIONAL SURVEY (TALIS) 2024

Deputy First Minister,

Please find attached a Ministerial Submission on the OECDs offer for Scotland to participate in the TALIS Survey 2024. Please note the MACCS case deadline for responding to the original letter is today (16/11/2020). Apologies for the delay in responding, this resulted from the requirement to gather information to put together this note. The proposed response to the OECD is included in Annex A.

Happy to discuss further if needed.

Kind regards,

[Redacted],

Document 12

From: [Redacted],

Learning Analysis
24 November 2020

Deputy First Minister and Cabinet Secretary for Education and Skills

PARTICIPATION IN THE OECD'S TEACHING AND LEARNING INTERNATIONAL SURVEY (TALIS) 2024

Purpose

1. Further to my submission dated 16th November 2020, DFM asked for further advice on the pros and cons of taking part in TALIS 2024 following an invitation from the OECD to take part.

Priority

2. Routine.

Pros and cons of participation

3. The following provides a high level summary of the pros and cons of participation in TALIS 2024.

Table 1: Summary of participation in TALIS

Pros	Cons
Trade union support: both EIS and SLS are supportive of participating as the focus of the survey is on workload.	High cost – it is estimated that the overall cost of participating would be in the region of £550k to be paid between 2020 and 2024. This is not currently identified within Learning Directorate budgets.
Data and analysis: provides data and analysis of teachers' and school leaders' perceptions of the value of their profession, their work-related wellbeing and stress, and their satisfaction with their working conditions.	SG Staff resources – additional staff resources would be required to commission, project manage and report on the findings.
Comparative analysis – 45 countries took part in TALIS 2018, allowing cross-country analysis to identify countries experiencing similar issues.	Lack of UK comparators – Wales and Northern Ireland do not take part in TALIS, while England have pulled out of TALIS 2024.

	Timeliness – meaningful time series comparisons are limited as the survey runs every 6 years
	Research burden – TALIS sets a high minimum sample size of 200 schools per country (around two-thirds of secondary schools) and asks participants to complete a detailed questionnaire. TALIS also involves a field trial of 30 schools (likely in October 2022), which means that a number of schools are likely to be involved in both TALIS and PISA over the next four years.

Pros

4. **Education unions in Scotland support participation.** Policy colleagues have undertaken informal conversations with stakeholders around participation in TALIS. Both EIS and SLS are supportive, which is unsurprising given the focus the survey provides on workload related matters; and the Education Scotland Professional Learning & Leadership team would have an interest in terms of being able to make international comparisons.
5. **TALIS would provide useful data and analysis on the views and experience of the teacher workforce in Scotland.** TALIS provides data and analysis of teachers' and school leaders' perceptions of the value of their profession, their work-related wellbeing and stress, and their satisfaction with their working conditions. It also offers a description of teachers' and school leaders' contractual arrangements, opportunities to engage in professional tasks such as collaborative teamwork, autonomous decision making, and leadership practices.
6. **TALIS allows cross-country analysis to identify countries experiences similar issues.** 45 countries took part in TALIS 2018, although only England took part in TALIS 2018 from the UK. England, Wales and Northern Ireland are not taking part in TALIS 2024.

Cons

7. **We estimate that the overall payments for TALIS 2024 would be in the region of £550k, to be paid between 2020 and 2024,** including payments to the OECD for participation and to contractors to undertake the fieldwork in Scotland. The core TALIS survey cost is EUR 130k which would be spread out over the four year TALIS cycle. A contractor would be required to undertake the fieldwork in Scotland, and we estimate that this would cost £450k based on costs for England. This is not currently identified within Learning Directorate budgets.

8. **Additional SG staff resources would be required to commission, project manage and report on the TALIS findings.** This would be a similar scale to arrangements for PISA.

9. **Scotland would be the only country in the UK taking part, limiting comparisons with similar systems.** England was the only country in the UK that participated in TALIS 2018. However, DfE announced at the end of September 2020 that England would not participate in TALIS 2024 in order to reduce ‘considerable workload burden’.

10. **TALIS is a large scale survey that would place a research burden on the education system.** TALIS sets a high minimum sample size of 200 schools and 4,000 teachers per country and asks participants to complete a detailed questionnaire. There are minimum response rates of teachers and principals to attain in order to ensure the collection of high-quality data. TALIS also involves a field trial of 30 schools (likely in October 2022), which means that a number of schools are likely to be involved in both TALIS and PISA over the next four years.

11. **There are other sources of the data and evidence that TALIS would provide.** GTCS have highlighted that their annual evaluation report on Professional Learning and Professional Update gives us a lot of what we would gain from TALIS. They also stated that they carry out a 5-year review of professional standards, and are now better resourced to engage more with practitioners through Professional Update. Analysts in Learning Analysis can undertake national surveys with similar content at a much lower cost, although this would lack international comparison. Trade unions in Scotland also undertake regular surveys on teacher workload.

Conclusion

12. You are invited to consider the pros and cons outlined in this submission and indicate how you would like to respond.

13. Our recommendation in our original briefing was that Scotland should not seek to join the TALIS programme. This recommendation was based on our assessment that TALIS does not offer value for money: the high cost of participation and SG resources required, which are not included in Learning Analysis budgets, allied to the lack of UK comparisons in the survey.

[Redacted],

30 November

Copy List:	For Action	For Comments	For Information		
			Portfolio Interest	Constit Interest	General Awareness
Minister for Children and Young People Minister for Further Education, Higher Education and Science					X X

DG Learning, Justice and Communities
Graeme Logan

Sam Anson
Andy Drought
Mick Wilson
[Redacted]
[Redacted]
[Redacted]
[Redacted]
[Redacted]

ANNEX A: PROPOSED RESPONSE TO OECD

Dear Andreas,

Thank you for your letter regarding participation in the OECD Teaching and Learning International Survey (TALIS).

I appreciate you sending information on the planning of the new cycle of TALIS and how Scotland can be involved, as well as an offer of setting up a call to discuss further.

We have considered the information provided on TALIS 2024 and have taken the decision that it is not the right time for Scotland to participate at this stage. However, please continue to consider Scotland for future surveys, and my officials will keep in touch with your own team to keep up to date with developments in the survey. I hope that TALIS 2024 can be carried out successfully.

Your sincerely,

Document 13

From: Director of Learning <DirectorofLearning@gov.scot>

Sent: 26 March 2021 11:07

To: [Redacted]

Cc: [Redacted]; Wilson M (Mick) <Mick.Wilson@gov.scot>; [Redacted]; [Redacted] McLean L (Liza) <Liza.McLean@gov.scot>; Taylor A (Alison) <Alison.Taylor@gov.scot>

Subject: RE: DFM submission on TALIS survey

Thanks [Redacted]. I am content to accept your recommendation not to take part in TALIS 2024. Graeme.

From: [Redacted]

Sent: 25 March 2021 12:14

To: Director of Learning <DirectorofLearning@gov.scot>

Cc: [Redacted]; Wilson M (Mick) <Mick.Wilson@gov.scot>; [Redacted]; [Redacted] McLean L (Liza) <Liza.McLean@gov.scot>; Taylor A (Alison) <Alison.Taylor@gov.scot>

Subject: DFM submission on TALIS survey

Dear Graeme,

The OECD wrote to DFM in November 2020 inviting Scotland to participate in Teaching and Learning International Survey (TALIS) 2024. At the time we had a meeting with OECD colleagues and sent a submission to DFM with official advice on participation. DFM sought further advice and this was provided in December.

Our recommendation in the submission was that Scotland should **not** seek to join the TALIS programme at this time. Although there is support for participation from some stakeholders, particularly the unions, the cost and school burden of the survey is prohibitive. The cost of participation is likely to be in the region of £550k, which would be paid in stages between 2020 and 2024. This is not currently identified within Learning Directorate budgets. In addition, SG staff resources would be required to commission, project manage and report on the TALIS findings. TALIS also sets a high minimum sample size of 4,000 teachers and 200 school principals per country and asks participants to complete a detailed questionnaire, which would place a significant burden on the school system. Further detail on TALIS, stakeholder views, and costs of taking part, are included in the attached submissions.

Despite repeated attempts, we did not receive a response from DFM on the second submission. In January 2021 DFM PO withdrew the case from MiCase system and have since indicated that if/when DFM considers the TALIS submission DFM PO would issue the response from their mailbox and not via MiCase (given how late it is).

The OECD have written again asking for a decision. They have not indicated a deadline for indicating participation but it is safe to assume from correspondence (and PISA experience) that the deadline will pass shortly.

Would you be content for us to respond to the OECD indicating Scotland will not participate in TALIS 2024?

If you have any questions, please let me know.

Kind regards,

[Redacted]

Document 14

Andreas Schleicher
[Redacted]

Our Reference: 202000105721
Your Reference: OECD Director for Education and Skills - TALIS 2024

Dear Andreas Schleicher,

Thank you for your letter regarding participation in the OECD Teaching and Learning International Survey (TALIS). I appreciate you sending information on the planning of the new cycle of TALIS and how Scotland can be involved, as well as an offer of setting up a call to discuss further.

We have considered the information provided on TALIS 2024 and have taken the decision that it is not the right time for Scotland to participate at this stage. However, please continue to consider Scotland for future surveys, and my officials will keep in touch with your own team to keep up to date with developments in the survey. I hope that TALIS 2024 can be carried out successfully.

Yours sincerely

JOHN SWINNEY