

Office for
Students

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English higher education 2020

The Office for Students
annual review





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Chair's foreword



Sir Michael Barber, OfS chair

At the point of last year's annual review, the preeminent achievement of the Office for Students (OfS) had been the registration of higher education providers. Then I set out three major future challenges: securing greater equity in the access and participation of students; establishing sector-wide financial sustainability; and improving the quality of teaching to deliver positive outcomes for students. Although the conditions of the last 12 months have been radically different from anything we could have predicted and despite some undoubted progress, those three challenges remain unchanged.

If anything, they are now more pressing and urgent. Through this period of challenge, it is vital we do not lose sight of our long-term ambitions to improve the diversity of the higher education sector, to continually enhance the academic experience of students, and to regulate providers' and the sector's financial sustainability so that it can continue to be world leading. These priorities can be distilled into the notion of stewardship: the steady focus on managing the higher education landscape in the interests of students and taxpayers for the

short, medium and long term, so that each of us, wherever we are in the system, is continuously striving to leave things better than we found them.

At the beginning of my term as OfS chair, I made clear that my top priority was to see radical and rapid improvement in both equality of opportunity and social mobility for students seeking to enter and progress through higher education. In response to our bold access and participation agenda, institutions have set out ambitious plans that, once delivered, will see the access gap in England's most selective universities halved within the next five years. Furthermore, the cumulative impact of providers' plans would see gaps in dropout rates and attainment significantly reduced by 2024-25.

These are crucial steps towards ensuring that access, progress and success through higher education and beyond are realities for all students with the ability and desire. This evolving agenda is crucial not just for individual students but also for universities and colleges, which can only benefit from including the full diversity of talent, and indeed for wider society and the economy, which is strengthened by unleashing the talent of all citizens.

The area most obviously and radically impacted by the coronavirus pandemic has been the delivery of teaching and learning. In spring this year, universities and colleges shifted to online teaching with impressive speed. I have been told that in some cases more progress was made in a month than in the previous five years. My review of digital teaching and learning, due to report

in early 2021, will set out how we can learn the lessons from this shift and ensure digital provision becomes a significant contributor – in myriad ways – to high-quality teaching and learning. This will require us collectively to ensure no student suffers from digital poverty; that every provider takes a whole-institution, strategic approach to digital transformation; and that opportunities to take teaching and learning to a new level are seized through ongoing dialogue with students. The pandemic forced a radical shift to online delivery; the disruptions and challenges involved will only be truly worthwhile if they lead to opportunities seized.

The last 12 months have been unexpectedly demanding for students, universities and the OfS alike. For the most part, the way in which these challenges have been met has served to highlight the remarkable resilience of this generation of students and the enduring value and appeal of a higher education. As we look ahead, it is the honour and responsibility of both the OfS and higher education providers to make and maintain, in the words of Václav Havel, 'the climate of civilisation', underpinned by the 'deep social importance' of scholarship and the pursuit of knowledge.





1. Chief executive's commentary



Nicola Dandridge CBE, OfS chief executive

Introduction

For English higher education, 2020 has been a year of challenge and resilience. In last year's review commentary, the issues I highlighted – relating to fair admissions, better student information, and improved teaching quality – assumed a sector with a predictable trajectory. Coronavirus upended that assumption. The pandemic required extensive changes to the ways students are taught, and how universities and colleges are run. Nonetheless, the themes of admissions, information for students and teaching quality have remained relevant throughout.

Existing inequalities have been exacerbated by the pandemic, though they have manifested themselves in different ways such as through digital poverty, in the difficulties some students have operating outside traditional course structures, and the particular impact of the disease on black, Asian and minority ethnic communities.¹ Lockdowns have also brought into even sharper focus students' mental health. We have seen the stark impact of fewer graduate opportunities – a situation unlikely to improve in the near future as the economic consequences of the pandemic

become clearer. Independently of the pandemic, the national policy environment has been changing too, with a lively debate taking place about the quality and value of degree courses, and the relationship between further and higher education.

The response of the sector and the OfS to these challenges is at the heart of my commentary this year. I describe the exceptional resilience and resolve that universities and colleges, and students, have displayed. I also look ahead to areas of priority for the OfS in 2021: raising the bar on quality and standards; maximising the potential of digital teaching and addressing digital poverty; and increasing opportunities for mature students.

Responding to the coronavirus pandemic

The national lockdown in March had an immediate and enormous impact on higher education. Often under immense pressure, universities and colleges found innovative ways to deliver online teaching, keep their students and staff safe, and contribute to the wider national scientific and health effort. Despite gloomy predictions in the spring, recruitment nationally has broadly held up.

In response to the crisis, the OfS was quick to adapt its regulatory approach to allow providers the space to focus on supporting students. We established realistic expectations for teaching quality, standards and student protection. We adapted our requirements for data collections, paused our consultations, and gathered information to monitor financial sustainability. We worked with our student panel to better support students during lockdowns, and

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sought to minimise long-term disruption and damage to the English higher education system while laying the foundations for recovery as quickly as possible.² We also worked collaboratively with the Department for Education and the sector to develop programmes for financial support, and support public health priorities.

Teaching and learning

Maintaining teaching quality and academic standards is at the heart of our regulatory role, and this has been even more important during the pandemic. As the transition to digital learning took place, many students faced unprecedented challenges in accessing lectures, tutorials and wider support. We have been particularly concerned about the impact of the pandemic on certain groups of students: international students, postgraduates and students who are vulnerable by reason of disability or for other reasons.

In guidance published in April, we emphasised the importance of universities and colleges continuing to do all they could to maintain the quality of courses and the credibility of their qualifications. Acknowledging the impact of coronavirus, we set out how we would adjust our approach to monitoring and enforcing our regulatory requirements.³ We followed this up with further guidance in June, which set out our approach to student protection.⁴

Since publishing these guidance notes, we have been monitoring this area by directly engaging with providers to find out how they are maintaining the quality of provision and how they are communicating changes; by requiring providers to report significant changes of provision to us; by polling students' views; and by monitoring data that may indicate problems with the quality of provision – for instance non-continuation rates.

Clear communication is important in any crisis. This was particularly the case for existing students in the face of changes in teaching provision and uncertainties caused by periods of forced isolation and the risks or reality of coronavirus outbreaks on campus. It was equally true for students starting courses this autumn, the disruptions to whose teaching and exams at school or college this summer had led to considerable uncertainty. Clarity of provider communications was a theme of our June guidance, and is something I have continued to highlight throughout the pandemic. It is not easy to be clear when so much is uncertain, but in these circumstances the need for clear communication with students is more important than ever. Students have consistently told us they want to be kept properly informed about what is happening and to know what their options are, so they can respond and make informed judgements, and they have a right to expect that.

Working from home has been a challenge for many during the pandemic. For students, these challenges also exposed the extent of digital poverty. Our polling in September showed that over two-thirds of students had difficulties finding a quiet space to study. Over half felt their learning had been impacted by a slow or unreliable internet connection, while around one in five had problems accessing a computer, laptop or tablet. More than half of students responding to the poll believed that their learning was damaged by lack of access to appropriate online materials, with one in 10 impacted severely.⁵ To address these concerns, in September we launched a review of digital teaching and learning, commissioned by the Department for Education and chaired by Sir Michael Barber, which will address these issues and report early next year.⁶

Financial sustainability, funding and admissions

Financial uncertainty resulting from the pandemic led to real worries that some universities and colleges would not be able to survive. There were fears that many home students would defer their places and international students would not come, making many courses – and some providers – unviable. Thankfully, the more extreme fears proved misplaced this year, although universities and colleges continue to face challenges, some more than others, and the financial consequences of the pandemic for providers are likely to be with us for some time.

Throughout the year, we worked closely with universities and colleges to protect students' interests. We engaged with individual providers where we were concerned about their financial sustainability, and we will continue to do so through the coming year as the effects of the pandemic play out. We have worked closely with the Department for Education to ensure that support from the Treasury, including access to business loans, was available to those that needed it.

When a provider or course is no longer viable, students' interests must be paramount. It is essential that they can easily continue their studies elsewhere. They also need good advice about their rights. Every university and college is required, as a condition of its registration with the OfS, to have a student protection plan. We will soon publish our decisions following our consultation on proposals that those providers at material risk will need to comply with specific directions to protect students.

An important part of the OfS's work relates to funding. For the 2019-20 academic year we have funded providers for the first time under the powers given to us under the Higher Education and Research Act 2017, distributing just under £1.25 billion in recurrent grants to 333 providers, including 37 that were not funded in 2018-19.⁷ This

funding supports high-cost courses, and activities to widen participation and secure successful student outcomes. Following a reduction of £58 million to our grant from government for financial year 2020-21, we were able to avoid reducing the grants that we had previously announced to providers for academic year 2019-20.⁸ We also provided £100 million in capital funding and funded strategic programmes addressing student mental health, and – jointly with Research England – student involvement in knowledge exchange.⁹

Earlier in the year, there was serious concern that those universities and colleges that could expand their UK student numbers would do so at the expense of other providers, causing widespread financial instability. There was also concern that financial pressures might lead some universities and colleges to mislead the students they recruited, or put pressure on them to accept unconditional offers. In response to these concerns, we consulted on a new temporary condition of registration, which we imposed in July, to prevent such practices for the coming year.¹⁰ We also initiated a review of admissions to ensure the higher education system was operating in a way that was fair and effective.

Public service

While the pandemic undoubtedly brought many challenges, it also highlighted the strengths of our higher education sector, and the strong sense of civic responsibility among its students and staff. Universities were on the frontline in expanding our medical understanding of the pandemic and in the search for treatments and vaccines. Some hosted Nightingale hospitals, others boosted the testing effort. Student nurses and doctors worked in hospitals before they might have expected to do so. Innovations came, not just in teaching and learning, but in the practical delivery of outreach and recruitment, and support for vulnerable students. Through a series of briefing notes this year we highlighted some of these innovations.¹¹

Our new phase of regulation

As we now seek to re-establish usual regulatory arrangements, we are reviewing our approach. Rather than aiming to reinstate our previous approach, we decided to draw on our experience of the last two years to take stock of how we regulate, how we should increase our expectations in terms of quality and standards, and how we could make good on the commitment in the regulatory framework that universities and colleges that do not pose specific increased risk should have less regulatory burden. In November, we launched a consultation that set out how we propose to do this, in particular setting out proposals for new and more challenging baselines for student outcomes, and allowing consideration of performance at subject level.¹²

Improving equality of opportunity

In January, we published the access and participation plans of over 200 universities and colleges. They showed a strong level of ambition, and a real commitment to narrowing persistent gaps in access, success while studying, and outcomes. Numerical targets underpin these plans. Taken together they would, for example, mean 6,500 extra students from the most disadvantaged areas would enter the most selective universities each year from 2024-25 onwards.¹³ In practice, as our analysis has shown, most of these students are from industrial towns and the most deprived parts of cities across the North and Midlands, and coastal towns throughout the country.¹⁴ The targets would also mean the gap between the proportions of white and black students who are awarded a 1st or 2:1 degree would drop from 22 to 11.2 percentage points.¹⁵

We issued guidance to universities and colleges in November 2020 which set out how they should report next year on the activity and financial support they delivered to students through their access and

participation plans during 2019-20, and on the impact the pandemic has had on the plans we have agreed with them from 2020-21 onwards.¹⁶

These plans are about more than gaps and targets. They are about enabling individuals to reach their potential: a student who is the first among his family and friends to study for a degree; a disabled student able to access and enjoy learning like everyone else; a care leaver getting the chance to study for a degree; a black student getting the first-class degree she deserves, placing her in line for a good graduate job.

The pandemic has had a mixed impact on access. Overall, more students from low-participation areas started in higher education this year. But those from higher-participation areas gained even more extra places, so that gap has widened. However, an expansion of places at the more selective universities has given greater opportunities for disadvantaged students.¹⁷

2020 was also a year when the wider public was reminded of the inequalities faced by black people in Britain. We continue to prioritise work on closing the degree attainment gap and have worked with Research England to identify the barriers for black, Asian and minority ethnic students progressing to postgraduate research. This has led to a joint funding competition to support projects that improve access to progression.¹⁸

In January, we launched a consultation on our expectations of how universities and colleges should prevent and respond to incidents of harassment – including racial and sexual harassment. Universities and colleges have been improving their procedures, after several high-profile cases in recent years highlighted the inadequacy of many current procedures. Our consultation set out a series of proposals to improve processes. Students should know how they can report incidents at their

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university or college, and feel confident that when they do their complaints will be addressed properly. Having paused the consultation because of the pandemic, we plan to relaunch it early in 2021.

The mental health and wellbeing of students have been a growing concern in recent years, and the pandemic has created heightened anxiety and depression for some. Increased pastoral support is important when more learning is happening online. We funded Student Minds to support a specific, time-limited digital resource, Student Space, in response to the pandemic. It complements the mental health support already in place through universities, colleges and NHS services in England and Wales, seeking to fill potential gaps in provision to ensure that all students have access to support they need. This year we appointed commissioners for the Disabled Students' Commission who were committed to making change for disabled students. The commission will help universities and colleges to remove the barriers preventing disabled students from accessing and succeeding in higher education and having the best possible experience during their studies.

The number of mature learners entering higher education has declined significantly over the past decade, particularly those studying part-time, whose numbers have fallen by more than half since 2010.¹⁹ Mature students include those who may have felt unable – or chosen not – to study for a degree after leaving school, as well as those seeking to expand their skills and knowledge, often for career advancement. There are many explanations for the decline. Some of it may reflect the higher numbers of 18- and 19-year-olds studying, and changes to eligibility for second degrees. In the 2020 intake, there has been a notable increase in full-time mature students, mainly driven by a rise in those accepted onto nursing courses.²⁰ Our analysis of access and participation plans has shown that mature students have not been prioritised by many

universities, despite overall low and falling proportions of such students in their own populations and the sector more broadly. As those that recruit higher numbers of mature students recognise, ensuring that courses respond to the needs of mature students requires flexibility and imagination. Traditional timetables often do not work for those who try to combine work and study, often with caring responsibilities.

As the pandemic continues to have a negative impact on our economy, many more people of working age are likely to need and want to improve their skills. There is a real prospect that mature graduates could be the backbone of regional recovery in some parts of England.

Looking forward to next year

Next year we will continue to promote and protect the interests of students across many of our activities, continuing to adapt our approach to reflect the new environment in which we are all now living and working. But there are three priorities I would wish to pick out: raising the bar on quality of standards; maximising the potential of digital teaching and learning, including tackling digital poverty; and a clearer focus on mature students.

Raising the bar on quality and standards

All students have the right to expect that their courses will be of high quality. That is particularly the case given that many of them will be paying tuition fees of over £9,000 a year. They rightly expect good teaching, the right support, and the chance to gain a qualification that will stand them in good stead after graduation.

A university or college's registration with the OfS gives its students the right to access government loans and study visas, as well as enabling it to apply for degree awarding powers and receive teaching grants. When we register universities and colleges, we assess their performance in relation to a

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range of indicators of quality, including continuation, completion and employment outcomes. All students – whatever their background – should expect their provider to deliver performance that meets a minimum acceptable level.

Poor-quality courses should be improved or no longer offered. The consultation published in November proposes a series of measures to define, monitor and take action regarding the quality and standards of courses that do not reach minimum requirements.²¹ We have also proposed that we should set increased and more challenging numerical baselines for our assessment of student outcomes, so students can have confidence in the quality of the courses offered by all English higher education providers. Our proposals would ensure that providers that recruit students from underrepresented groups and with protected characteristics are held to the same minimum level of performance as other providers, and would see consideration given to outcomes at subject level within providers, as well as at the level of the whole provider. We expect to consult further on our approach to baseline quality in due course.

The initial quality and standards consultation also explains, at a high level, the relationship between minimum baseline requirements for quality and standards, requirements for access and participation plans, and the anticipated approach to the Teaching Excellence and Student Outcomes Framework (TEF). We expect to consult on our future approach to the TEF after the government has published the independent Pearce review and its response. Our intention is to ensure that, as our future approaches to the regulation of baseline quality and the above-baseline assessment undertaken for the TEF are further developed, they combine to produce an overall approach to quality that delivers our regulatory objectives and ensures a coherent whole.

Getting this right has real social benefits. Better quality can bring greater equality, and strong economic and social benefits, not least in parts of the country that have been hit hardest by the pandemic, where skilled graduates will be crucial to recovery and regeneration.

Maximising the potential of digital teaching and learning, and addressing digital poverty

Since the start of the pandemic, most universities and colleges have adopted some form of remote teaching and learning. This shift to online provision has been driven by necessity, but also creates huge opportunities. As part of the review of digital teaching and learning led by Sir Michael Barber, we will be looking at how high-quality provision of this kind can be continued and delivered at scale in the future, and what opportunities are presented for English higher education in the longer term. Sir Michael's review will report in early 2021, and will inform our approach in the future.

The review will particularly focus on the digital poverty that the coronavirus pandemic has thrown into sharp focus. We will want to ensure that access and participation plans reflect the extent to which more students may need financial or digital support to access courses that are delivered remotely. We need to see creative ways to improve access for those who need to study away from traditional campus facilities, or who opt for distance or blended learning.

Improving opportunities for mature students

During 2021, we expect to see more demand from adults to study in higher education for retraining as we move out of the pandemic. This is a trend we need to encourage, not least as a way of ensuring

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that a highly skilled graduate workforce can support our national, regional and local economies, as they emerge from the impact of the pandemic and adapt to life outside the European Union. New lifelong loan entitlements will make learning more affordable for adults without A-levels. At the same time, there are more opportunities for mature students in areas like nursing.²²

2021 should be a year when we look more seriously at how courses could be made more attractive and responsive to mature students, and a year when more adults are encouraged to take up such opportunities.

During 2021, we will prioritise opportunities for mature students with improved advice and opportunities. In practice, this will include more nursing places as we work with Health Education England. It will mean collaborating with universities and colleges to ensure a greater focus on mature students in access and participation plans. It will also see better advice and support by increasing the focus of Uni Connect partnerships on working with employers and communities to support mature student participation, including a stronger role for further education colleges.



Notes

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- 12** OfS, 'Consultation on regulating quality and standards in higher education', November 2020 (available at www.officeforstudents.org.uk/publications/consultation-on-regulating-quality-and-standards-in-higher-education/).
- 13** This figure assumes that any closing of the gap in entry rates at high-tariff universities and colleges between the most and least represented groups is achieved by growth in the number of entrants from those areas least represented in higher education

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and no growth in the rest of the sector. OfS, 'Transforming opportunity in higher education', January 2020 (available at www.officeforstudents.org.uk/publications/transforming-opportunity-in-higher-education/), p23.

- 14** OfS, 'Low areas of young participation by parliamentary constituency', October 2020 (available at www.officeforstudents.org.uk/data-and-analysis/young-participation-by-area/get-the-area-based-measures-data/).
- 15** OfS, 'Transforming opportunity in higher education', January 2020 (available at www.officeforstudents.org.uk/publications/transforming-opportunity-in-higher-education/), p4.
- 16** OfS, 'Letter to accountable officers: Monitoring of access and participation plans 2019-20', November 2020 (available at www.officeforstudents.org.uk/publications/monitoring-of-access-and-participation-plans-2019-20/).
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2. Fair admissions and recruitment

Who gets to go to university or college and which one they go to is one of the most pressing issues both for individual students and the sector as a whole. As the A-level and BTEC exam results this year have shown all too clearly, issues of fairness and equality of opportunity are of paramount importance.¹

There is authoritative evidence that, despite the efforts of teachers, parents and pupils, the recent progress on narrowing the attainment gap between the most and least advantaged students has been put into reverse.² Schools and colleges will be particularly focused on supporting students from the most disadvantaged backgrounds as they prepare for the next stage of their education. For these students to make it to university, they need to beat the odds. While more of them are achieving this than ever before, much more needs to be done to level the playing field and unlock potential across all parts of the country.

We are clear that this cannot be the responsibility of schools and colleges alone. Universities are working with them to remove the barriers to success by raising expectations, broadening horizons and helping disadvantaged students to achieve the grades they need to secure a university place. This resonates with the OfS's first regulatory objective, to ensure that all students from all backgrounds with the ability and desire to undertake higher education are supported to access, succeed in, and progress from higher education.

Even before the pandemic, there were stark inequalities. Department for Education statistics show that only 26.3 per cent of state-funded and special school pupils who received free school meals at 15 entered higher education by the age of 19 in 2018-19, compared with 45.1 per cent of students who did not receive free school meals. In 2018-19, 57.8 per cent of pupils in the most educationally advantaged areas went on to higher education, compared with 27.3 per cent in the most educationally disadvantaged areas. This gap has narrowed: since 2009-10, the progression rate for the most advantaged has increased by 6.6 percentage points, compared with 9.3 percentage points for the most disadvantaged.³ Narrowing these educational inequities remains of critical importance.

To enable them to make informed choices, all potential students should be able to access clear and impartial information, advice and guidance about higher education. Disadvantaged students also need help to overcome the academic, financial and cultural barriers to progression. Better informed choices can result in more students choosing the right course to fit their interests, aspirations and qualifications. In turn, this improves their chances of completing their studies successfully and achieving positive outcomes later in life. Impartial and accessible guidance has been all the more important this year amid fears about how the pandemic would affect exam results and higher education over the short and longer term.

The pandemic had a severe impact on how grades were awarded, whether places at universities and colleges were granted, and whether prospective students were able to

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access necessary information and guidance about higher education given the closure of schools and limited access to advisers. Prospective students also needed to contend with the loss of learning in schools and colleges. Students, the sector, the OfS and the government all played a vital role in ensuring as far as possible that fairness and the required support could be maintained.

Information, advice and guidance for prospective students

By the middle of January 2020, over 568,000 prospective students had already applied through UCAS to start university in the autumn.⁴ Only a couple of months later, these and many more applicants found their schools and colleges closed, their exams cancelled, and opportunities to visit their potential campuses withdrawn because of the pandemic.

Choosing a higher education provider is complex and this year the pandemic added a huge amount of uncertainty to that decision-making process. Even with UCAS deadlines extended, prospective students were faced with a very different set of factors influencing their decisions about what, where and how to study from those they anticipated when they first made their applications.

Impact of coronavirus on choice

Providers had to move the face-to-face and on-campus activities they would normally offer online. Virtual open days quickly became the norm and may be here to stay in some form even as social distancing rules are relaxed.

Despite the challenges for providers in delivering these events, there are advantages for students: no travel costs, the ability to access resources online after the event, and greater flexibility to fit around other life commitments. Some providers were able to move their usual higher education and careers fairs online, allowing

prospective students to hear from multiple institutions at once with advice on the whole university experience. Providers used online chat functions, email, phone and social media to provide their applicants and offer-holders with the essential direct, one-to-one contact. Platforms like Unibuddy and the Student Room allowed prospective students to find out from current students what studying in lockdown was like.

Outreach activities for younger age groups similarly shifted to online or blended models. Summer schools, one-to-one mentoring and academic support programmes were all swiftly adapted by providers and third-sector organisations alike. With outreach primarily designed to support people from more disadvantaged groups – who are often the least likely to have good internet access – we saw many providers delivering print versions of online resources directly to students' homes, matching students with tutors who could work with whatever technology families had available, or even providing internet connections to those most in need. Disruption to core curriculum delivery for school pupils and the closure of libraries saw many providers stepping in to help bridge the gap, supporting pupils from Year 7 upwards with reading, writing, maths, creative subjects, careers planning and soft skills development.

The role of the OfS

Our guidance on consumer protection during the pandemic was clear that providers still had legal responsibilities to make certain information available to prospective and current students, including information about costs, complaints, terms and conditions and any changes to teaching methods.⁵ Beyond this bare minimum, many universities and colleges found innovative ways both to support those prospective students who were already known to them, and to reach out to those who might not traditionally have considered higher education.

2. Fair admissions and recruitment

The gaps identified in our student information, advice and guidance strategy concerning how different groups of students are able to access or act on information and guidance came into even sharper focus this year.⁶ But once the scale of the pandemic became clear, we worked quickly to develop additional resources to help applicants navigate the increasingly complex landscape. A regularly updated coronavirus hub on the Discover Uni website included information on key topics like school exams, the admissions process and student finance, as well as signposting other official and trustworthy sources of information.⁷ We also developed some downloadable resources for applicants and their teachers and advisers. These booklets – which could be easily printed by schools and sent to pupils struggling with internet access – included tips on researching options while waiting for results, advice on deciding whether to withdraw or defer, and a guide to what would happen after results came out.

The Uni Connect programme, funded by the OfS, brings together 29 partnerships of universities, colleges and other local partners. Working collaboratively, they aim to increase the number of young people from underrepresented groups who go into higher education by focusing on local areas where participation is low, and offering activities, advice and information on the benefits and realities of going to university or college. In response to the pandemic, these partnerships rapidly adapted their long-term, sustained outreach work with younger age groups, and refocused some of their activity on targeted information and guidance for Year 13 students who were due to start university or college in autumn 2020.

Admissions and accessibility during the pandemic

With the changes in how A-level results were awarded in the summer, largely using centre-assessed grades, some universities and colleges had more applicants than

places. In response, we emphasised that they should do all they could to make sure that those students with the grades and potential to succeed did not miss out on their first choice course.⁸ UCAS analysis showed that this applied to approximately 15,000 students.⁹

Where a course did not have the capacity to offer a place to a student, the university was encouraged to discuss reasonable alternatives, such as a place on another course or on the same course the following year. To ensure that as many students as possible could take up their places this year, the government lifted the cap on places for domestic students in medicine, dentistry, and undergraduate teacher training. It also provided OfS teaching grant funding for 2020-21 to assist with the higher costs associated with the increased capacity in subjects such as medicine, nursing, laboratory-based science and engineering.

We stressed that universities and colleges should continue to honour the commitments that they had already made to support vulnerable and disadvantaged students as they firm up conditional offers. On the whole, providers worked with government to ensure that as many students as possible secured places.

The uncertainty over how grades would be awarded and how that would affect their university or college places was challenging for many students. When they embark on their courses, some will need support because of loss of learning at school and to improve their wellbeing and mental health. Wellbeing services at universities have worked remotely during the pandemic, while the Student Space has been set up during the pandemic to provide information and support.

Unfair practices during the pandemic

In March, at the beginning of the lockdown, we decided to pause nearly all OfS consultations to reduce the burden on

English higher education 2020

higher education providers – including the admissions review. At the same time, it became necessary to consider the immediate impact of the pandemic on admissions. Universities and colleges were faced with a range of unprecedented challenges and were understandably concerned about a potential loss of income. The moratorium on unconditional offer-making announced by the Universities Minister on 23 March 2020 was a short-term measure to prevent universities and colleges from making offers that could put pressure on worried students to accept courses that might not be in their best long-term interests. It also aimed to prevent a destabilising effect on the sector, whereby some providers might have tried to secure a much larger share of a smaller pool of students.

During this time we developed proposals to prevent providers from engaging in conduct which, in the view of the OfS, could reasonably be expected to have a material negative effect on the stability or integrity of the English higher education sector. Following a consultation, in July, we introduced Condition Z3, a time-limited condition of registration which prohibits any higher education provider from making ‘conditional unconditional’ offers to UK students, where the ‘unconditional’ element is conditional on the student making the provider their first or only choice, and from making false or misleading statements about other providers which have the intention or effect of discouraging students from attending them.¹⁰ Other unconditional offers to UK students that could materially affect the stability and integrity of the English higher education sector could also be found to breach the condition. However, to provide clarity for providers and students, the condition expressly permits unconditional offers to be made to UK students in certain specified circumstances.¹¹ The condition was implemented specifically to manage the extraordinary circumstances associated with

the pandemic, and will not be in place after 30 September 2021, but could be removed earlier than that, following consultation.

The OfS had made clear before the pandemic that the rapid rise in unconditional offer making, particularly ‘conditional unconditional’ offers, was a cause for concern.¹² We had also highlighted how contextual offers identify the potential of students from disadvantaged backgrounds to succeed in higher education and their importance to making progress on fair access.¹³

Reviewing admissions

In February 2020, the OfS published an exploratory consultation looking at the admissions system. This consultation identified 10 issues ranging from the discrepancy between advertised and actual entry requirements through to stakeholders’ perceptions of whether the system is fair and effective.¹⁴ The OfS review proposed a set of changes to the ‘Schwartz principles’ of 2004 that should underpin a fair admissions system, with an emphasis on making the principles student- rather than provider-focused.¹⁵ In addition, it set out three possible models of admissions reform. These included reforming the current system without fundamentally altering the current admissions timeline, or moving to one of two different models of post-qualification admissions: post-qualification offers or post-qualification applications.

Although the OfS decided to pause its review as part of its reduction of regulatory requirements at the start of the pandemic, the questions we posed in the review have influenced further thinking. In November 2020, the Secretary of State for Education announced his intention to consult on reform of the university admissions system, signalling a desire for a shift to a new model of post-qualification admissions.¹⁶ Earlier that month, UCAS announced its intention to explore two possible models for post-

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qualification admissions,¹⁷ and Universities UK (UUK) published a set of recommendations from its own fair admissions review which also supported a change to post-qualification admissions.¹⁸ In line with the OfS's proposals in January 2020, UUK also recommended a set of changes to the Schwartz principles to make them more student-focused, a move that we welcome.

High-attaining students from underrepresented areas are more likely than others to receive grade predictions from their teachers that are lower than the grades they ultimately achieve and to encounter barriers to progression into higher education.¹⁹ This means that they are likely to benefit from a system in which offers are made on the basis of grades achieved rather than predicted grades, and where there is greater clarity about contextual offer making, particularly if this includes threshold entry requirements for particular groups of students and for the most selective courses.

Post-qualification admissions should not, though, be considered a 'magic bullet' for fair access to higher education. School attainment is still the most influential factor for university admissions and there is evidence that the pandemic may have reversed progress on narrowing the attainment gap to the position at the start of the last decade.²⁰ It will be crucial also for disadvantaged students to be supported through sustained advice and guidance in order to create pathways through to the right course for them. There has also, at this point, been only limited consideration of how the admissions system works for students other than those wanting to study full-time soon after school or college.

2021 actions

The events of the past year have demonstrated the centrality of higher education to the ambitions and expectations of students and prospective students, their families and communities throughout the

country. This makes it all the more important that students get the advice and support they need to make the right choices. At the same time, the admissions system needs to enable universities and colleges to identify students with the potential to succeed, and enable students to reach the course that will unlock their full potential.

To ensure fair admissions and clear guidance for students in the future, the OfS will take the following actions:

- Following the update of Discover Uni in autumn 2020, which involved a new look and feel and improved course pages, further content and functionality is planned, including a new and improved compare and search functionality for courses, and more content for international students and mature students.
- We will continue to be vigilant in monitoring the impacts of the pandemic to take action to support fair admissions.
- We will work closely with the Department for Education, UCAS and UUK on the next phase of their work. In doing so, we will consider whether there is a case for further investigation of the issues identified in our admissions review, in light of the proposals that emerge during the coming year. In particular, we will consider the extent to which any proposed reforms consider the experiences of part-time, mature, international and postgraduate students. If there is a case to relaunch our review of admissions with a more focused set of considerations, then we will do so.

Progressing to higher education can open up greater opportunities for students. Especially in the face of uncertain exam procedures, the admissions process must be underpinned by the principle and practice of fair and equal opportunity for all. Over the coming year we will explore how fairness and equity in admissions can be maintained and improved in the future.

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- 3** Department for Education, 'Widening participation in higher education 2020', July 2020 (<https://www.gov.uk/government/statistics/widening-participation-in-higher-education-2020>).
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3. Regulating in uncertain times

The OfS regulates higher education in England in the interest of students. In March 2020, we acted swiftly to adapt our regulatory approach in response to the unprecedented challenge of the lockdown. We are acutely aware of the challenges higher education providers continue to face, and we will continue to ensure that our regulatory response is fair and proportionate. Over the past six months, we have been reviewing how we implement our regulatory approach, drawing on our experience since the OfS's establishment. In so doing, we remain committed to the principle, set out in the regulatory framework, of focusing on the greatest risks to students while reducing burden for those providers without specific increased risk.¹

Registration in 2020

To be registered with the OfS a provider must, among other things, deliver successful outcomes for all its students, and demonstrate financial sustainability and good governance. To charge higher fees, it must demonstrate that it is working towards eliminating access and participation gaps for disadvantaged groups of students.

The OfS's regulatory principles²

The OfS's mission is to ensure that every student, whatever their background, has a fulfilling experience of higher education that enriches their lives and careers. This aim underpins our approach to regulation. Our four guiding principles are that students:

- Are supported to access, succeed in, and progress from, higher education.
- Receive a high-quality academic experience, and their interests are protected while they study or in the event of provider, campus or course closure.
- Are able to progress into employment or further study, and their qualifications hold their value over time.
- Receive value for money.

Once registered, providers and their students gain a number of benefits. Students can apply for government-backed tuition fee and maintenance loans, and for Disabled Students' Allowances. A provider can apply to UK Research and Innovation for funding, to the Home Office for a licence to recruit international students, and to the OfS for the right to award degrees and call itself a university.

The OfS Register is a single, authoritative list which assures students and taxpayers that a particular university or college meets minimum requirements across a series of measures which, taken together, mean that

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it offers high-quality teaching, learning and support for its students. Providers are monitored on an ongoing basis according to the level of risk they pose to students.

In November 2020 there were 414 higher education providers on the OfS Register.³ They reflect the range and diversity of English higher education – a key strength of the system – and include universities, colleges and a variety of other higher education providers, some of them recently established.

The vast majority of registrations took place in the first two years of the OfS's existence. In 2020, numbers of applications and registrations fell sharply as demand decreased. In March, as the pandemic intensified, we decided to suspend consideration of new registration applications on a temporary basis. The registration process is robust and comprehensive; we need to assure ourselves (and thereby give confidence to students and taxpayers) that applicants meet our conditions of registration, and we did not consider that the rigour required was realistic during the pandemic. We did, however, continue to assess a small number of applications and we have now resumed assessment of paused applications.

Revised approach, March to July 2020: Three primary objectives

As the March 2020 national restrictions began, we set out three objectives to underpin our response. We said we would:

- Support the government's objectives by sharing information with providers and enabling them to respond effectively.
- Protect students by working with providers to develop practical ways to maintain teaching quality and standards, enable adequate exams and assessment, and support financial sustainability.
- Seek to minimise long-term disruption to the English higher education system, reducing permanent damage and laying the foundations for the sector to recover as quickly as possible once the pandemic is over.⁴

The lack of clarity and general disruption characterising this phase of the pandemic presented enormous challenges for students and providers, as it did for society at large. Decisions had to be taken in the context of limited information, changing government and public health advice as the disease altered course, and the unfolding situation in the sector. To minimise regulatory burden for providers, we significantly reduced our reporting requirements. This allowed us to focus on immediate risks associated with unexpected course or provider closure and short-term financial risk.

A priority for the OfS throughout this period was to ensure that providers maintained teaching quality. Equally pressing, with end-of-year examinations imminent for many students, was the need to ensure assessments and examinations were reliable and standards secure. In June we published guidance for universities and colleges setting out our expectations, including that they should communicate clearly and promptly with their students about changes to the delivery of teaching and assessment.⁵

The OfS is a principles-based regulator, and this informed our approach. As usual, we were clear in all our communications that we were not prescribing particular approaches or mandating providers to comply with detailed requirements. In a hugely uncertain environment, it was especially important that providers were able to take difficult decisions which reflected their local context and the needs of their students. Our regulatory focus continued to be on outcomes for students – it remained for each higher education provider to determine how best to deliver high-quality teaching,

assessment and support. We also made clear that providers making reasonable efforts to do this would not be penalised.

Resetting the regulatory dial

In July 2020, the OfS announced the phased resumption of our regulatory requirements.⁶ We do not intend to reinstate them exactly as before. Instead, drawing on our experience of the last two years, we shall target our work to ensure that it is focused where it is most needed.

Having consulted where appropriate, we will publish revised guidance on how we will monitor universities and colleges in relation to our regulatory requirements, and on when and how we may intervene. We also will establish a new timeline for our consultation on harassment and sexual misconduct in higher education and start a conversation with students, universities and colleges and others on our emerging regulatory approach to freedom of speech and academic freedom.

Our primary focus is on the conditions relating to access and participation (the 'A conditions') and quality and standards (the 'B conditions'). In practice, this means we want to identify universities and colleges performing below, or close to, the minimum requirements set out in our conditions of registration: in other words, those that pose the greatest risk to students. We then decide whether and how to intervene, depending upon the risks posed. For example, high-quality providers that deliver successful outcomes for students from all backgrounds should experience reduced regulatory burden as a result of our regulation of quality.

In the next two chapters we explore in detail our twin approaches to teaching and quality, and access and participation.

Notes

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4. Ensuring high-quality teaching and learning

During the pandemic, most universities and colleges that were not already following this model switched to online learning and teaching. Many responded to the initial period of lockdown with considerable ingenuity, running academic and social activities virtually and offering students tailored support to keep them on track.

The pivot to online learning was challenging. Yet it provided greater flexibility for students, and has the potential to be more inclusive if the right infrastructure is in place. This can be particularly valuable for mature students, who are likely to be balancing their studies with caring or work commitments. Many disabled students have welcomed the more widespread use of technologies they have been advocating for some time. During the pandemic, we continued with the National Student Survey (NSS) to ensure that student views continued to be heard.

The transition has not been universally smooth and successful: students' experiences of the quality of their courses during lockdown have varied significantly.¹ The OfS is committed to ensuring that the English higher education system is providing high-quality teaching and learning. We have various mechanisms for ensuring this: baseline regulation through the B conditions, using the TEF to incentivise improvement above the baselines, and the information we publish to inform student choice.

In June 2020, the Secretary of State for Education requested that the chair of the OfS, Sir Michael Barber, conduct a review of digital teaching and learning in the higher education sector in the context of the rapid shift to scaling up online delivery during the pandemic. The Secretary of State asked the review to consider how providers could continue to enhance the quality of online delivery for the next academic year, and to examine longer-term opportunities to develop and innovate in digital and online provision.

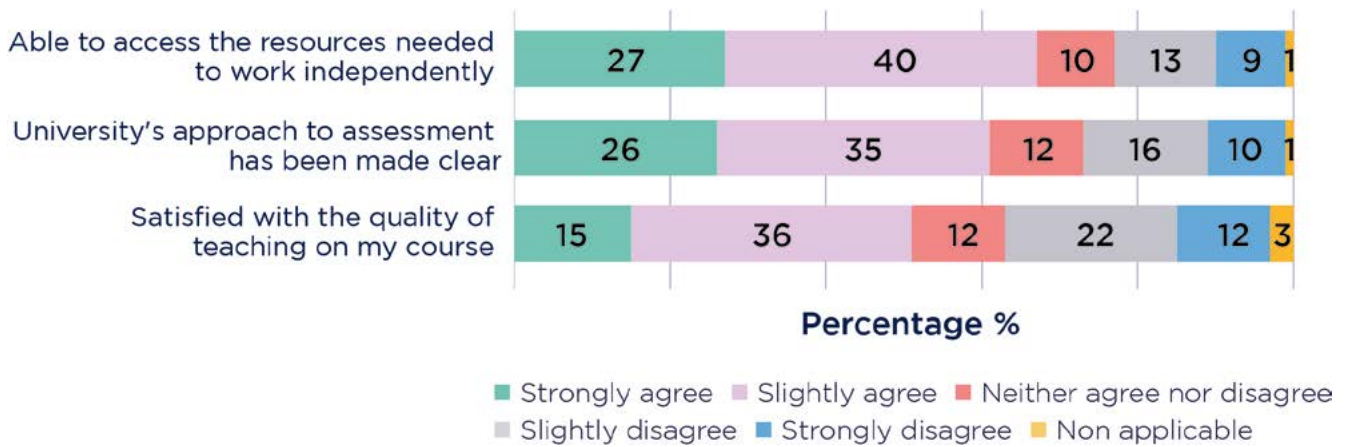
We know that high-quality teaching and learning are among the most important things students expect from their degree. In the OfS's survey of student perception of value for money, 94 per cent said that 'quality of teaching' was a very important factor when demonstrating value for money.² The OfS regulates to ensure that students can be sure their university or college meets minimum quality requirements.

Remote and blended learning

During the early stages of the pandemic, universities and colleges suspended face-to-face teaching and moved to online teaching to limit the spread of the virus. As most higher education providers did not provide significant volumes of remote teaching, much of the early work was aimed at ensuring that teaching could be provided online. This included teaching staff shifting to online lectures and seminars, librarians providing more materials online, and support staff moving to remote support.

In June 2020, our polling contractor polled 1,416 students for us about the teaching,

Figure 1: Students’ perceptions of course delivery during the first national coronavirus lockdown³



learning and assessment they had received during lockdown. 51 per cent were satisfied with the quality of this teaching, while 34 per cent were not (see Figure 1).

A large proportion of students reported their learning was mildly, moderately or severely impacted by technological disruption and lack of study space. Over half of students said their learning was disrupted by slow or unreliable internet. Nearly a fifth said their studies had been negatively affected by lack of access to a computer or tablet. Over half did not have access to good online course materials. More than two-thirds lacked access to a quiet study area. This survey suggests that a significant number of students had their access to remote education disrupted.⁴

To examine the quality of teaching during the pandemic, the OfS’s chair recently launched a review of digital teaching and learning. The review is examining what worked, and what did not. It will make recommendations for how universities can ensure that the lessons from delivering learning during this period are not lost. The review is ongoing and due to be published in spring 2021.

This academic year, most universities are delivering a system of blended learning, which includes a mix of online and in-person lectures and tutorials. The challenges of this form of learning depend to a certain extent

on the course of the pandemic. Local and national lockdowns may mean that providers in those areas may have to do all of their teaching remotely.

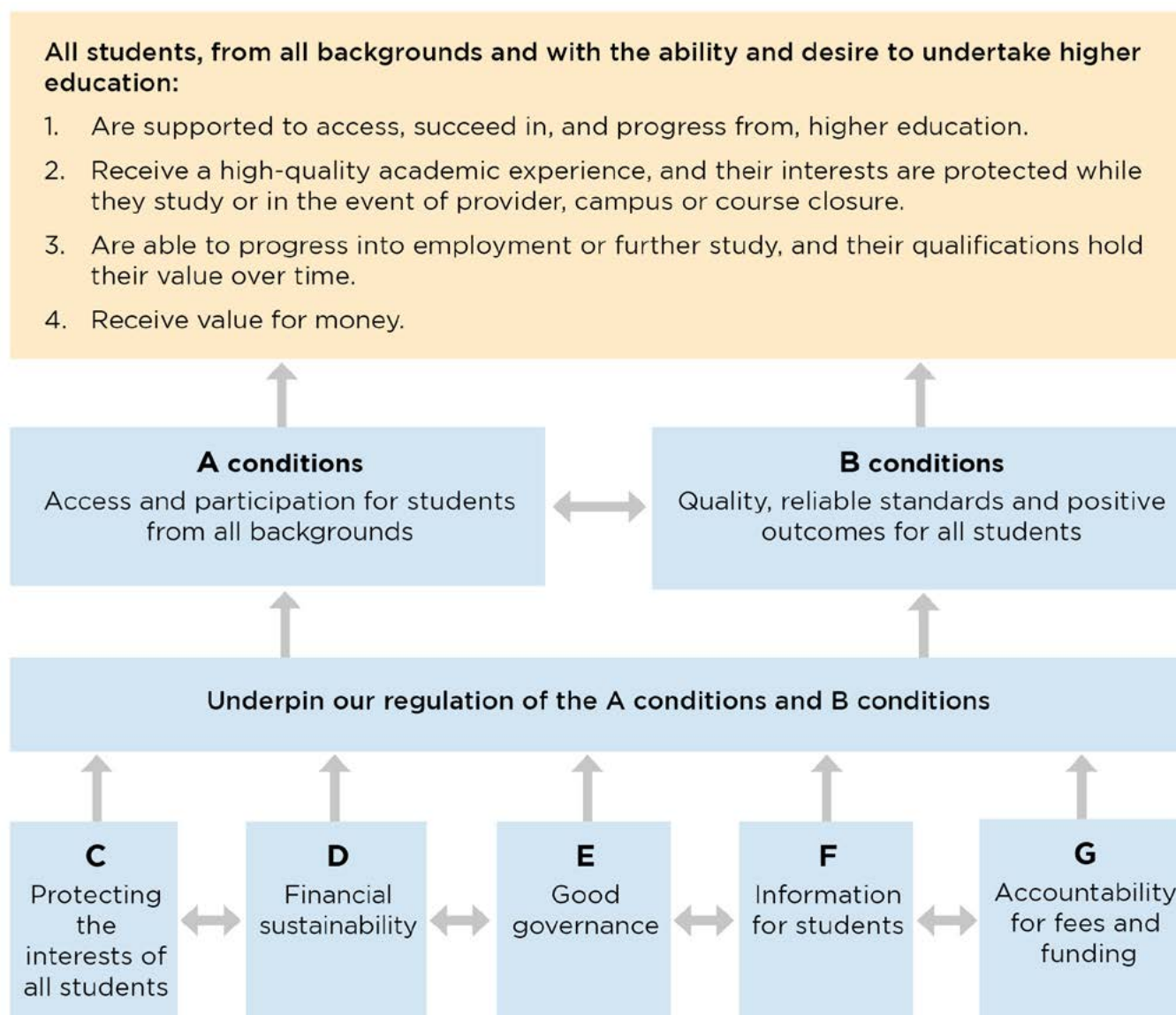
Quality and standards

Quality and standards flow through all of our regulatory objectives. This is to ensure that all students, from all backgrounds, with the ability and desire to undertake higher education, receive a high-quality academic experience. In the regulatory framework, we committed to addressing poor-quality provision (see Figure 2). To date, we have refused registration to a number of providers because of concerns about quality.

Since April 2018, we have made assessments of providers seeking registration in relation to the initial B conditions as part of the registration process. We also imposed post-registration requirements on a number of providers because we considered the risk of a future breach of one or more of the B conditions was increased. Subsequently, we have reviewed the action plans produced by these providers and, for some of them, considered the outcomes of reviews by the designated quality body.⁵ We have also considered cases where our analysis suggests that there is evidence of unexplained grade inflation in the classification of undergraduate degrees.

4. Ensuring high-quality teaching and learning

Figure 2: OfS conditions of registration⁶



OfS regulatory work on teaching and learning

The OfS is committed to supporting improved quality of teaching and courses at the providers we have registered. Here, indicators such as continuation, completion and progression to employment or further study are part of our assessment of the outcomes delivered for students. We are consulting on whether our requirements for quality are sufficiently demanding to ensure that all students receive a good education and successful outcomes.

We expect universities and colleges to take all reasonable steps to improve access to higher education for the most disadvantaged, and to narrow the gaps between the outcomes achieved for these students and the most advantaged. All students are entitled to the same minimum level of quality. We do not accept that students from underrepresented groups should be expected to accept lower quality and weaker outcomes than other students. We do not bake their disadvantage into the regulatory system by setting lower minimum requirements for providers that typically recruit these types of students.

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We recognise that this presents a challenge for higher education providers: if they are to recruit students from underrepresented groups, they have to commit to supporting these students to succeed. Many universities and colleges deliver on this challenge. However, other providers are not yet meeting this challenge and, while they may provide opportunities for such students to access higher education, too often we see low continuation rates and disappointing levels of progression to professional employment or further study. This is where our regulatory attention needs to focus and we commit more resources to these providers.

Requiring a minimum level of outcomes for students from all backgrounds will remain a central part of our regulatory approach. But we also need to recognise risks to quality and standards that arise from, for example, badly designed or delivered courses, or weakness in academic support, or digital poverty. We are interested in identifying those providers that represent the greatest risk to students – in other words, those that are performing below, or close to, the minimum baseline – and intervening to require improvement. This means that the highest-quality providers, those that deliver successful outcomes for students regardless of their backgrounds, should experience minimal regulatory burden arising from our quality and standards requirements. Conversely, those providers performing below the minimum baseline are likely to experience significant regulatory attention, including the use of the OfS's enforcement powers.

In November, we launched a consultation that made preliminary policy proposals about the minimum baseline requirements we set for higher education providers, and our approach to ensuring these requirements are met.⁷ The proposals include:

- Defining quality and standards more clearly for the purpose of setting minimum baseline requirements.
- Defining standards to include new sector-recognised standards for the classifications awarded for undergraduate degrees.
- Expressing some initial conditions that relate to quality and standards differently from equivalent ongoing conditions, to ensure our regulatory approach reflects the context for providers that may not yet have delivered higher education.
- Clarifying the way in which our regulation of quality and standards applies to partnership arrangements and transnational education.
- Setting increased, more challenging, numerical baselines for student outcomes that apply to each indicator and all providers. We have proposed that numerical baselines will not be adjusted to take account of differences in performance between demographic groups.
- Considering a provider's performance at a more granular level, including performance at subject level, in courses delivered through partnerships, and for students studying outside the UK.
- Improving transparency in relation to the indicators used to regulate student outcomes.
- Clarifying the indicators and other information that we should use to monitor compliance with quality and standards conditions.
- Establishing an appropriate balance between the regulatory burden that intervention places on providers and our ability to regulate effectively in the interests of students.
- Setting out how we would use a range of approaches, including where necessary our investigatory powers, in our engagement with providers to incentivise compliance.

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- Indicating how we would use the full range of our enforcement powers when there is a breach of the B conditions, including, in the most serious cases, deregistration.

The consultation is taking place at an early stage of our policy development. We expect to consult again on more detailed proposals early in 2021.

National Student Survey

The NSS is an annual survey that captures students' views on their courses. More than 300,000 students respond each year; in 2020, it had a response rate of 69 per cent.⁸ In gathering students' perceptions about key aspects of the academic experience, NSS data has three main objectives: providing information for prospective students to help them understand how well different courses are run; supplying universities and colleges with data to improve their students' experience; and supporting public accountability. The NSS provides insights at a sector level through course-, subject- and provider-level results, including through TEF metrics. The survey shows considerable variation between providers. For example, in responses to Question 15, 'The course is well organised and running smoothly', there is a 29 percentage point difference between the bottom 10 per cent of providers (where 49 per cent or fewer of students agree) and those in the top 10 per cent (where 78 per cent or more of students agree).⁹ This shows that while most students are happy with how their courses are run, there remains room for improving organisation at some providers.

The OfS is currently reviewing the NSS following a request by the Universities Minister to investigate concerns that the survey creates too much burden for providers and is driving down standards. The first stage of the review is exploring the unintended and unanticipated consequences of the NSS on providers' behaviour, including whether it drives the lowering of academic

standards and grade inflation, and how this could be prevented. It is also examining the question of burden: the appropriate level at which the NSS could continue to provide reliable data on students' perspective on their subjects, providers and the wider system, and whether a universal annual sample is necessary. The second stage will look more widely at the role of the NSS, including which questions should be asked to support regulation and student information across all four countries of the UK. We sought to gain the views of a range of stakeholders including students at different stages of their studies; those in leadership and academic roles within universities, colleges and other providers; sector stakeholder groups; publishers of student information; and others with an interest in the results. We have worked closely with students, through multiple student workshops including a joint one with the National Union of Students, and we have also run a representative poll with students and a survey of students' unions. Members of the student panel have also been closely involved with the review. We expect to have completed the review by the end of 2021.

Teaching Excellence and Student Outcomes Framework

The OfS incentivises excellence in teaching and outcomes beyond the minimum regulatory baseline through the TEF. The current TEF looks at the learning environment and the educational and professional outcomes achieved by students, as well as the quality of teaching, and has demonstrated its value in focusing attention on these issues across the higher education sector.

We expect to consult on our future approach to the TEF after the government has published Dame Shirley Pearce's independent review of the TEF,¹⁰ and its response. Our proposals for this future consultation will likely be informed by these publications, and by findings from the OfS's subject-level TEF pilots.¹¹

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We want to build on progress made through the TEF to date and develop a new version of the exercise that will further incentivise teaching excellence among universities and colleges. We want to ensure that this new version works in the best interests of students without unduly burdening providers. Our intention is to ensure that our approach to regulating the minimum baselines contained in the B conditions and the above-baseline assessment undertaken for the TEF combine to produce a coherent overall approach to quality that delivers our regulatory objectives.¹²

Student protection and market exit

The pandemic and the consequent government restrictions meant that (in most cases) higher education providers needed to make rapid and significant changes to the ways they delivered teaching and assessment. At the same time, all universities and colleges were expected to continue to comply with consumer protection law and to uphold their contracts with students. Recognising the difficulties of delivering courses and assessments in the same way, in June we issued guidance to providers setting out our expectations that they should give all their students clear, accessible and transparent information about what they could expect.¹³

Students are consumers, and consumer protection law continued to apply throughout the disruption caused by the pandemic. It was important for providers to ensure that their terms and conditions remained fair and transparent, and that students had continued access to accessible, clear and fair complaints processes. We published student and consumer protection guidance to address this issue, emphasising that universities and colleges needed to ensure that prospective students should have clear and timely information about how their courses would be delivered, and

existing students should be provided with information about any adjustments to their courses and assessment.¹⁴

Students have faced significant disruption. Some caught coronavirus; others needed to self-isolate; many were unable to move from their term-time accommodation, or were less able to access and effectively participate in remote learning. Our guidance emphasised the importance of considering how providers' approaches to the situation affected all students, particularly those who might be most vulnerable to disruption.

Given the impact of the coronavirus pandemic on higher education providers, we announced in March 2020 that we were pausing planned consultations.

Exceptions to this rule were our consultations on the stability of the sector and student protection issues, bearing in mind the potential risk to students of the market exit of a provider. We therefore launched a consultation in July 2020 that focused on student protection issues that might arise where there is a material risk of market exit. Following a consultation, we made a decision to amend the regulatory framework so that providers would be required to comply with 'student protection directions' issued by the OfS as a result of a new general ongoing condition of registration.

Degree value

One of our roles is to ensure that qualifications hold their value over time. In simple terms, a first-class degree awarded now should represent broadly the same level of student achievement as one awarded in five or 10 years' time.

In 2018-19, 29.1 per cent of students were awarded a first. This represents only a slight increase from 2017-18 when 28.9 per cent of students received a first, and a substantial slowing-down of the previous year-on-year increase.¹⁵

4. Ensuring high-quality teaching and learning

In 2019-2020, there could well be another increase in the number of firsts, as many providers adopted more flexible approaches to assessment arrangements because of the pandemic. For example, some providers operated a range of 'no detriment' policies to ensure that students were not unfairly penalised by the disruption during the spring and early summer.

2021 actions

The uncertainty relating to the delivery of teaching during this academic year means that our work as a regulator is more important than ever. To ensure that universities and colleges continue to provide quality teaching and learning, during the coming year we will:

- Conclude our online teaching and learning review.
- Publish the findings of our consultation on quality.
- Consult on our future approach to the TEF.
- Conclude our review of the NSS, and publish the findings.

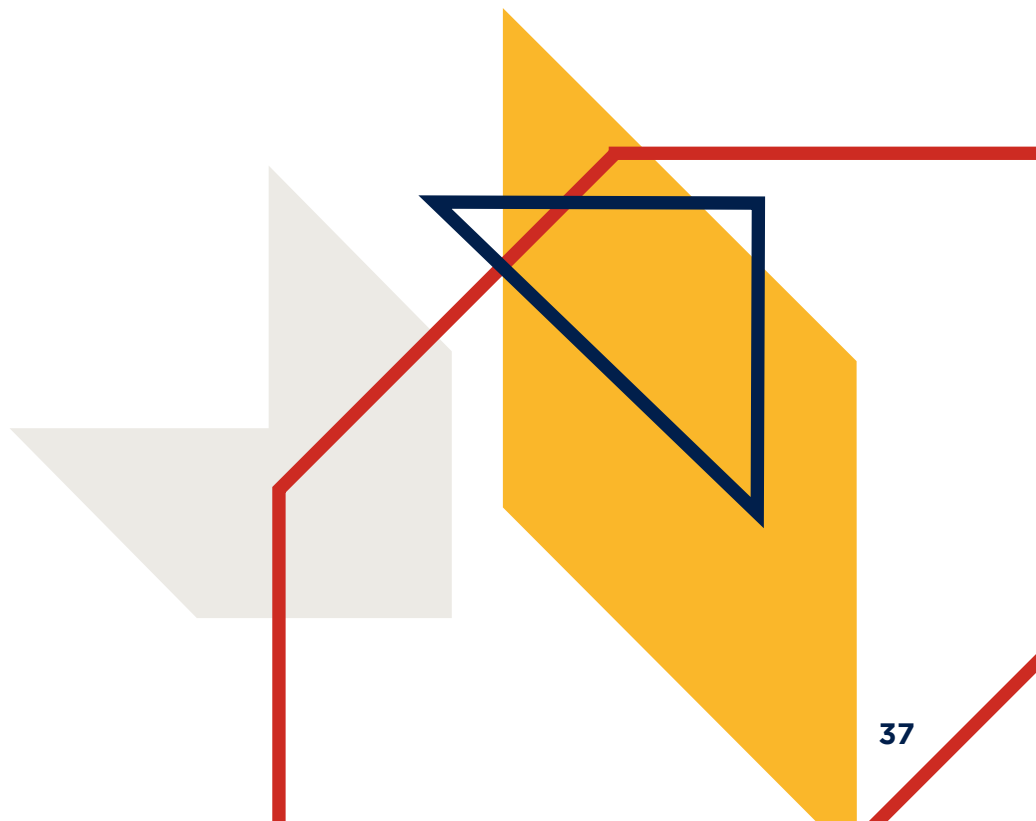


Notes

- 1** OfS, “Digital poverty” risks leaving students behind’, September 2020 (www.officeforstudents.org.uk/news-blog-and-events/press-and-media/digital-poverty-risks-leaving-students-behind/).
- 2** Trendence UK, ‘Value for money: The student perspective’, March 2018 (available at www.officeforstudents.org.uk/news-blog-and-events/press-and-media/new-research-shines-spotlight-on-student-perceptions-of-value-for-money/), p16.
- 3** The responses collected have been weighted to correct for the under- and overrepresentation of some student groups. See OfS, “Digital poverty” risks leaving students behind’, September 2020 (www.officeforstudents.org.uk/news-blog-and-events/press-and-media/digital-poverty-risks-leaving-students-behind/).
- 4** The responses collected have been weighted to correct for the under- and overrepresentation of some student groups. See OfS, “Digital poverty” risks leaving students behind’, September 2020 (www.officeforstudents.org.uk/news-blog-and-events/press-and-media/digital-poverty-risks-leaving-students-behind/).
- 5** UK Government, ‘Higher Education and Research Act 2017’, (<https://www.legislation.gov.uk/ukpga/2017/29/section/23/enacted>), section 23.
- 6** This provides a simple visual representation of the relationships between the areas we regulate through different groups of conditions. It does not represent a hierarchy in which compliance with some conditions is more important than compliance with others. All providers are required to comply with all applicable conditions of registration as set out in the regulatory framework.
- 7** OfS, ‘Executive summary: Consultation on regulating quality and standards’, November 2020 (available at www.officeforstudents.org.uk/publications/consultation-on-regulating-quality-and-standards-in-higher-education/), p2.
- 8** OfS, ‘National Student Survey – NSS’, October 2020 (www.officeforstudents.org.uk/advice-and-guidance/student-information-and-data/national-student-survey-nss/get-the-nss-data/). OfS analysis showed that the results had not been strongly impacted by the pandemic. OfS, ‘National Student Survey 2020: Analysis of the impact of the coronavirus pandemic’, July 2020 (www.officeforstudents.org.uk/publications/nss-2020-analysis-of-impact-of-coronavirus/).
- 9** OfS, ‘National Student Survey – NSS’, October 2020 (www.officeforstudents.org.uk/advice-and-guidance/student-information-and-data/national-student-survey-nss/get-the-nss-data/).
- 10** UK Government, ‘Teaching excellence framework: Independent review’ (<https://www.gov.uk/government/groups/teaching-excellence-framework-independent-review>).
- 11** OfS, ‘Subject-level pilots’, July 2020 (www.officeforstudents.org.uk/advice-and-guidance/teaching/future-of-the-tef/subject-level-pilots/).
- 12** This is set out in further detail in Annex D of our consultation on regulating quality and standards in higher education. OfS, ‘Consultation on regulating quality and standards in higher education’, November 2020 (available at www.officeforstudents.org.uk/publications/consultation-on-regulating-quality-and-standards-in-higher-education/), pp54-55.

4. Ensuring high-quality teaching and learning

- 13 OfS, 'Guidance for providers about student and consumer protection during the coronavirus (COVID-19) pandemic', June 2020 (available at www.officeforstudents.org.uk/publications/guidance-for-providers-about-student-and-consumer-protection-during-the-pandemic/).
- 14 OfS, 'Student and consumer protection' (www.officeforstudents.org.uk/advice-and-guidance/coronavirus/provider-guide-to-coronavirus/student-and-consumer-protection/).
- 15 OfS, 'Official statistic: Key performance measure 18', November 2020 (www.officeforstudents.org.uk/about/measures-of-our-success/outcomes-performance-measures/students-achieving-1sts/).





5. Supporting all students to succeed

Fairness and opportunity in access to higher education are more important than ever before. As we have seen during the coronavirus pandemic, they are central to the ambitions and expectations of families and communities throughout the country. Universities and colleges have ambitious plans that set out how, over the next five years, they will support the most disadvantaged students to access their courses, thrive in their studies and progress into graduate careers.

The OfS agrees and oversees these plans, and their delivery. We agreed new plans last year which, if realised, will see an extra 6,500 disadvantaged students each year entering those universities with the highest entrance requirements. There have been improvements at high-tariff providers this year and the challenge will be to build on that progress in the future.¹ While these plans have been disrupted by the pandemic, the OfS is working with providers to get them back on track. Where a student comes from, their identity or their life experience should not determine their chances of getting into a course, completing it successfully, and progressing to a successful career or to further study.

Despite progress in recent years, however, this is still not happening sufficiently. Certain groups remain underrepresented in higher education, and gaps in access and outcomes for disadvantaged students persist. The pandemic has thrown existing social and economic inequalities into stark relief. Its impact, and the effect of lockdown, have also given rise to new disparities. School closures during the first lockdown are expected to have exacerbated inequalities and widened the existing attainment gap between disadvantaged children and their peers.²

Similarly, in higher education it appears that students with disadvantaged backgrounds or specific needs are being more adversely impacted by the pandemic. During the first lockdown, the move to online teaching benefitted some students more than others.³ The mental health and wellbeing of students during lockdown have been at risk.⁴ Unequal access to computers and the internet means that some students have struggled to access lectures and seminars.⁵

Universities and colleges have risen to these various challenges – adapting learning and teaching approaches, moving welfare services online, offering careers advice remotely, and ensuring exams are accessible. Open days have gone virtual and Uni Connect partnerships have continued to provide advice to the most disadvantaged. Students' unions have distributed food parcels and delivered essential goods to students who are shielding.

We have worked with providers throughout this period to support them in meeting these challenges. While we have been clear that they should continue wherever possible to honour the commitments in their access and participation plans, we know that the pandemic has disrupted the delivery of 2019-20 plans, and is likely to affect activity during at least the first year of plans for 2020-21 onwards. In summer and autumn 2020 we gathered sector-wide evidence to help us understand the nature of this disruption. This has informed our continuing approach to access and participation plan regulation.

Access and participation during the pandemic

In March 2020, when the first lockdown began, the OfS highlighted a number of student groups who were likely to be especially vulnerable to its effects: those suffering from coronavirus or who needed to self-isolate, international students, students who had experienced care or were estranged from their families, and disabled students.⁶ These students required support during the early days of the pandemic for various reasons – for example, because of specific support needs or difficulties in finding alternative accommodation if needed.

As the pandemic developed, it became clear that other groups were vulnerable. Black, Asian and minority ethnic groups have been disproportionately impacted by the virus;⁷ all students without family support were at greater risk of not having adequate accommodation or pastoral support;⁸ postgraduate research students were struggling to complete their degrees on time; students who were lesbian, gay, bisexual, transgender or of other minority sexualities or gender identities (LGBT+) may have had to move to live with unaccepting friends or family, or have restricted access to healthcare.⁹ We produced briefing notes on students without family support and

Disabled Students' Commission

The Disabled Students' Commission (DSC) was announced by the government in June 2019 to take forward the work of the Disabled Students Sector Leadership Group. Professor Geoff Layer was appointed DSC chair as part of this announcement. The OfS nominated Chris Millward, the OfS's Director for Fair Access and Participation, as commissioner. Late last year, the OfS ran a recruitment campaign for individual commissioners, and invited organisations to apply to host the commission. In February, the six commissioners were formally appointed, including two student voice commissioners. Advance HE was appointed to host the commission.

The DSC quickly adapted in response to the pandemic by working with practitioners, students, and sector leaders through a series of roundtables to understand the specific challenges for disabled students. This work was published in July in a booklet, 'Three months to make a difference'. Included in this booklet was a request, which we have accepted, that the OfS consider providers' responses to the commission's recommendations in our access and participation plan monitoring for 2019-20.¹⁰

postgraduate students, to offer advice to students and providers. We also published a number of case studies about what universities and colleges were doing to support minority ethnic and LGBT+ students.¹¹

Our approach to access and participation during this time focused on giving providers the time and resources to protect their

5. Supporting all students to succeed

most vulnerable students. We suspended routine monitoring activity of 2018-19 access agreements and 2019-20 access and participation plans, while making clear our expectations that the commitments in the plans should continue to be met. In particular, financial commitments made to current and future students in these plans could provide vital support to vulnerable students.

We allowed universities and colleges some flexibility in using Uni Connect funds they had committed to activity affected by the closure of schools, including using them to address the hardship and mental health needs of disabled students. Providers are also able to use their student and disabled student premiums to boost mental health support and hardship funds, and use formula capital funding to secure remote IT access for students. We helped set up Student Space, to support students in managing their mental health during the pandemic.

Renewing access and participation

With universities and colleges having put in place responses to limit the spread of coronavirus, we are returning to our usual regulation of access and participation. This will allow the OfS to assess properly how providers have sought to meet their commitments. We will, however, acknowledge the circumstances when assessing whether a provider has made reasonable decisions that take into account the needs of students, especially those in underrepresented groups.

In January 2020, we outlined the commitments agreed through our new approach.¹² We require every university and college that wants to charge fees up to the higher limit to submit a plan setting out how it will improve equality of opportunity for underrepresented groups to access, succeed in and progress from higher education. These plans must include:

- the provider's ambition for change
- what it intends to do to achieve that change
- the targets it has set
- the investment it will make to deliver the plan
- how it will evaluate whether the actions in the plan are effective.

Over the last year, we have assessed more than 200 access and participation plans. When assessing these plans, our primary concern is to promote the interests of the most disadvantaged students. Unlike the other regulatory conditions, the baseline requirement for access and participation requires continuous improvement, which relates both to the outcomes achieved and the practice underpinning those outcomes. We monitor each year the delivery of the commitments and targets within plans, including through feedback from students. We are empowered to take action if providers are not taking all reasonable steps to meet their commitments. To help providers with this, we support and promote effective practice, and stimulate collaboration and the sharing of evaluation findings through dedicated OfS access and participation funding.

Funding for access and participation

Funding is a core part of the OfS's work. It helps us to meet our regulatory objectives by driving improvements in student access, experience and outcomes. Student premium funding contributes towards the aims and objectives set out in providers' access and participation plans or statements.

For the academic year 2019-20 we have provided funding totalling £332 million for access and participation activity in providers across England, as follows:

- £60 million for the Uni Connect programme
- £40 million for the disabled students premium

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- £71 million for the premium to support successful student outcomes for part-time undergraduates
- £161 million for the premium to support successful student outcomes for full-time undergraduates.

We are reviewing our future approach, including in relation to the disabled students premium, where we are taking advice from the Disabled Students' Commission. We expect to consult on our approach to recurrent funding over the coming year.

Regulating for risk and reducing burden in access and participation plans

The OfS has been clear that provision that presents low risk to students will be subject to less regulatory burden, while less secure elements of provision will face greater regulatory scrutiny.¹³ This approach gives universities and colleges greater freedom to concentrate on delivering activities that make a real difference to students.

Alongside this approach, we have approved plans for a longer period, up to five years in most cases, rather than the previous annual approach. In making this change, we expected that providers would develop more strategic approaches, and that their plans would therefore contain less detail about specific interventions, and focus more on the outcomes they were trying to achieve. As plans were concerned with the whole student lifecycle, we expected these strategies to involve all parts of the institution, bringing outreach and admissions teams together with colleagues working on student services, learning and teaching, and careers.

What universities and colleges have promised

In their access and participation plans, universities and colleges detail their plans to deal with persistent disparities. Some smaller groups are still critically

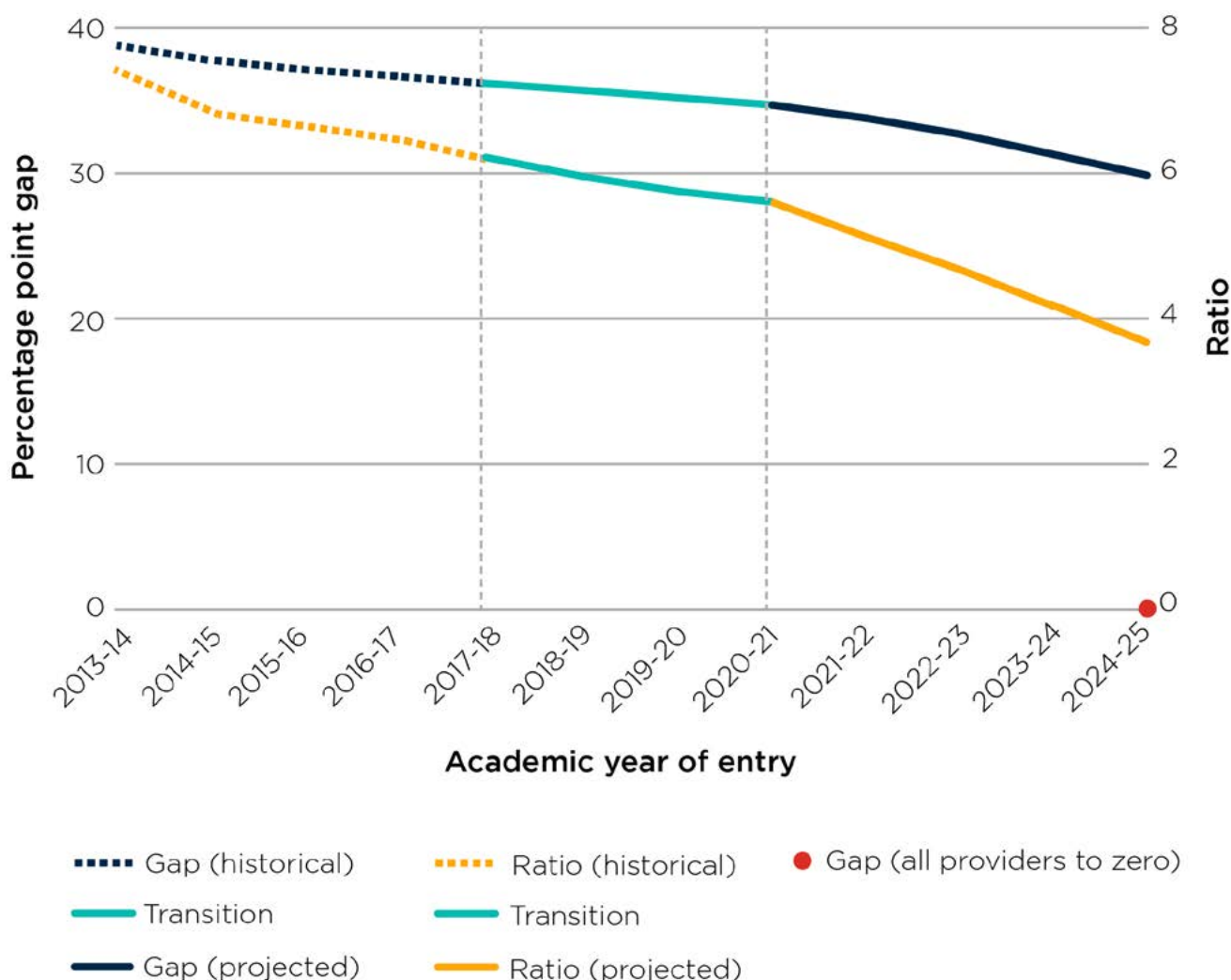
underrepresented in higher education – for example, care leavers, people estranged from their families, young people from military families, and people from Gypsy, Roma and Traveller communities. Better understanding is needed of the specific and complex barriers students from these groups can face in accessing and succeeding in higher education. The plans also set out how providers are tackling problems such as degree attainment gaps between black and white students, and disabled and non-disabled students.

One of the OfS's aims is to eliminate the gap in entry rates at high-tariff universities and colleges between the students in the most represented areas and those in the least represented areas (based on Participation of Local Areas (POLAR) quintiles 5 and 1 respectively) by 2038-39.¹⁴ Currently, those in the most represented areas are four times more likely to study at a high-tariff provider than those in the least.¹⁵

Of the 31 providers classified as high-tariff, 30 included targets relating to this key performance measure (KPM2). The remaining provider has made a commitment to establish a target related to KPM2 during the academic year 2020-21. As shown in Figure 3, if all the universities and colleges with targets in this area meet them, the ratio between the most and least represented groups will reduce from 6.2:1 in 2017-18 to 3.7:1 by 2024-25.¹⁶ This would mean around 6,500 more students from the most educationally disadvantaged areas entering high-tariff providers in 2024-25.¹⁷

To achieve their targets, these universities have committed to a range of measures including contextual offers, attainment-raising activity with schools and colleges, and foundation programmes. We welcome the ambition the plans demonstrate, and will monitor them to ensure this ambition is being realised.

Figure 3: Historical and projected gap and ratio for access to high-tariff providers between POLAR4 quintile 1 and quintile 5 entrants (KPM2)



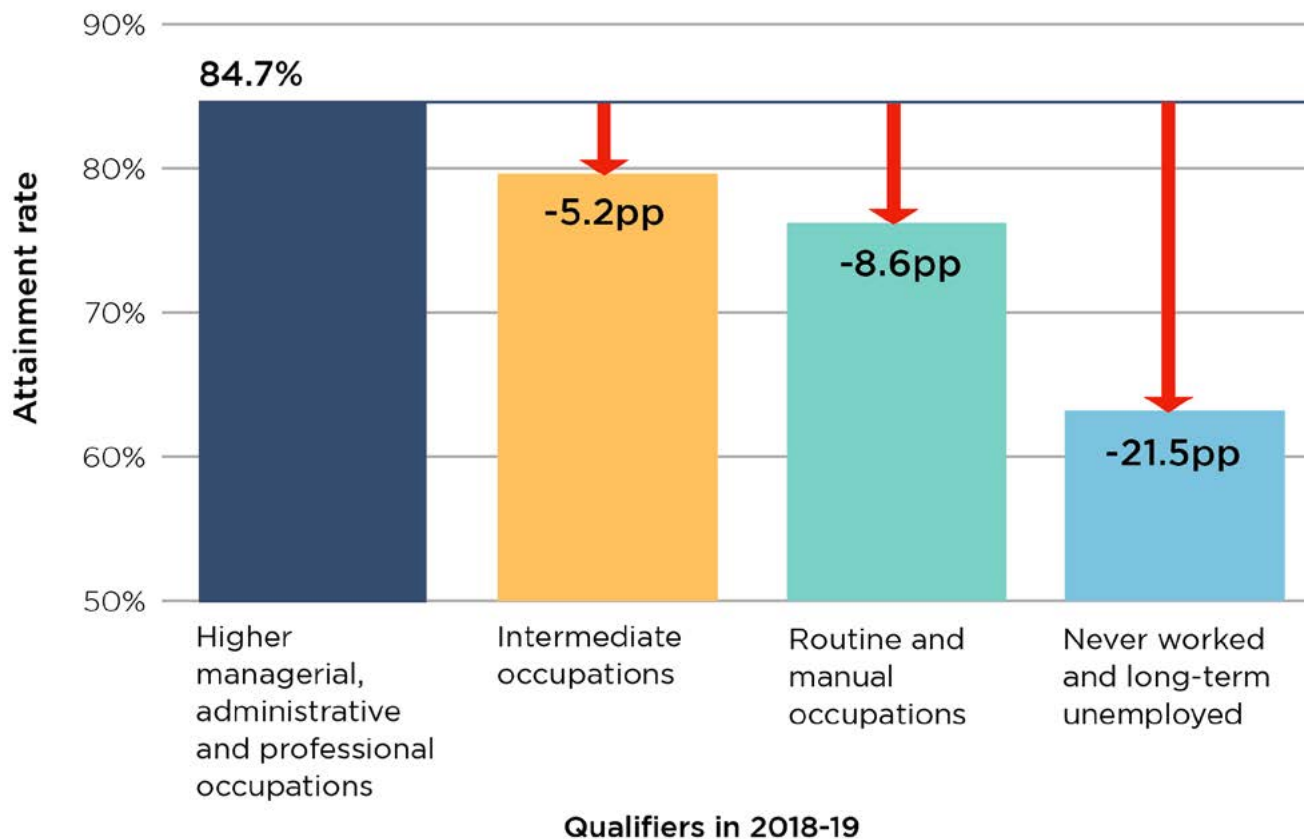
Persistent gaps in student outcomes

There are substantial differences in degree attainment rates for certain groups of students. One of the most pressing is the black attainment gap. The attainment rate for black students in 2018-19 was 22.1 percentage points lower than white students. This gap has begun to narrow, down 4.9 percentage points from 2010-11.¹⁸ OfS analysis of access and participation plans indicates that, if progress is maintained, we could see equality in degree awarding rates between white and black students by the end of the decade.¹⁹

Earlier this year the OfS released an ad hoc experimental analysis on differences in outcomes by student characteristics that we do not routinely publish.²⁰ This experimental data suggests there are stark differences in higher education outcomes for certain groups of students. For example, this analysis found that in 2018-19, students who were eligible to receive free meals when they were at school had a lower rate of achieving a first or upper-second class degree than students who were not eligible. There was an attainment gap of 13.0 percentage points between the two groups.²¹

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Figure 4: The differences in rates of achieving a first or upper second class degree by NS-SEC for full-time, UK-domiciled, first degree students and those on undergraduate courses with postgraduate components

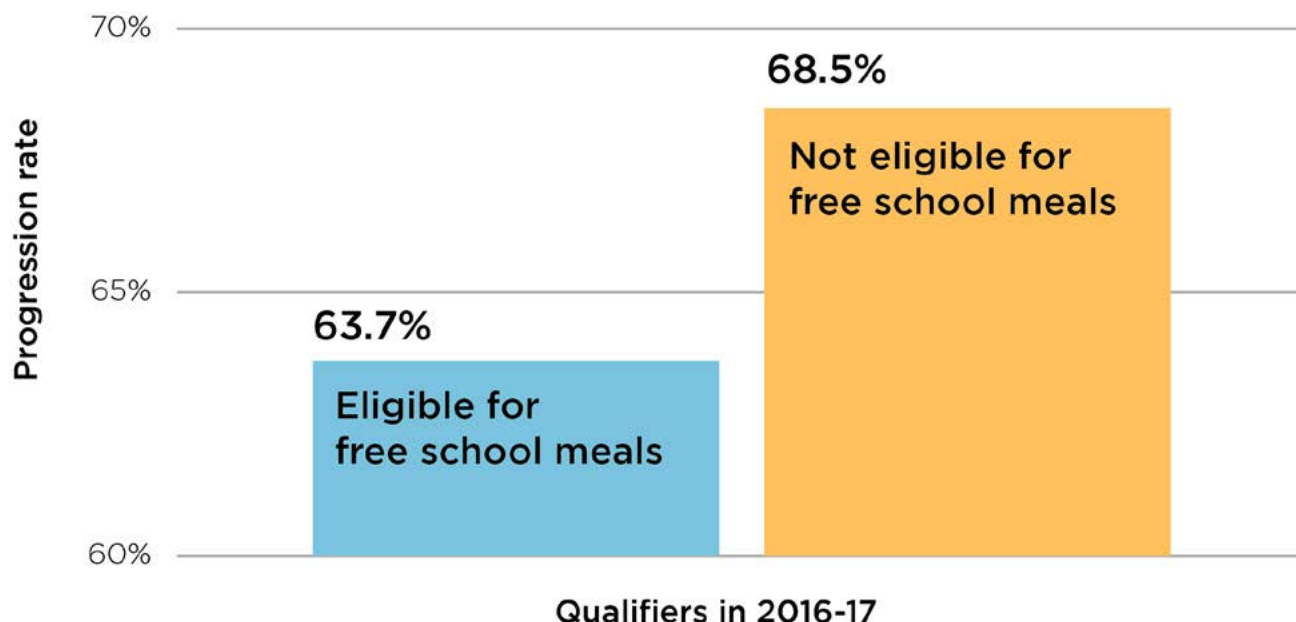


We also sought to understand class dynamics by looking at socioeconomic differences. The rate at which students achieve a first or upper second class degree reduces with socioeconomic classification (NS-SEC) (see Figure 4). Students from intermediate, manual and unemployed backgrounds all have lower attainment rates than students from higher managerial, administrative and professional backgrounds. In 2018-19, the attainment rate of students from an intermediate background was 5.2 percentage points lower than students from a higher managerial, administrative and professional background. The attainment rate of students from a manual background was 8.6 percentage points lower than students from a higher managerial, administrative and professional

background. Students from an unemployed background had an attainment rate 21.5 percentage points lower than students from a higher managerial, administrative and professional background.

Nor are all graduates equally likely to gain highly skilled employment. Recent analysis by the OfS suggests that in 2016-17, for England-domiciled, undergraduate qualifiers there was a 4.8 percentage point gap between students who were eligible for free school meals and those who were not going on to highly skilled employment or further study at a higher level (see Figure 5).²² These inequalities point to the need for universities and colleges to tailor careers support for students differently, depending on their backgrounds and characteristics.

Figure 5: The difference in students progressing to highly skilled employment or further study at higher level by free school meal eligibility for full-time England-domiciled undergraduate qualifiers



Student mental health

The mental health and wellbeing of students during the pandemic have been a central concern for providers and the OfS. Like other subsections of the population, some students experienced bereavement, serious illness or other traumatic events, which triggered anxiety, depression or a condition such as post-traumatic stress disorder.²³ Different student groups were, and will continue to be, impacted in different ways.

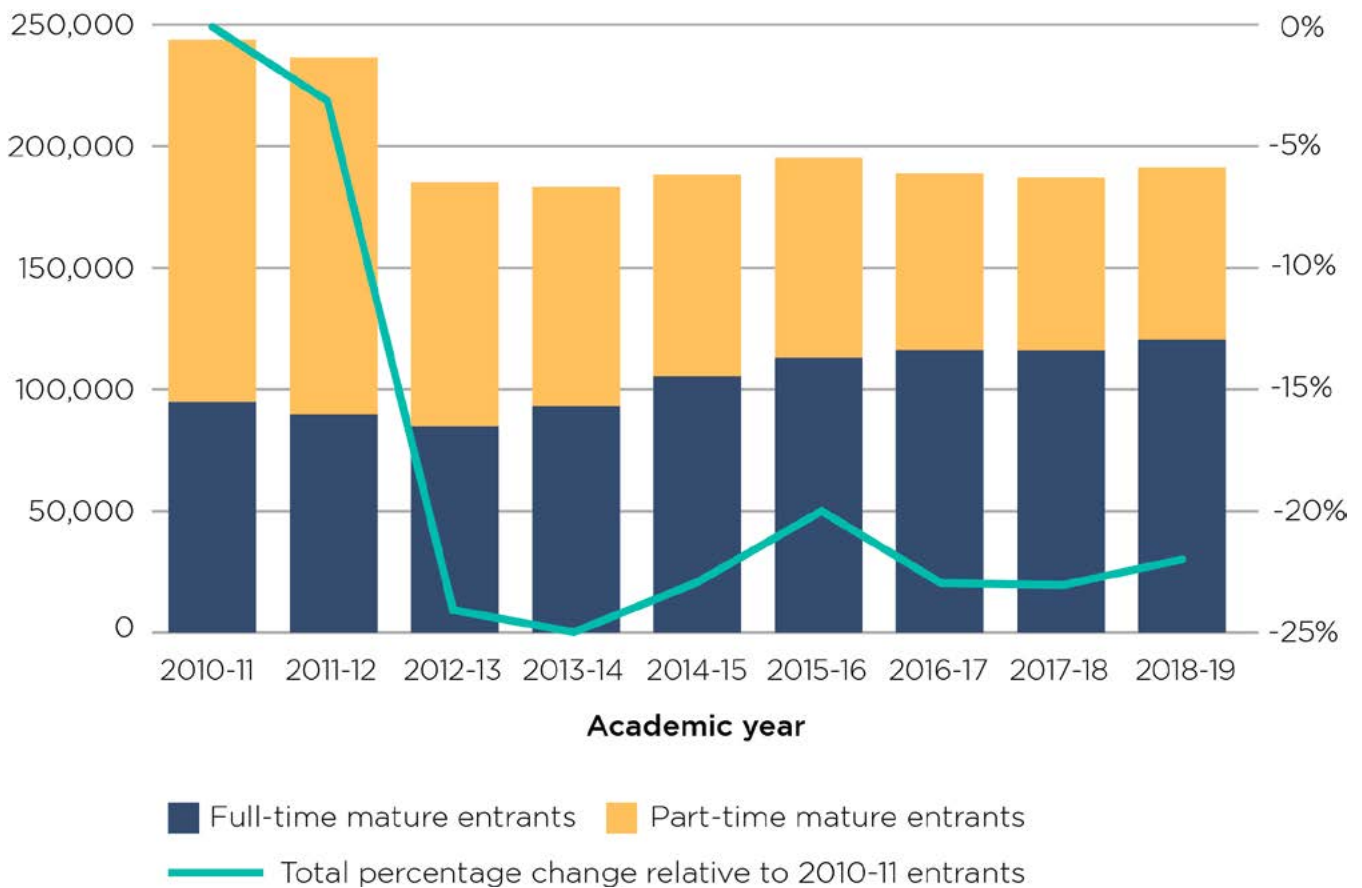
In regulatory guidance published in April 2020 we noted that during this period ‘all students are likely to require increased pastoral support and resources to support their wellbeing,’ and made clear our expectation that universities and colleges should take ‘reasonable steps to put in place equivalent alternative arrangements for such support for all students’.²⁴

Student Space

In addition to the funding flexibilities described at the start of this chapter, we have funded Student Space, a programme run by Student Minds, available from July 2020.²⁵ It is supported by up to £3 million in funding awarded by the OfS. The programme is designed to complement the mental health support already in place through universities, colleges and NHS services in England and Wales – filling potential gaps in provision and ensuring that all students have access to support they need. Providing both preventative support and immediate interventions, Student Space will aim to limit the mental health impact of the pandemic on students and deliver support where it is most needed – for example, for those experiencing distress or trauma. In 2020-21, we plan to conduct a survey on graduate wellbeing.

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Figure 6: Number of mature undergraduate entrants to English higher education providers²⁶



Population: UK-domiciled entrants to undergraduate provision at English higher education providers who are 21 or over.

Mature students and lifelong learning

There has been a significant decline in the number of mature learners entering higher education over the past nine years. While the number of mature students studying full-time has remained largely stable, the number of those studying part-time more than halved between 2010-11 and 2018-19 (see Figure 6).²⁷ Over that time, the mature student population has switched from being roughly 40:60 full-time to part-time students in 2010-11, to being around 60:40 in 2018-19. This suggests that fewer people have access to lifelong learning (especially while also working) and a second chance at entering higher education.

The OfS's analysis of access and participation plans has shown that mature students have not been prioritised by many providers, despite low and falling proportions of such students in their own populations and in higher education at large. This suggests that universities and colleges will have to be more proactive, for example by including more flexible study opportunities, to achieve equality in participation rates within a generation. Mature students are not a homogeneous group and will often have more complex needs than 18-year-olds coming straight from school. They are more likely to have caring responsibilities, come from lower socioeconomic backgrounds, be disabled, or be from black or minority ethnic groups.²⁸

5. Supporting all students to succeed

They are also more likely to react to negative financial pressures (such as the prospect of repaying tuition fees, or economic recession) by deciding not to enter higher education.

With the deleterious impact of the pandemic on the economy, this issue is of paramount importance. There will be an increasing demand for adult retraining in an environment where many will be unemployed and need to pursue different career options. After the pandemic, regional economies could look very different: mature students could form the backbone of local economic recovery. As we engage with providers to get their access and participation plans back on track, we will want to consider the support for mature students and their progression through local routes such as further education colleges. This focus on local graduates is expected to be a priority for our funding review.

Harassment and sexual misconduct

Harassment and sexual misconduct remain persistent problems at universities and colleges. Students are more likely than any other group to be sexually assaulted.²⁹ In a recent study of over 6,000 students, nearly 50 per cent of women said they had been touched inappropriately.³⁰ Research from 2017 showed that 26 per cent of Jewish students were very or fairly worried about being subject to verbal abuse, physical attack, vandalism, property damage or theft because of their religious beliefs.³¹ A study from 2018 showed that one in three Muslim students have experienced some type of abuse or crime where they study.³²

In October 2019, a survey commissioned by the Equality and Human Rights Commission revealed that just under a quarter of ethnic minority student respondents had experienced racial harassment since starting their course. Most did not report it to their university.³³ This year, reports of harassment and hate crimes directed towards students

have continued. Rising 'anti-Asian-looking' sentiment has affected international students.³⁴ Students involved in Black Lives Matters protests have highlighted the racism they have experienced in higher education.³⁵ In a letter to international students published in April 2020, Minister of State for Universities Michelle Donelan MP said 'There is no place in our society – including within higher education – for harassment, discrimination or racism,' and that the government is working with universities and colleges to ensure they are doing all they can to prevent it.³⁶

In January 2020, the OfS launched a consultation on our expectations about how universities and colleges should prevent and respond to incidents of harassment. This consultation was paused following the coronavirus outbreak, but we expect to return to this as soon as possible in the new year.

We also want students to know how they can report incidents at their university or college, and to feel confident that when they do their complaints will be addressed. Universities UK has recently developed guidance targeted at addressing racial harassment. This includes recommendations to help universities and colleges improve their practice, and reflects students' views on what is required.³⁷

2021 actions

In the coming year we will:

- Develop further regulatory and funding incentives for mature student participation.
- Continue collaborating with Uni Connect programmes to build on innovative delivery during the pandemic to support diverse pathways for students applying next year and beyond, including local progression from further education colleges.
- Work with Student Minds to mitigate the mental health effects of the pandemic.

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- Relaunch the consultation on how universities and colleges should prevent and respond to incidents of harassment.
- Deepen our understanding of student populations, including the intersections between different groups, through the access and participation dataset and a new Associations Between Characteristics measure.
- Track student progress from outreach through to higher education and into employment, through the Higher Education Access Tracker and similar services.
- Develop evaluation practice and the use of evaluation findings through the OfS-funded 'what works' centre, Transforming Access and Student Outcomes in Higher Education.

For the OfS, regulation is a means to the end of better outcomes for all students. Higher education transforms individual lives and produces highly skilled graduates who make key contributions to the economy and wider society. To have maximum social and economic impact, however, our higher education system must be underpinned by the principle and practice of fair and equal opportunity for all. This is the challenge we have set for ourselves and for the sector.

Notes

- 1** OfS, 'Support for disadvantaged students crucial as selective university numbers rise', November 2020 (www.officeforstudents.org.uk/news-blog-and-events/press-and-media/support-for-disadvantaged-students-crucial-as-selective-university-numbers-rise/).
- 2** OfS, 'Supporting disadvantaged students through higher education outreach', July 2020 (www.officeforstudents.org.uk/publications/coronavirus-briefing-note-higher-education-outreach/#responding); Sutton Trust, 'School shutdown', April 2020 (available at <https://www.suttontrust.com/our-research/covid-19-and-social-mobility-impact-brief/>).
- 3** OfS, 'Disabled students', June 2020 (www.officeforstudents.org.uk/publications/coronavirus-briefing-note-disabled-students/#impact).
- 4** OfS, 'Supporting student mental health', April 2020 (www.officeforstudents.org.uk/publications/coronavirus-briefing-note-supporting-student-mental-health/).
- 5** OfS, "Digital poverty" risks leaving students behind', September 2020 (www.officeforstudents.org.uk/news-blog-and-events/press-and-media/digital-poverty-risks-leaving-students-behind/).
- 6** OfS, 'Regulatory requirements during the coronavirus (COVID-19) pandemic', March 2020 (available at www.officeforstudents.org.uk/publications/regulatory-requirements-during-the-coronavirus-covid-19-pandemic/), p2.
- 7** OfS, 'Supporting black, Asian and minority ethnic students', July 2020 (www.officeforstudents.org.uk/advice-and-guidance/coronavirus/case-studies/black-asian-and-minority-ethnic-students/).
- 8** OfS, 'Students without family support', May 2020 (www.officeforstudents.org.uk/publications/coronavirus-briefing-note-students-without-family-support/).
- 9** There is evidence that trans and non-binary students may be particularly impacted. OfS, 'Supporting LGBT+ students', July 2020 (www.officeforstudents.org.uk/advice-and-guidance/coronavirus/coronavirus-case-studies/lgbtplus-students/).
- 10** Disabled Students' Commission, 'Three months to make a difference', July 2020 (available at <https://www.advance-he.ac.uk/guidance/equality-diversity-and-inclusion/creating-inclusive-environment/disabled-people/disabled-students-commission>).
- 11** OfS, 'Case studies and resources' (www.officeforstudents.org.uk/advice-and-guidance/coronavirus/coronavirus-case-studies/); OfS, 'Briefing notes' (www.officeforstudents.org.uk/advice-and-guidance/coronavirus/briefing-notes/).
- 12** OfS, 'Transforming opportunity in higher education', January 2020 (available at www.officeforstudents.org.uk/publications/transforming-opportunity-in-higher-education/).
- 13** OfS, 'Securing student success: Regulatory framework for higher education in England', February 2018 (available at www.officeforstudents.org.uk/publications/securing-student-success-regulatory-framework-for-higher-education-in-england/), p15.
- 14** The POLAR classification groups areas across the UK based on the proportion of young people who participate in higher education. It looks at how likely young

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people are to participate in higher education across the UK, and shows how this varies by area. POLAR classifies local areas into five groups, or 'quintiles', based on the proportion of young people who enter higher education aged 18 or 19. Quintile 1 shows the lowest rate of participation; quintile 5 shows the highest. For more information see www.officeforstudents.org.uk/data-and-analysis/young-participation-by-area/about-polar-and-adult-he/.

- 15** OfS, 'Official statistic: Key performance measure 2' (www.officeforstudents.org.uk/about/measures-of-our-success/participation-performance-measures/gap-in-participation-at-higher-tariff-providers-between-the-most-and-least-represented-groups/).
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5. Supporting all students to succeed

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- 34** OfS, 'Supporting international students', May 2020 (www.officeforstudents.org.uk/publications/coronavirus-briefing-note-supporting-international-students/#harassment).
- 35** Anna Fazackerley, 'It's not banter, it's racism: UK students accuse universities of brushing complaints aside', The Guardian, 7 July 2020 (<https://www.theguardian.com/education/2020/jul/07/its-not-banter-its-racism-uk-students-accuse-universities-of-brushing-complaints-aside>).
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6. Graduate skills and prospects in the pandemic

For the clear majority of students, having a degree ensures higher salaries, greater job security and less likelihood of unemployment. In 2019, the median salary of working-age graduates was £34,000, £9,000 more than the median non-graduate salary. Nearly two-thirds of graduates were in highly skilled employment, as against 23.9 per cent of non-graduates.¹

Current graduate employment prospects are extremely uncertain. The coronavirus pandemic and lockdowns have resulted in a severe economic contraction. Many businesses have gone into administration and many more have instigated a hiring freeze. The impact is likely to be geographically uneven and long-lasting.

The OfS supports universities and colleges to provide opportunities that develop the types of skills that will enable graduates to gain meaningful employment throughout their working lives. This chapter explores the pandemic's potential effect on the economy, its likely impact on final year students and recent graduates, and how university and college careers services are responding. It examines a number of the more persistent attainment and employment gaps for certain groups of graduates, and looks at how the OfS and the government are helping to fill skills gaps.

Current issues for recent graduates

The economy

It is too early to say how adversely the pandemic will affect the economy, or assess the extent of any resulting economic scarring. There is no consensus about how the economy might recover, and there may be longer-term repercussions for students looking to start their careers.² The number of students undertaking postgraduate degrees is growing and is likely to be buoyant this year as students look to upskill during the pandemic.

The impact on graduate employment is so far fairly uncertain. Research from the Sutton Trust has shown that while 33 per cent of graduate employers surveyed said they were going to hire fewer graduates, and 6 per cent said no graduates, 27 per cent said they would hire more.³ A survey conducted by Prospects in May found that, of over 1,200 final year students who responded, 26 per cent had lost their work placement or internship, 29 per cent had lost their job, and 28 per cent had had a job offer deferred or cancelled.⁴

Apprentices appear to be especially affected by the pandemic, and many have concerns about what this might mean for their job prospects. Employers surveyed by the Sutton Trust in early April reported that on average just 39 per cent of apprenticeships were continuing as normal. Over a third of apprentices (36 per cent) had been furloughed and 8 per cent made redundant. 17 per cent of apprentices had had their off-the-job learning suspended.⁵

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Some industries have been more affected than others by lockdowns. These include the leisure, transport and retail sectors. A Resolution Foundation report showed that, before the pandemic, one in five graduates worked in these sectors one year after graduating.⁶

Ensuring there are enough graduates for public services is an important part of our work. This includes careers in health and medicine, where numbers of students are expected to increase this year and beyond.

Careers services

During spring and summer 2020, many universities, colleges and employers adapted quickly to continue to support graduates. Careers services vary across the sector, but most students will be able to access a service to help them consider their options and prepare to go into employment after their studies.

Universities and colleges typically offer a wide range of career support services, from CV-writing to networking events. The Association of Graduate Careers Advisory Services has highlighted how the need to respond rapidly to the challenges thrown up by the pandemic has led to greater use of vlogs, podcasts, online chats and live streams to deliver support to students and graduates.⁷ University and college employment support staff are increasingly linking up with academic staff and employers to provide a more holistic service for students. Many universities and colleges have faced challenges in delivering their services online and understanding how they can be adapted to meet students' needs.

There were concerns that the move to online delivery of careers advice during the outbreak would present barriers for students who might not, for a number of reasons, be able to participate in activities intended to help them into the workplace. For example, students with particular

impairments may have found the change challenging, as well as those with additional caring responsibilities resulting from school closures or the need to look after relatives.

Disabled students may have additional concerns about the extent to which employers will make reasonable adjustments during the pandemic, and whether more permanent changes to working practices in its aftermath may adversely affect their working lives. Some university and college career services offer webinars tailored to the needs of disabled students – for example, on how to ask for reasonable adjustments, and job-hunting advice for students with specific impairments. To help disabled students with their move into the workplace, some university and college employment services are giving advice about what support they are entitled to expect from an employer, encouraging employers and recruiters to offer guaranteed interviews to disabled students, and offering support to employers to design appropriate reasonable adjustments for students who may be vulnerable during lockdown.

Many of the immediate challenges faced by universities and colleges during the pandemic have been technical, requiring them to swiftly shift to providing services remotely. As the extent of the economic damage becomes clearer, the next challenge is likely to be strategic – the need to adapt medium- to long-term provision amid uncertainties about funding, the economy and students' abilities to secure jobs after their studies.

Local graduates

Some students enter higher education precisely because it allows geographical mobility.⁸ Graduates who are more mobile can earn more.⁹ Even so, looking at graduates who were under 21 when they started their course, 42.1 per cent of those in work were employed in their home area.¹⁰

6. Graduate skills and prospects in the pandemic

The impact of the pandemic is likely to be geographically uneven. Before the pandemic, many graduate jobs were concentrated in cities. A report from Centre for Cities found that London, Birmingham, Manchester and Leeds accounted for 34.7 per cent of all employment for 2014 and 2015 graduates from UK universities.¹¹ There has been some suggestion that the pandemic might rebalance graduate employment away from major cities as more people work from home, but this remains to be seen.¹²

To help effect change, the OfS has invested £5.6 million in funding to help create more opportunities for graduates who seek highly skilled employment in their home region. These include curriculum interventions and internships. We continue to evaluate and share emerging practice on our local graduate webpages.¹³

Addressing skills gaps

Our work on skills focuses on encouraging the development of a 'pipeline' of graduate talent to meet the needs of employers and the economy. This includes promoting higher education provision in subject areas with identified skills shortages. Over the past couple of years we have been working with government and health bodies to strengthen and diversify the flow of entrants to courses in small and specialist health disciplines such as therapeutic radiography, podiatry, orthoptics, prosthetics and orthotics.¹⁴ This year we commissioned research on why relatively few men study nursing, to help increase the numbers who enter the profession.¹⁵

During the pandemic, we have been working with the Department for Health and Social Care and Health Education England to develop a comprehensive programme to increase the number of nurses qualifying and entering the NHS. We published FAQs to support student nurses and medics in the early stages of the pandemic, working with relevant health bodies and regulators to

ensure students were informed about their choices.¹⁶ We have monitored application numbers to healthcare programmes and noted marked increases across all medical professions as a result of the recent health crisis. We have been engaging with the devolved nations about the impact of the pandemic on the future supply of doctors, nurses and other health professionals, alongside providing funding to support a temporary increase to the number of medical students accepted this year.

Throughout the year, we have been working to strengthen and diversify the skills pipeline for artificial intelligence (AI) applications. In June 2019 the government announced a package of support for the development of postgraduate conversion courses in AI and data science technologies, to help address the shortage of AI and data specialists in the UK. These shortages have been estimated to cost businesses more than £2 billion a year.¹⁷ The OfS has distributed funding to 29 universities offering AI and data science conversion courses, to help fill this gap. The funding can be used to support specialist teaching and work placements.

Women, disabled people and black people are significantly underrepresented in data science and related fields. In 2018-19, for example, only 18.5 per cent of all students enrolled on a computer science degree were women.¹⁸ Conversion courses can help to fix the so-called 'leaky pipeline' whereby women are less likely to take science A-levels and even less likely to take science undergraduate degrees. A significant part of the funding is supporting scholarships to encourage women and students from other underrepresented groups to apply for these courses.

2021 actions

To help universities and colleges through the next stage of the pandemic, and ensure that students have the best possible chance of gaining highly skilled employment, we will:

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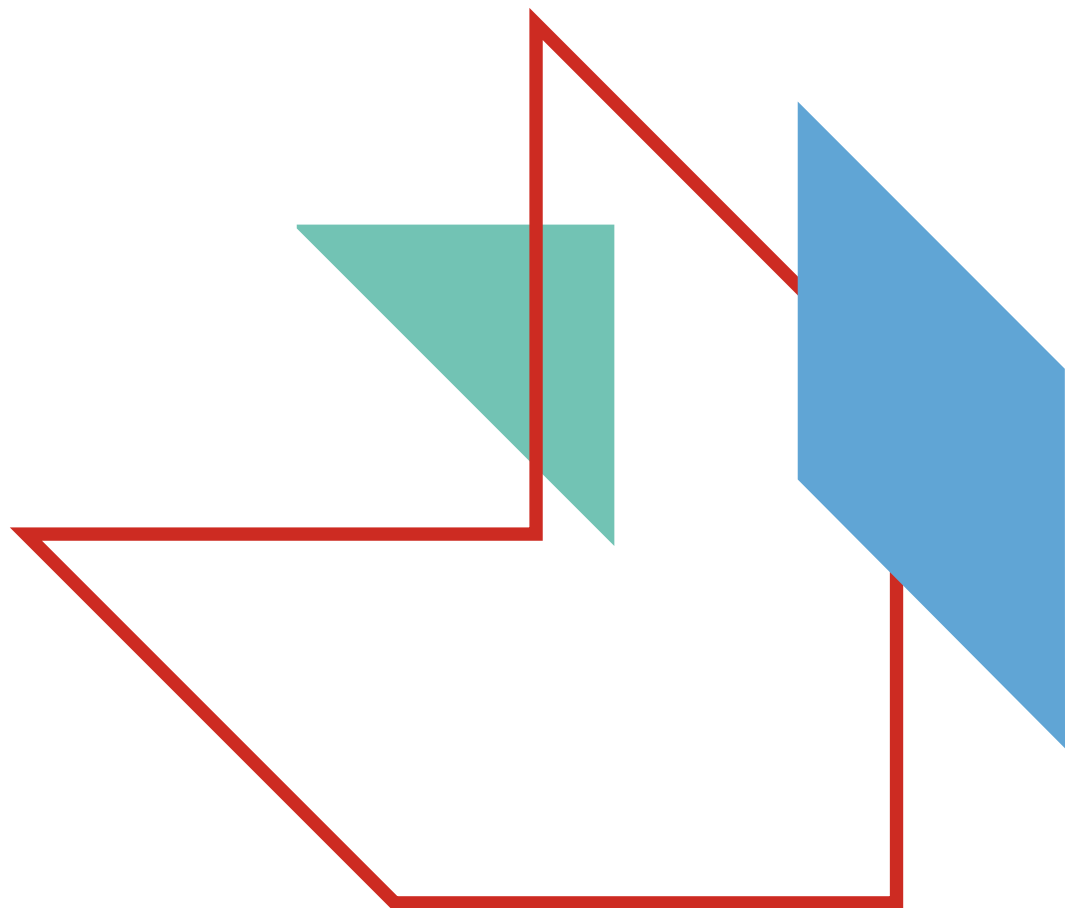
- Evaluate the support for local graduates through our funding, working with further education colleges and universities.
- Ensure universities and colleges are closing attainment gaps and securing equitable graduate outcomes.
- Continue to fund courses that provide graduates for industries, such as certain science, technology, engineering and maths subjects, and health and medical subjects.



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- 16 OfS 'Healthcare students' (officeforstudents.org.uk/for-students/student-guide-to-coronavirus/student-faq/).
- 17 OfS, 'Study artificial intelligence and data science as a postgraduate' (www.officeforstudents.org.uk/for-students/study-artificial-intelligence-and-data-science-as-a-postgraduate/).
- 18 Higher Education Statistics Agency, 'What do HE students study?' (<https://www.hesa.ac.uk/data-and-analysis/students/what-study>).



Selected OfS publications, January to November 2020

Note: In addition to the following, we published letters and guidance to providers in response to the coronavirus pandemic, which are collected on our [‘Coronavirus publications’](#) page.

[‘Consultation on harassment and sexual misconduct in higher education’](#), 9 January.

[‘Regulatory advice 8: Guidance for providers about condition of registration F1 – Transparency information’](#), 10 January (OfS 2020.02).

[‘Consultation on implementing savings in academic years 2019-20 and 2020-21’](#), 17 January (OfS 2020.03).

[‘Transforming opportunity in higher education’](#), 29 January (OfS 2020.06).

[‘Prevent review meetings: 2019 programme findings’](#), 6 February (OfS 2020.19).

[‘Students: Experts in their own experience’](#), 13 February.

[‘The National Student Survey: Consistency, controversy and change’](#), 19 February (OfS Insight brief #6).

[‘Consultation on the higher education admissions system in England’](#), 27 February (OfS 2020.12).

[‘Consultation on the Office for Students’ approach to monetary penalties’](#), 3 March (OfS 2020.13).

[‘Formula capital funding for 2020-21’](#), 27 March (OfS 2020.17).

[‘Student accommodation’](#), 22 April (Coronavirus briefing note #1).

[‘Supporting student mental health’](#), 30 April (Coronavirus briefing note #2).

[‘Consultation on the integrity and stability of the English higher education sector’](#), 4 May (OfS 2020.20).

[‘Regulatory notice 1: Access and participation plan guidance’](#), 5 May (OfS 2020.25).

[‘Funding for 2019-20 and 2020-21: OfS board decisions and outcomes of consultation’](#), 6 May (OfS 2020.21).

[‘Terms and conditions of funding for 2020-21’](#), 6 May (OfS 2020.22).

[‘Guide to funding 2020-21: How the Office for Students allocates money to higher education providers’](#), 13 May (OfS 2020.23).

[‘Recurrent funding for 2020-21’](#), 13 May (OfS 2020.24).

[‘Analysis of Level 6 and 7 apprenticeships’](#), 13 May (OfS 2020.28).

[‘Students without family support’](#), 4 May (Coronavirus briefing note #3).

[‘Supporting international students’](#), 21 May (Coronavirus briefing note #4).

[‘Differences in student outcomes: further characteristics’](#), 4 June (OfS 2020.30).

[‘Information, advice and guidance for prospective students’](#), 10 June (Coronavirus briefing note #5).

[‘Postgraduate research students’](#), 11 June (Coronavirus briefing note #6).

[‘Graduate students: Getting into employment’](#), 18 June (Coronavirus briefing note #7).

[‘Disabled students’](#), 25 June (Coronavirus briefing note #8).

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[‘Regulatory notice 5: Condition Z3 – Temporary provisions for sector stability and integrity’](#), 3 July (OfS 2020.33).

[‘Consultation on the integrity and stability of the English higher education sector: Analysis of responses and equality impact assessment’](#), 3 July (OfS 2020.34).

[‘Supporting disadvantaged students through higher education outreach’](#), 9 July (Coronavirus briefing note #9).

[‘National Student Survey 2020: Analysis of the impact of the coronavirus pandemic’](#), 15 July (OfS 2020.37).

[‘Consultation on student protection directions’](#), 17 July (OfS 2020.35).

[‘Digital teaching and learning in English higher education during the coronavirus pandemic: Call for evidence’](#), 3 September (OfS 2020.39).

[‘Regulatory advice 14: Guidance for providers for the financial monitoring returns’](#), 9 September (OfS 2020.40).

[‘Medical and dental students survey 2020’](#), 24 September (OfS 2020.43).

[‘Funding competition: Using innovation and intersectional approaches to target mental health support for students’](#), 1 October (OfS 2020.14).

[‘A matter of principles: Regulating in the student interest’](#), 6 October (OfS Insight brief #7).

[‘Higher Education Students Early Statistics survey 2020-21 \(HESES20\): Guidance for providers’](#), 9 October (OfS 2020.42).

[‘Additional recurrent and capital funding for 2020-21 and monitoring of medical and dental intake targets: Consultation and invitation to bid for capital’](#), 15 October (OfS 2020.45).

[‘Funding competition to improve access and participation for black, Asian and minority ethnic groups in postgraduate research study’](#), 22 October (OfS 2020.16).

[‘Postgraduate research students at high-tariff providers’](#), 22 October (OfS 2020.46).

[‘The National Student Survey 2021’](#), 26 October (OfS 2020.47).

[‘Business plan: October 2020 to March 2021’](#), 29 October (OfS 2020.48).

[‘Consultation on regulating quality and standards in higher education’](#), 17 November (OfS 2020.50).

[‘Analysis of degree classifications over time – changes in graduate attainment from 2010-11 to 2018-19’](#), 29 November (OfS 2020.52).

