Annex H: Guidance for completing a summary of an approved access and participation plan

Introduction

1. The access and participation plan summary aims to show students, parents and others a provider's commitment to support equality of opportunity. This means it should be accessible, clear and accurate. The summary should only reflect content that has been approved as part of an access and participation plan.

2. The summary should not be badged as OfS-approved without explicit permission from the Office for Students (OfS). This is because we may not always check the content of the summaries before they are published given that they will be submitted within 28 days of a provider receiving approval of a plan.

3. Where the summary relates to commitments to students, providers should have due regard to consumer protection legislation.

4. We may review and ask a provider to make changes to a summary if we find that the guidance above in paragraphs 1-3 has not been followed.

5. The plan summary template at Annex I sets out the areas that we expect a provider to cover in its plan summary.[1] A provider may use this template to present its plan summary or it may choose to produce its plan summary in a different format or medium. A provider should ensure that its plan summary meets the requirements on being accessible set out in Regulatory notice 1.[2]

6. A provider can produce more than one plan summary where it considers that this would be beneficial to its students.

7. As set out in Regulatory notice 1, the plan summary does not need to be submitted to the OfS at the same time as the plan. A provider is expected to produce the summary once a plan has been approved. A provider should publish the summary alongside its approved access and participation plan and submit a link to the OfS (via app@officeforstudents.org.uk) within 28 days of receiving confirmation that its plan has been approved.

Contents of the summary

8. A provider should include information regarding each of the areas below in its summary.

9. For each section of the summary, a provider should indicate the relevant page(s) of its approved plan where readers can find more information.

What is an access and participation plan?

10. This can cover what an access and participation plan is and a link to the full plan.

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[1] Available at www.officeforstudents.org.uk/publications/regulatory-advice-6-how-to-prepare-your-access-and-participation-plan-effective-practice-advice/.

[2] See www.officeforstudents.org.uk/publications/regulatory-notice-1-access-and-participation-plan-guidance/.

Key points

11. A provider may want to include the type of provision it offers, its size, geography and make-up of its student body. Contextual information can be drawn on from the access and participation plan and key challenges in the assessment of performance. The main areas a provider is seeking to improve as part of its access and participation can also be included.

Fees charged

12. The maximum fees for both full-time and part-time provision can be included here. An 'inflationary increases' statement may also be included if relevant. A link can also be provided in this section to where readers can find more information, such as a provider's published annual fee information summary document.

Financial help available

13. This section can lay out any financial support available to students and the eligibility criteria. If a provider does not provide any financial support, this can be indicated here.

Information for students

14. How information on fees and financial support is made available to students can be included here. This would include for prospective or current students, prior to them starting their course and for the duration of their course.

What the provider is aiming to achieve

15. A summary of the main focus of the access and participation work can be provided here as well as the groups that will be supported and at what stages of the student lifecycle.

16. The key risks to equality of opportunity and measurable objectives identified in the assessment of performance can also be supplied here. This may include key targets and the timescale in which they are intended to be achieved.

What the provider is doing to address key risks to equality of opportunity

17. This section may include a summary of the intervention strategies and activities a provider will take to achieve the objectives and targets in its access and participation plan.

How students can get involved

18. Details on how students have and will be involved in the planning, monitoring, evaluation and delivery of access and participation work can be included here.

Evaluation – how a provider will measure what it has achieved

19. This could include a high-level overview of:

    a. How a provider will ensure its work is informed by evidence

    b. How a provider plans to evaluate its intervention strategies.

20. This section may also include how a provider intends to record, publish and share the outcomes of its evaluation.

Contact details

21. This would include contact details for readers to get in touch for further information.

22. A provider should provide a link to its full access and participation plan with the plan summary. Where relevant, it should also link to further information on its website for specific groups and initiatives it includes in its summary.

Hints and tips for writing a plan summary

23. Students, parents or others with an interest in equal opportunities may have little or no knowledge of access and participation or the regulations which govern it. The style and tone of the summary should be accessible, clear and simple, and should not assume what the reader will know. In this context we advise the following:

- Sentences – should be short and no more than 25 words.

- Paragraphs – should have no more than three sentences.

- Words – don't use long words where short ones will do.

- Tone – be clear and concise and write in the way you would speak to someone.

- Spelling, grammar and consistency – make sure you check the summary for spelling, grammar, and a consistent style. Ideally, ask an editor to review it.

- Technical terms and acronyms – try to avoid them wherever possible, but if they are needed, make sure you explain them or spell them out.

- Jargon – avoid all jargon and clichés, including terms commonly used in academic and management circles.

- Bureaucracy and governing structures – access and participation plans often refer to committees, groups or other governance structures at a provider. Do not assume that student readers will know what these are. If you need to refer to them, explain what they do.

- Active voice – wherever possible use the active voice ('we used student feedback') rather than passive constructions ('student feedback was used').

- Links – if you are embedding a link in text, make sure the text describes the content of the link ('Read the report on degree outcomes' not 'Read the report here').

- Emphasis – we recommend that you use bold for emphasis, rather then italics, but use it sparingly.

- Accessibility – make sure that your document complies with the Web Content Accessibility Guidelines 2.1.[3] Published PDFs should, for example, include structured headings, alternative text where appropriate, and a title in the document properties.

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[3] See https://www.w3.org/TR/WCAG21/.

Use of acronyms

24. By their nature, acronyms tend to be technical. For this reason, we discourage a provider from using them. If they are needed, spell them out on first mention, but consider whether an explanation of their meaning is needed. We have highlighted some common examples.

Acronym	Our suggestions
APP	We suggest avoiding using 'APP'. Either spell out 'access and participation plan' or refer to 'our plan' or 'the plan'.
BAME	Research by the Race Disparity Unit suggested the acronyms BAME and BME were not well understood. Universities and colleges will have their own style guides, but we encourage providers to refer to specific ethnic groups instead (e.g. 'Black', 'West Indian', 'Chinese', 'Asian').
FEC	Avoid this acronym and avoid the term 'further education college'. Use the term 'college'.
FSM	Spell out that this refers to 'free school meals' and that it is used as a measure of deprivation.
FT	Use 'full-time'.
HEI	We suggest avoiding this acronym and the term 'higher education institution'. Try to use more commonly used terms like 'university', 'college' or 'professional school'.
IMD	As with TUNDRA, don't assume readers will know what this is. Spell out 'Index of Multiple Deprivation' and explain that it measures relative deprivation for small areas.
PG	Use 'postgraduate'.
PT	Use 'part-time'.
TASO	Don't assume that readers will know what TASO is or means. Explain that it is an independent hub for higher education professionals to access research, toolkits and evaluation guidance to eliminate risks to equality of opportunity.
TEF	Explain that the TEF is a national exercise to assess excellence in higher education teaching.
'TUNDRA' or 'TUNDRA quintiles' or 'TUNDRA Q1'	This is a statistical measure to inform access and participation policy. It may not mean very much to a general reader. Explain that it is a measure which classifies local areas into five groups – or quintiles – based on the proportion of young people who enter higher education.
UG	Use 'undergraduate'.

Use of jargon

25. We have drawn out, by way of example, a list of terms and titles which a provider should either avoid or explain in the summary:

- 'Theory of change'

- 'deficit model'

- 'Student Protection Plan'

- 'monitoring provider impact reports'

- 'Programme and Evaluation Design Framework'

- 'Academic Board'

- 'HE Student Engagement Policy'

- 'College Student Council'

- 'Corporation board'

- 'Access and Participation Committee'