TEF Year Three Metrics webinar

1 November 2017

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Introduction

- This webinar is aimed at TEF contacts and others who would like to understand the metrics used in TEF Year Three

- We will cover:
  - What the Year Three metrics are
  - Changes made since TEF Year Two
  - Their use in the assessment
  - The metrics and data available to providers
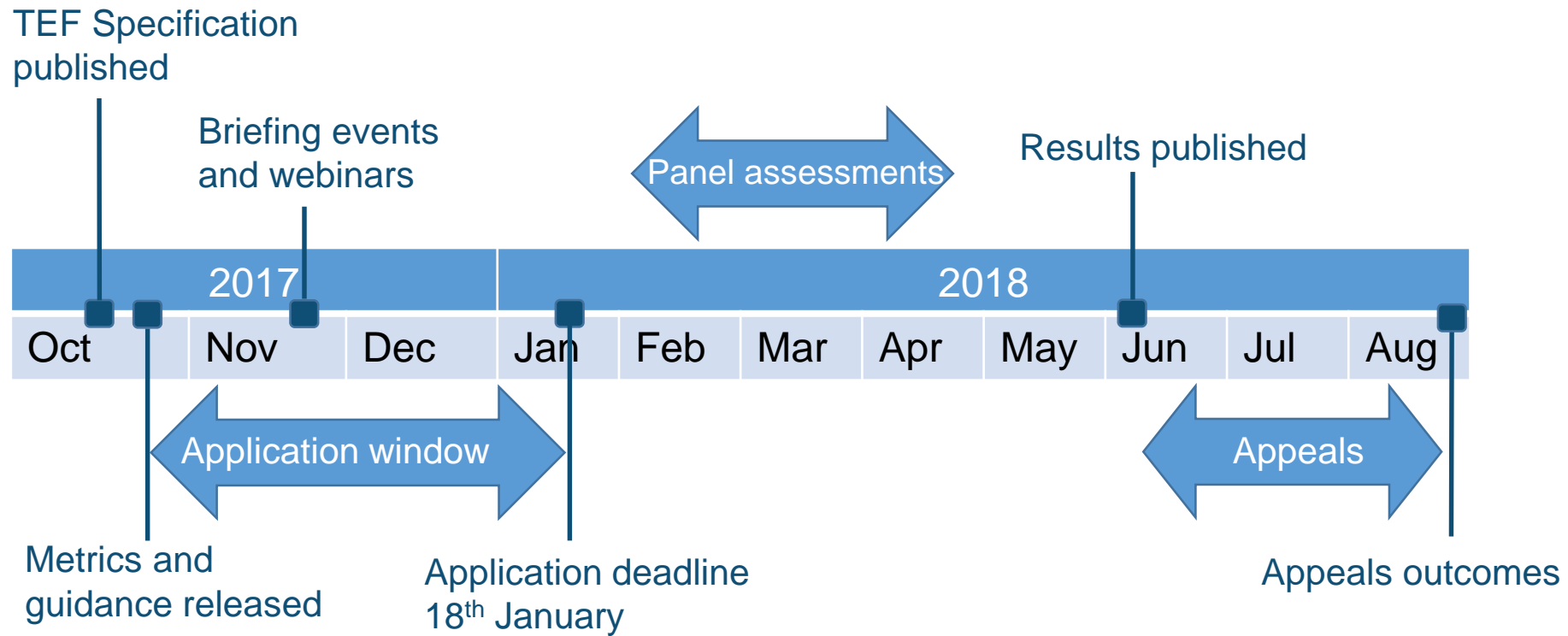 - The process for requesting data amendments

Format

- During this webinar you can submit general questions via the link on your screen

- Enquiries that are specific to your own provider's data should be addressed to tefmetrics@hefce.ac.uk

- Other enquiries about your provider's participation should be addressed to tef@hefce.ac.uk

Key sources of information

- Key documents:
  - The TEF Specification: www.gov.uk/government/collections/teaching-excellence-framework
  - Year Three guidance and technical documents: www.hefce.ac.uk/lt/tef/tefprocess/tef3/.

- Each provider's metrics workbook and individualised student data are available on the TEF extranet:

  https://tef.hefce.ac.uk/extranet/

Year Three timeline

TEF Specification published

Briefing events and webinars

Panel assessments

Results published

2017

2018

Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug

Application window

Appeals

Metrics and guidance released

Application deadline 18th January

Appeals outcomes

Overview of metrics

Core metrics:

1. Teaching on my course (NSS)

2. Assessment and Feedback (NSS)

3. Academic support (NSS)

4. Continuation

5. Employment or further study (DLHE)

6. Highly skilled employment or further study (DLHE)

Supplementary metrics:

1. Sustained employment or further study (LEO)

2. Above median earnings threshold or further study (LEO)

3. Grade inflation (self-declared by providers with DAPs)

Scope of the metrics

- Undergraduate provision

- Full-time and part-time are reported separately

- International students studying in the UK are included in NSS-based metrics only

- Franchised students (i.e. registered at one provider and taught at another) are included in the metrics of the teaching provider:
  - Where taught for part of the qualification by both providers, this is the provider where the student spends the majority of their first year
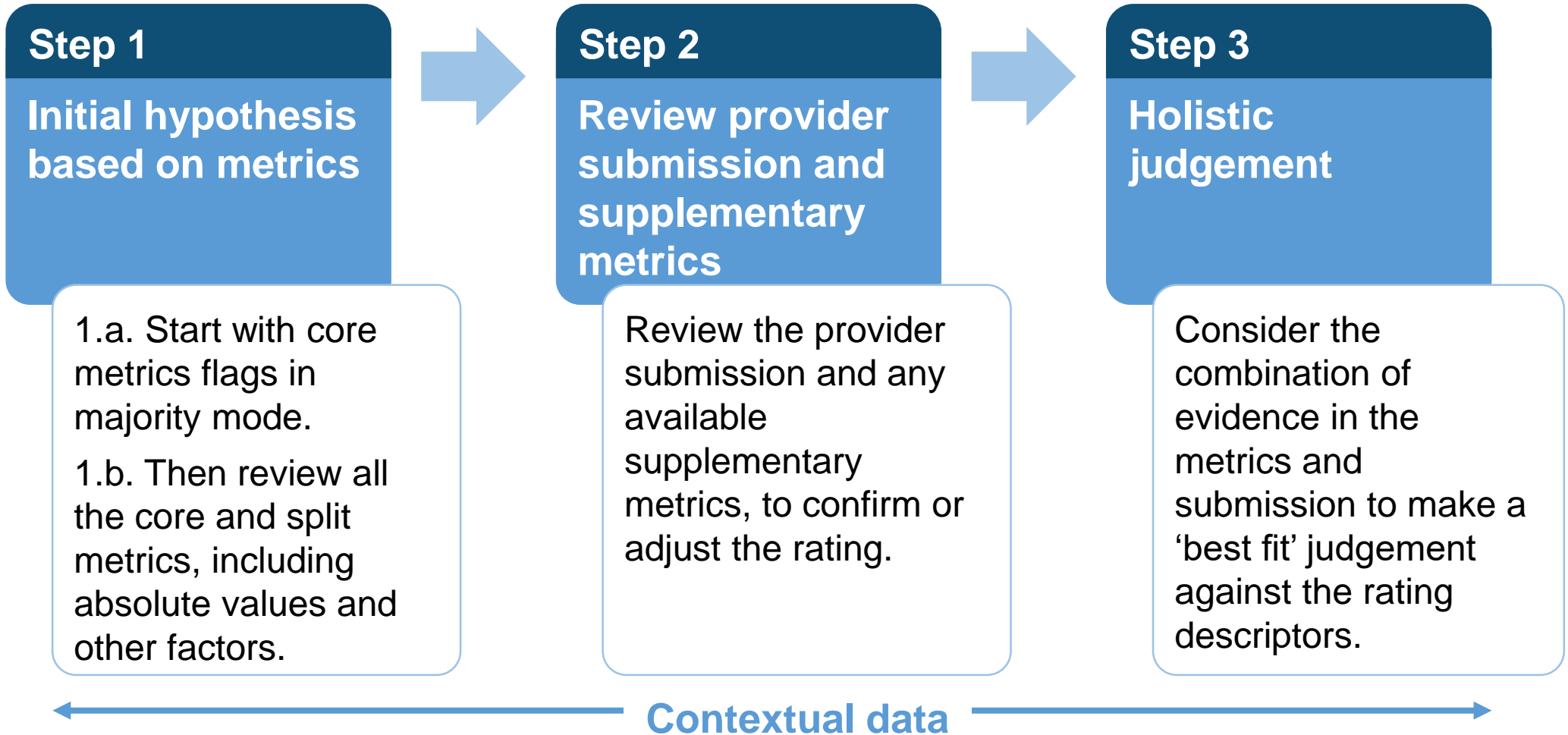
Metrics as a pre-requisite

- To apply for a TEF assessment, a provider needs to have **suitable metrics**:
    - Each of the six **core** metrics in majority mode must be reportable
    - The number of years of metrics (up to 3) will also determine the duration of the TEF award
    - This is not affected by **supplementary** metrics
- If the provider does not have suitable metrics, it may opt-in for a provisional TEF award

The assessment framework

	Teaching Quality	Learning Environment	Student Outcomes and Learning Gain
Aspects of quality:	Teaching Quality	Learning Environment	Student Outcomes and Learning Gain
Criteria:	Teaching quality criteria	Learning environment criteria	Student outcomes and learning gain criteria
Evidence: • Core and split metrics	Teaching; Assessment and feedback (NSS)	Academic support (NSS); Continuation (HESA/ILR data)	Employment / Highly skilled employment or further study (DLHE)
	Split metrics		
• Submission and supplementary metrics	Provider submission		
	Grade inflation (provider declaration)		Sustained employment / Above median earnings or further study (LEO)
Outcome:	TEF award & Statement of findings		

Assessment method

Step 1	Step 2	Step 3
Initial hypothesis based on metrics	**Review provider submission and supplementary metrics**	**Holistic judgement**

1.a. Start with core metrics flags in majority mode.

1.b. Then review all the core and split metrics, including absolute values and other factors.

Review the provider submission and any available supplementary metrics, to confirm or adjust the rating.

Consider the combination of evidence in the metrics and submission to make a 'best fit' judgement against the rating descriptors.

Contextual data

Step 1.a.

- This determines the starting point for the initial hypothesis
- Based on the **six core metric flags in majority mode**
- NSS metrics are weighted at 0.5 and the other three metrics are weighted at 1

Positive flags (either + or ++) with a total value of 2.5 or more, and no negative flags (either - or - -)	The starting point is **Gold**
Negative flags with a total value of 1.5 or more, regardless of the number of positive flags	The starting point is **Bronze**
Any other flag combination	The starting point is **Silver**

Step 1.b

- Very high (*) and very low (!) absolute values:
    - * is similar to a positive flag, if the metric has no negative flags
    - ! is similar to a negative flag, if the metric has no positive flags

- Splits, where flags are present

- Metrics in the minority mode, in proportion to the number of students

- Additional factors:
    - The distribution of flags across the three aspects of quality
    - Distances from benchmarks, where statistically significant
    - National contextual factors

Step 1 variations

- Where at least 35 per cent of a provider's students are part-time:
  - The provider may submit a page of additional data on continuation and employment
  - This will be considered in step 1.b. alongside the metrics

- Where at least 35 per cent of students study in each mode:
  - Step 1.a. and 1.b. will be followed separately for each mode
  - At the end of step 1.b. a single initial hypothesis will be reached

Step 2

- Consideration of the provider submission:
  - Further context
  - Explanation of metrics
  - Additional evidence against the criteria
  - Performance for specific student groups

  Especially the impact of institutional policy and practice

- Consideration of supplementary metrics, where available:
  - Alongside any information in the provider submission, in relation to the associated criteria
  - Acknowledging current limitations of the LEO data

Step 3

- At the end of step 1.b. an initial hypothesis is reached

- This may be adjusted in step 2

- In step 3 the totality of evidence in the metrics and submission is considered, to form a 'best fit' overall judgement against one of the three rating descriptors:

TEF Gold … consistently outstanding and of the highest quality …

TEF Silver … consistently exceeds rigorous national quality requirements …

TEF Bronze … meets rigorous national quality requirements …

Questions ?

Suitable metrics and modes of delivery

Thresholds for reporting metrics

- At least 10 students

- NSS response rate of 50%

- DLHE response rate of 68% (FT) or 59.5% (PT)

- Sufficient benchmarking data (no more than 50% unknown in any factor)

Key	
N	Fewer than 10 students
R	Response rate suppression
SUP	Benchmarking suppression
N/A	No students in the population
DP	Data protection suppression

Suitable metrics and years

Suitable metrics:

- Each of the six core metrics (in majority mode) must be reportable, either when aggregated or for at least one year

Number of years:

- For **each** of the six core metrics (in majority mode):
  – If the overall metric **is** reportable: Number of years is the number of years in which there are some students contributing.
  – If the overall metric **is not** reportable: Number of years is the number of reportable year splits.
- The number of suitable years is the lowest of these values across the six metrics.

Majority mode

- Average over last 3 years
- FT=Full time, PTFD=Part time first degree, PTOUG=Part time other undergraduate

Majority mode	Conditions
FT	FT ≥ PTFD +PTOUG
PTOUG	PTOUG ≥ FT +PTFD and not above
PT	Otherwise

The workbooks – Core metrics

TEF

Number of years of suitable metrics:	3
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Part-time accounts for 35% or more of provision by headcount:	Yes

	Core metrics						Year†			Splits differ?
	Denominator	Indicator (a) %	Benchmark (b) %	Difference (a)-(b)	Z-score	Flag	1	2	3	
Full-time headcount: 285 (62%)										
The teaching on my course	130	90.2	* 84.8	5.4	2.0	+				No
Assessment and feedback	130	87.0	* 78.0	9.0	2.7	+		+		No
Academic support	130	88.2	* 83.6	4.6	1.6					Yes
Continuation	529	86.6	84.2	2.3	1.9				++	Yes
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Part-time headcount: 175 (38%)										
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Core and split metrics

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NSS-based metrics

Years: NSS 2017, 2016 and 2015

Composition: For each of the 3 NSS-based metrics, questions are grouped into scales:

- E.g. the 'Teaching on my course' scale is made up of NSS Q1-4

Calculation of indicator for each scale:

- For **each student** calculate the extent to which they agree to questions in the scale
- Average this over all students who have responded to at least one of the questions in the scale (ignore N/A)

FT Continuation

Year 1 students entering HE in	Year 2	Year 3
2012-13	2013-14	2014-15

Calculation of indicator:

Denominator: UK domiciled entrants in a given year

Numerator: Those in the denominator who in the next year are:

- Active in HE (at any provider we have data for)

- Gained an HE qualification (at any provider we have data for)

PT Continuation

Year 1 students entering HE in	Year 2	Year 3
2011-12	2012-13	2013-14

Calculation of indicator:

Denominator: UK domiciled **first degree** entrants in a given year

Numerator: Students in the denominator who are

- In the next year:
    - Active in HE at <u>another</u> provider we have data for
    - Gained an HE qualification (at any provider we have data for)
- **OR** in the next but one year:
    - Active in HE (at any provider we have data for)
    - Gained an HE qualification (at any provider we have data for)

Employment or further study

Years: UK domiciled qualifiers in 2013-14, 2014-15, 2015-16

Calculation of employment indicator:

Denominator: Working + studying + unemployed + due to start work

Numerator: Working + studying

Calculation of Highly skilled employment indicator:

As above but for those mainly working only include in numerator if SOC major group is 1-3

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Benchmarking

Purpose

- Allow fair comparison between providers by controlling for factors which may affect the metrics that are outside of the providers' control

What are they?

- A weighted sector average where weightings are based on the characteristics of the students at the provider
  - Based on data for <u>all</u> providers
  - An average for similar students/subjects

Benchmarking factors

Factor	NSS	Continuation	Employment or further study	Highly skilled employment or further study	Sustained employment	Above median earnings threshold
Subject of study	✓ (33 groups)	✓ (9 groups)	✓ (9 groups)	✓ (33 groups)	✓ (33 groups)	✓ (33 groups)
Entry qualifications		✓ (full time only, 28 groups)	✓ (4 groups)	✓ (4 groups)	✓ (Full-time only, 4 groups)	✓ (4 groups)
Age on entry	✓	✓	✓	✓	✓ (Full-time only)	✓ (Part-time only)
Ethnicity	✓ (full time only)	✓	✓	✓	✓	✓
Sex			✓	✓	✓ (Full-time only)	✓
Disability	✓			✓		✓
POLAR 3		✓		✓		✓
Level	✓ (full time only)	✓ (full time only)	✓	✓	✓	✓
Year	✓					

Benchmarking – to note

- Difference, Z-scores and standard deviations

- Benchmarking splits

- Sector averages available at
  www.hefce.ac.uk/lt/tef/tefprocess/tech/

- Now frozen for the TEF Year Three, as of 19 October 2017 - regardless of any future amendments to providers' data

The workbooks – Core metrics

TEF

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Z-Scores

- It is not automatically clear whether an indicator is **significantly** different from its benchmark

- The <u>number</u> of students contributing to the indicator and the <u>spread</u> of the data, for both the provider and the sector, determine the standard deviations

- For TEF metrics the number of standard deviations that an indicator is from the benchmark is given as the z-score

- This provides confidence that the difference between the indicator and the benchmark is not down to chance

- Where the difference from the benchmark has a Z-score +/-1.96 SD this is considered **significantly different**

- **Z-scores of greater than +/-3 do not indicate greater significance**

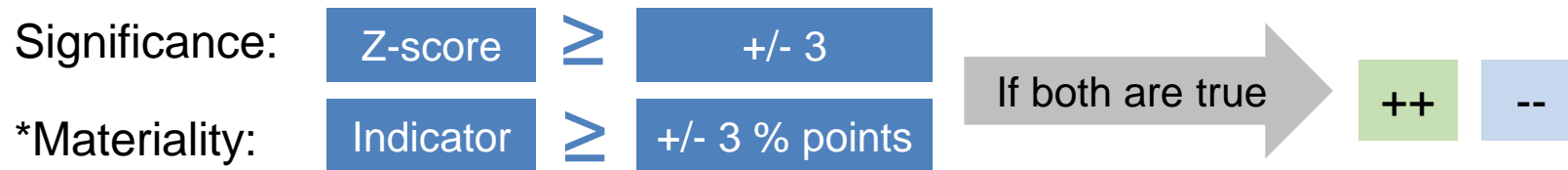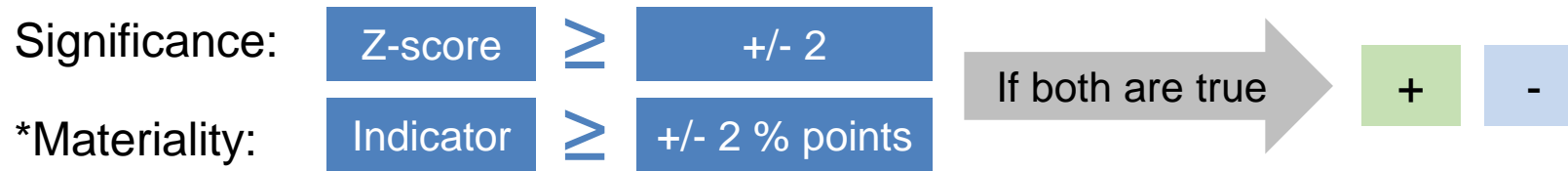# The workbooks – Core metrics

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The workbooks – Flags

TEF

Significance: | Z-score | ≥ | +/- 2 |

*Materiality: | Indicator | ≥ | +/- 2 % points |

If both are true → + -

Significance: | Z-score | ≥ | +/- 3 |

*Materiality: | Indicator | ≥ | +/- 3 % points |

If both are true → ++ --

* Ignored if benchmark above 97%

The workbooks – High/low values

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Very high or low absolute values

* Indicates the value is in top 10 per cent

! Indicates the value is in the bottom 10 per cent

- Thresholds based on large providers

- Same thresholds applied to all providers

- Considered at step 1b, as similar to a positive or negative flag in some circumstances

Very high or low absolute values

Metric	Full time		Part time	
	High	**Low**	**High**	**Low**
The teaching on my course	90.13	80.01	93.11	79.40
Assessment and feedback	83.19	66.86	86.30	66.36
Academic support	87.30	75.21	89.34	73.07
Continuation	95.78	79.78	88.59	64.98
Employment or further study	97.10	90.58	99.26	94.16
Highly skilled employment or further study	83.01	55.30	90.37	63.88
Sustained employment or further study	84.99	77.00	89.06	78.53
Above median earnings threshold or further study	77.51	32.43	82.06	57.14

The workbooks – Splits

	Year			Level of study			Age		POLAR		National IMD		Ethnicity		Disabled		Sex		Welsh medium			Domicile			BME breakdown different to split?
	1	2	3	PG / UG boundary	First degree	Other UG	Young	Mature	Q1 or Q2	Q3, Q4 or Q5	Q1 or Q2	Q3, Q4 or Q5	White	BME	Yes	No	Male	Female	0 to 5	5 to 40	Over 40	UK	Other EU	Non-EU	
Full-time 285 (62%)																									
The teaching on my course				N/A		+	++		++				+	R	N	+	+		N/A	N/A	N/A		N/A	R	No
Assessment and feedback		+		N/A		++	+		+				+	R	N	+	+		N/A	N/A	N/A	+	N/A	R	No
Academic support				N/A		+	+		+					R	N				N/A	N/A	N/A		N/A	R	No
Continuation			++	N/A				++			++					+			N/A	N/A	N/A				No
Employment or further study	R			N/A										N					N/A	N/A	N/A				No
Highly skilled employment or further study	R			N/A		+	+		+					N					N/A	N/A	N/A				No
Part-time 175 (38%)																									
The teaching on my course				N/A	N						N/A	N/A				N			N/A	N/A	N/A		R	N	No
Assessment and feedback		+		N/A	N	+					N/A	N/A				N			N/A	N/A	N/A		R	N	No
Academic support		+		N/A	N						N/A	N/A				N			N/A	N/A	N/A		R	N	No
Continuation		N		N/A							N/A	N/A			N	N			N/A	N/A	N/A				No
Employment or further study				N									R			N			N/A	N/A	N/A				No
Highly skilled employment or further study	-			N		-	--						-	R	N	-	-		N/A	N/A	N/A				No

Changes since Year Two:

- PG/UG boundary
- National IMD for all four nations
- Welsh medium is split 3 ways

The workbooks – Other metrics data

Detailed information on the following can be found in the workbooks:

- **Indicators** – The numeric value of each metric

- **Benchmark** – The numeric value for each benchmark and provider contribution

- **Differences** – The difference between the indicator and the benchmark

- **Z-scores** – Standard deviations and z-score

- **Populations**– The numerators and denominators for the indicators

- **BME breakdown** – More detailed ethnicity splits

Questions ?

Supplementary metrics

The workbooks – Supplementary LEO metrics

	Supplementary metrics					
	Denominator	Indicator (a) %	Benchmark (b) %	Difference (a)-(b)	Z-score	Flag
Full-time						
Sustained employment or further study	212	79.8	82.1	-2.3	-0.4	
Above median earnings threshold or further study	141	43.2	46.5	-3.3	-2.0	-
Part-time						
Sustained employment or further study	89	93.2 *	85.4	7.8	1.9	
Above median earnings threshold or further study	81	65.4	76.5	-11.1	-2.7	-

LEO – Data coverage

TEF

- Longitudinal Education Outcomes experimental data
- Charts the transition of graduates from HE into the workplace
- National Pupil Database ➔HESA/ILR student records ➔ DWP and HMRC benefits and tax records
- Outcomes up to 10 years after leaving HE
- Self-assessed employment only available for 2014-15 tax year, no earnings yet
- Year 3 only: 2010-11 HE qualifiers. Outcomes 3 years after leaving

❌ Northern Ireland providers   ❌ Scottish and Welsh FEIs
❌ Alternative Providers   ❌ Some English FECs

LEO – Sustained employment

- 2010-11 graduates are in sustained employment three years after leaving HE if:

  - in paid PAYE employment for at least one day a month in five out of six months between October 2014 and March 2015, or

  - returned a 2014-15 self-assessment form stating that they received income from self-employment

- TEF metrics take 'sustained employment' together with further study:

  - have a valid higher education study record at any UK HEI or any English AP/FEC in the HESA and ILR Student Records in the relevant **tax year**

LEO – Supplementary metrics

Years: 2010-11 qualifiers in tax year 2014-15

Sustained employment or further study

Numerator: Those in sustained employment or further study

Denominator: UK qualifiers

Above median earnings threshold or further study

Numerator: Those earning over £21,000 or further study

Denominator: UK qualifiers in sustained employment with earnings data, or further study

Grade inflation data

- Provider declared for those with degree awarding powers

- Students taught by the provider

- Time series data: 10 years ago (or year of first awards), 3, 2 and 1 years ago

- Considered alongside information in the submission about grading policy, factors influencing outcomes, and other evidence in relation to 'Rigour and stretch'

- For future years, the intention is generate the data centrally

Grade inflation data

Degree classification awarded	2007-08		2014-15		2015-16		2016-17		Change: 2016-17 % compared with 2007-08
	N	%	N	%	N	%	N	%	
First class honours degree (1st)	126	13%	160	15%	185	20%	198	20%	Increase of 7.3%
Upper Second class honours degree (2:1)	464	46%	500	48%	450	48%	480	48%	Increase of 1.9%
An honours degree classification of Lower Second (2:2), Undivided Second, Third, Fourth, or Pass	390	39%	290	28%	226	24%	217	22%	Decrease of 17.1%
An unclassified honours degree; a general or ordinary degree (resulting from a non-honours course); or an aegrotat degree (to honours or pass)	20	2%	85	8%	85	9%	98	10%	Increase of 7.9%
Of which:									
An enhanced degree with Distinction	0	0%	30	3%	35	4%	45	5%	Increase of 4.5%
An enhanced degree with Merit	0	0%	40	4%	30	3%	35	4%	Increase of 3.5%
An enhanced degree with Pass	0	0%	15	1%	10	1%	15	2%	Increase of 1.5%
A general degree	0	0%	0	0%	0	0%	0	0%	No change
An ordinary degree	0	0%	0	0%	0	0%	0	0%	No change
Any other unclassified degree award	20	2%	0	0%	10	1%	3	0%	Decrease of 1.7%
Total number of Level 6 undergraduate degree qualifications awarded	1,000	100%	1,035	100%	946	100%	993	100%	

Grade inflation data

Verification

- HEFCE will compare to HESA/ILR data

- An explanation may be sought declared data differs by at least 100 students **or** at least 5 percentage points

- Also taking into account size and history of the provider

- Explanation considered by HEFCE Data Panel

Questions ?

Contextual data

Contextual data - Purpose

- Provides consistent contextual information to aid panellists and assessors in understanding the metrics

- Do not directly impact the assessment

- Shows average numbers over the last 3 years

- Reported by benchmark factors or splits

Context data - Contents

- Subject
- Level
- Age
- Ethnicity
- Sex
- Disability
- Tariff

- Domicile
- Local students
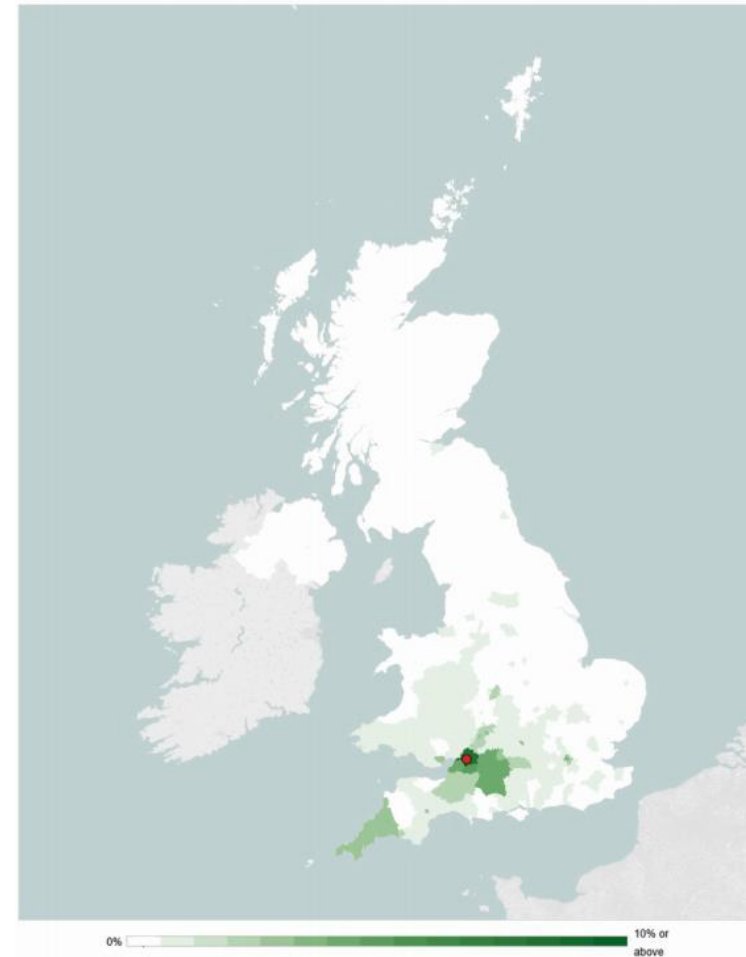- POLAR and IMD
- Communities first
- Welsh medium

Context data - maps

TEF

University of North Bristol

Student domicile prior to entry

0%   10% or above
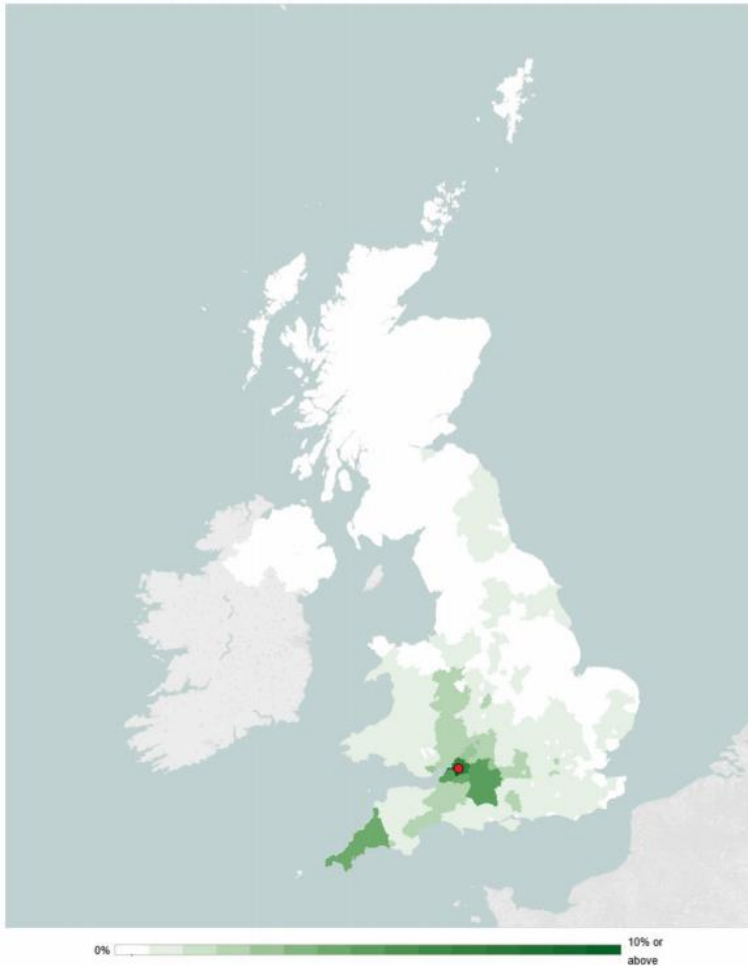
University of North Bristol

Graduate employment locations

0%   10% or above

7

Further information

- Published documents at
  www.hefce.ac.uk/lt/tef/tefprocess/tech/
  - Rebuild documents
  - Sector averages for benchmarks
  - Sector contextual maps
  - Q&As
- Provider-specific data on the TEF extranet at
  https://tef.hefce.ac.uk/extranet/
  - Metrics workbook
  - Contextual maps
  - Individualised files (one per year)

Questions ?

Worked examples

NSS worked example

E.g. 'Teaching on my course' scale is made up of NSS Q1-4

Student	Q1	Q2	Q3	Q4	Percentage Agree
A	Strongly Agree	Strongly Agree	Agree	Neither	75
B	Strongly Agree	Strongly Agree	Agree	N/A	100
C	Strongly Agree	Agree	Agree	Disagree	75
D	Strongly Agree	Agree	Disagree	Disagree	50
E	Agree	Disagree	N/A	N/A	50
TOTAL 5					350

- 5 students responded
- Total percentage agree = 350
- **Teaching on my course <u>Indicator</u> = 70% (**350 ÷ 5)

Benchmarking – Worked example (1) TEF

Provider			
Age category	**Subject**	**Students**	**Continuation**
Young	Agriculture	500	95.0%
Young	History	0	N/A
Young	Maths	150	92.0%
Not Young	Agriculture	400	94.0%
Not Young	History	0	N/A
Not Young	Maths	40	98.0%
			Provider indicator
Total		1,090	94.3%

Benchmarking – Worked example (2)

TEF

	Sector		
Age category	**Subject**	**Students**	**Continuation**
Young	Agriculture	20,000	95.0%
Young	History	80,000	99.0%
Young	Maths	95,000	95.0%
Not Young	Agriculture	5,000	94.0%
Not Young	History	6,500	98.0%
Not Young	Maths	4,000	98.0%
			Sector indicator
Total		210,500	96.6%

* Please note that this slide was edited to correct some minor errors and is
therefore different to the version used in the webinar.

Benchmarking – Worked example (3)

Age category	Subject	Provider % students (a)	Sector Continuation (b)	Weighted sector a × b
Young	Agriculture	45.9%	95.0%	43.6%
Young	History	0.0%	99.0%	0.0%
Young	Maths	13.8%	95.0%	13.1%
Not Young	Agriculture	36.7%	94.0%	34.5%
Not Young	History	0.0%	98.0%	0.0%
Not Young	Maths	3.7%	92.0%	3.6%
			Sector indicator	**Benchmark**
Total		100.0%	3.4%	**94.7%**

* Please note that this slide was edited to correct some minor errors and is therefore different to the version used in the webinar.

Data amendment process

Data amendment process

- TEF will draw upon data that has already been signed off by Heads of Institution (or equivalent)

- Any requests for amendments to this would require:

  – DARF to provide details of amendments

  – Letter confirming authorisation of amendments (including evidence that all parties agree in the case of franchised provision)

- If the DARF is approved:

  – Complete revised data in original format

Data amendment criteria

A data amendment will be made only where **all** of the following criteria are met:

a. Amendments to a year after 2010-11

b. Demonstrable errors in the data that are widespread and significant, affecting a large proportion of the provider's records

c. Agreed by all those directly affected

d. Material impact on core metrics, either

  i.   Changes a flag for a core metric in majority mode

  ii. Change in suitable metrics

Amendment requests timetable

2017

8 November – Deadline for provider to submit DARF

20 November – Notified of whether met criteria a. to c. (otherwise request will not progress beyond this)

1 December – Deadline for provider to submit amended data

14 December – Revised metrics, and notification if criterion d. is met

2018

9 January – Deadline to notify HEFCE of processing errors

Spring 2018 – Data audit

Thank you for listening

Metrics queries: tefmetrics@hefce.ac.uk

Other queries: tef@hefce.ac.uk

General guidance:

www.hefce.ac.uk/lt/tef/

Technical metrics documentation:

www.hefce.ac.uk/lt/tef/tefprocess/tech/

TEF extranet:

https://tef.hefce.ac.uk/extranet/

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