

Contact information

Provider name:

Provider UKPRN:

Validation checks

1. Please ensure that contact details are completed for two people.

The Office for Students (OfS) Privacy Notice for monitoring access agreement and student premium

The OfS publishes a Privacy Notice* on its website which includes information about how we process and use your personal information. Personal information in this context refers to the contact details we ask you to provide. We have provided a summary of how the Privacy Notice relates to how we will process your contact details below.

1. The personal information you provide will be used for the purposes of monitoring compliance with access agreements, spend on student premium and to contact you as part of research to identify good practice in promoting equality of opportunity.
2. The Data Controller of the personal information you submit will be the OfS.
3. Our legal basis for processing your personal information is to comply with our legal obligations and in the performance of a public task.
4. We will store the personal information on secure servers within the United Kingdom or elsewhere within the European Economic Area ("EEA").
5. We share your personal information with researchers contracted by the OfS to conduct research to identify good practice in access and participation.
6. We will hold your contact details for monitoring compliance with access agreements and student premium for a period of ten years in accordance with the OfS disposal schedule and then dispose of them securely. We will use the contact details to contact you in relation to identifying good practice in promoting equality of opportunity for as long as you are the nominated contact and then dispose of them securely.
7. You have certain rights in relation to your personal information, set out on the OfS website.**

You may contact our Data Protection Officer at dp@officeforstudents.org.uk with any queries or concerns you have about the use of your personal information.

	Accountable Officer	Alternative contact
Name		
Job title		
Telephone		
E-mail		

Important template note

Please do not copy and paste cells within this workbook as this can corrupt and overwrite the validation checks. If you need to do so, you can copy and paste into the white formula bar (which can be found just below the command ribbon at the top of the Excel window).

Worksheets contain information critical to accurate loading of the data; it is essential that this is preserved. We may refuse to accept any workbooks which have been purposely unprotected as we cannot be certain of our ability to correctly load the data from such workbooks into our database. We are aware that certain software packages remove the saved passwords; please let us know if you think you may have removed the password in error in this way.

Notes

Cells that you can complete are white; grey cells are auto-populated.

If you are being asked to report on student numbers or expenditure and there are none then please enter 0.

Please see paragraphs 16-17 of the guidance for information on how to complete this table

* <https://www.officeforstudents.org.uk/ofs-privacy/privacy-notice/>

** <https://www.officeforstudents.org.uk/privacy/individual-rights-under-the-general-data-protection-regulation/>

Access and participation (A&P) activity expenditure and hardship expenditure (Table 1)

Provider name:

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Validation checks

- All white cells must be completed.
- In Tables 1a, 1b and 1c the sum of the access agreement-countable funding and student premium funding must not exceed your total expenditure for each activity type.
- In Table 1b, the 'Total expenditure on supporting disabled students' (cell J68) must be equal to Table 1a, Success activity 'Support for disabled students' (cell J44).
- In Table 1b, the total 'of which uses disabled students premium' (cell J69) must not exceed your allocated total disabled student premium in 2018-19 (cell G28).
- In Table 1d, the total 'of which uses student premium funding' (cell J83) must not exceed your allocated total students premium in 2018-19 (cell G29).
- In Table 1e, the total spent on collaborative activity (cell J88) must not exceed the total A&P activity expenditure (cell J35).

Credibility checks

- In Table 1a, you have not recorded any expenditure on support for disabled students in the 'Student success activity' section (cell J44).
- In Table 1b, you have not recorded any expenditure on on-going core work to support disabled students (cell J62).
- In Tables 1a, 1b and 1c you have not recorded any expenditure on some or all of the 'of which uses student premium funding' rows (cells J42, J48, J54, J69 and J77).
- In Tables 1a and 1c you have not recorded any expenditure on some or all of the 'of which uses access agreement-countable funding' rows (cells J41, J47, J53 and J76).

Notes

Please see paragraphs 18-38 of the guidance for information on how to complete this table

Student premium allocations in 2018-19 were:

Support successful student outcomes: full-time (£):	
Support successful student outcomes: part-time (£):	
Disabled students premium (£):	
Total student premium (£):	

Table 1a - A&P activity expenditure

Expenditure category		Expenditure (£)
Access activity	a. Outreach work with schools and young people	
	b. Outreach work with communities and adults	
	c. Outreach work with disabled students	
	d. Strategic relationships with schools	
	e. Staffing and administration	
	Total access expenditure	0
of which uses access agreement-countable funding		
of which uses student premium funding		
Success activity	a. Support for current students (academic and pastoral)	
	b. Support for disabled students	
	c. Staffing and administration	
	Total success expenditure	0
of which uses access agreement-countable funding		
of which uses student premium funding		
Progression activity	a. Support for progression from HE into employment or postgraduate study	
	b. Support for progression of disabled students	
	c. Staffing and administration	
	Total progression expenditure	0
of which uses access agreement-countable funding		
of which uses student premium funding		
Total A&P activity expenditure		0
of which uses access agreement-countable funding		0
of which uses student premium funding		0

Table 1b - Support for disabled students expenditure

Please report on expenditure that has occurred to support disabled students against the categories below	
a. On-going, core work to support disabled students	
b. Expansion of disability services (additional staff, training and resources)	
c. Expansion of assistive technologies	
d. Improvement of inclusivity of teaching and learning	
e. Creation or extension of learning support posts	
f. Other	
Total expenditure on supporting disabled students	0
of which uses disabled students premium	

Table 1c - Hardship expenditure

a. Support for students in financial hardship	
b. Staffing and administration	
Total hardship expenditure	0
of which uses access agreement-countable funding	
of which uses student premium funding	
Total number of students in receipt of hardship funds	

Table 1d - Total A&P activity expenditure and hardship expenditure

Total A&P activity expenditure and hardship expenditure	0
of which uses student premium funding	0

Table 1e - Collaborative activity

Please report on all expenditure on A&P activity that was delivered collaboratively. By collaborative activity, we do not just mean collaboration between providers of higher education. We would normally expect collaborative activity to include many stakeholders rather than be between a single higher education provider and schools, colleges or other stakeholders receiving outreach, but collaboration could be formed in a number of ways, for example, between one higher education provider and several further education and sixth form colleges, other higher education providers, employers, third sector organisations, schools, colleges, training providers or local authorities.

How much of the expenditure reported in Table 1a was spent on collaborative activity? (estimate an amount in £s)

Optional commentary on expenditure in table 1a, 1b and 1c.
Maximum 1500 characters

Expenditure on financial support for underrepresented groups (Table 2)

Provider name:

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Validation checks

1. If you have recorded expenditure in Table 2a, you must record numbers of students in Table 2b, and vice versa.
2. The percentage of students in receipt of financial support (cell J42) should not exceed 100%.

Credibility checks

1. In Table 2a, you have not recorded any total spend on financial support (cell J30).
2. In Table 2b, you have not recorded any students receiving financial support (cell J41).

Notes

Where possible, we would like you to record financial support expenditure by the income group of the beneficiary rather than as 'Students from other underrepresented groups'. Please refer to paragraph 41 of the guidance for further details about these categories.

Please see paragraphs 39-53 of the guidance for information on how to complete this table

Table 2a - Expenditure on financial support for underrepresented groups

Expenditure category			Expenditure (£)
Fee Waivers	Full-time	Students with household residual incomes up to £25,000	
		Students from other underrepresented groups	
	Part-time	Students with household residual incomes up to £25,000	
		Students from other underrepresented groups	
	Fee-waivers for all students		
Bursaries and scholarships	Full-time	Students with household residual incomes up to £25,000	
		Students from other underrepresented groups	
	Part-time	Students with household residual incomes up to £25,000	
		Students from other underrepresented groups	
	Bursaries and scholarships for all students		
Total access agreement spend on financial support			0

Table 2b - Number of students receiving financial support, by underrepresented group

Group of students		Total number of students in receipt of financial support
Full-time	Students with household residual incomes up to £25,000	
	Students from other underrepresented groups	
	Total full-time numbers supported	0
Part-time	Students with household residual incomes up to £25,000	
	Students from other underrepresented groups	
	Total part-time numbers supported	0
Total number of students in receipt of financial support		0
Total number of students in receipt of financial support, as a percentage of the total number of students (from 2018-19 access agreement resource plan)		0.00%

Access agreement expenditure summary (Table 3)

Provider name:

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Validation checks:

1. Where actual spend in cash terms is more than 5% below or 20% above predictions, or percentage point difference in proportion of higher fee income is below 5pp or above 20pp, you must provide commentary.

2. All white cells must be filled in.

Credibility checks:

1. 'Total expenditure' (cells D25 and F25) is more than 'Higher fee income' (cells D20 and F20).

Notes:

Table 3a and 3b auto-populate from the predicted income and levels of spend in your 2018-19 access agreement resource plan, and the data you have recorded in Tables 1 - 2 of this monitoring return. Please check that the figures shown are in line with your expectations.

Column H shows the difference in **cash terms** between your predicted higher fee income and expenditure, and your actual higher fee income and expenditure.

Column I shows the difference between your predicted and actual expenditure as a **proportion of higher fee income** in percentage points.

Please see paragraphs 54-60 of the guidance for information on how to complete this table

Table 3a - Access agreement expenditure summary

	Predicted access agreement-countable expenditure in 2018-19 (from 2018-19 access agreement resource plan)		Actual access agreement expenditure		Difference in expenditure	
	in cash terms (£)	as a proportion of predicted higher fee income (%)	in cash terms (£)	as a proportion of higher fee income (%)	in cash terms (£)	percentage point difference in proportions of higher fee income (pp)
Higher fee income					0.00	
Access expenditure		0.00%	0.00	0.00%	0.00	0.00
Success expenditure		0.00%	0.00	0.00%	0.00	0.00
Progression expenditure		0.00%	0.00	0.00%	0.00	0.00
Expenditure on financial support (including access agreement-countable hardship funds)		0.00%	0.00	0.00%	0.00	0.00
Total expenditure	0.00	0.00%	0.00	0.00%	0.00	0.00

Table 3b - Explanation of differences between predicted and actual expenditure in 2018-19

Total expenditure	
Comparison of your predicted and actual total expenditure in 2018-19 (in cash terms):	A) In line with predictions
Comparison of your predicted and actual proportions of total expenditure in 2018-19:	A) In line with predictions
If either statement shows (B) or (C), you must provide an overview of the reasons for this and the impact on delivering your 2018-19 access agreement commitments (maximum 1500 characters)	

Access expenditure

Comparison of your predicted and actual expenditure on access in 2018-19 (in cash terms):	A) In line with predictions
Comparison of your predicted and actual proportions of expenditure on access in 2018-19:	A) In line with predictions
If either statement shows (B) or (C), you must provide an overview of the reasons for this and the impact on delivering your 2018-19 access agreement commitments (maximum 1500 characters)	

Success expenditure

Comparison of your predicted and actual expenditure on success in 2018-19 (in cash terms):	A) In line with predictions
Comparison of your predicted and actual proportions of expenditure on success in 2018-19:	A) In line with predictions
If either statement shows (B) or (C), you must provide an overview of the reasons for this and the impact on delivering your 2018-19 access agreement commitments (maximum 1500 characters)	

Progression expenditure

Comparison of your predicted and actual expenditure on progression in 2018-19 (in cash terms):	A) In line with predictions
Comparison of your predicted and actual proportions of expenditure on progression in 2018-19:	A) In line with predictions
If either statement shows (B) or (C), you must provide an overview of the reasons for this and the impact on delivering your 2018-19 access agreement commitments. (maximum 1500 characters)	

Financial support expenditure

Comparison of your predicted and actual expenditure on financial support in 2018-19 (in cash terms):	A) In line with predictions
Comparison of your predicted and actual proportions of expenditure on financial support in 2018-19:	A) In line with predictions
If either statement shows (B) or (C), you must provide an overview of the reasons for this and the impact on delivering your 2018-19 access agreement commitments (maximum 1500 characters)	

Sign off

Provider name:

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Validation checks

1. Please ensure the "Assuring your return" table has been completed.
2. Please ensure that accountable officer details are completed.

Notes

Please see paragraphs 61-64 of the guidance for information on how to complete this table

Are all validation checks passed?

No

Assuring your return

I confirm that all the information provided is accurate and has been compiled in accordance with the OfS's guidance

I confirm that the provider's governing body has monitored the provider's compliance with the provisions of the access agreements in force in 2018-19

Accountable officer name

Accountable officer job title