

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 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.

	Main contact	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 will refuse to accept any workbooks which have been unprotected as we cannot be certain of our ability to correctly load the data from such workbooks into our database.

Providers should be aware that providing the OfS with such a workbook may be in breach of conditions of registration. 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; blue cells are auto-populated.

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

Access agreement, 2017-18 monitoring (submission by 23 January 2019)
Student numbers and fee income (Table 2)

Provider name:

Validation checks

1. If you have recorded higher fee income from part-time students in row 30, you must record the number of students in row 24, and vice versa.
2. In Table 2a, the number of part-time students charged above the basic fee should be less than or equal to the total part-time student numbers.
3. Negative adjustments to income above the basic fee must be input as negative numbers.
4. Total higher fee income for a given entrant year cannot be negative.
5. In Table 2c, please select the statement that describes any difference between your predicted and actual numbers of students charged above the basic fee.
6. If your student numbers are 20% higher or lower than predicted, you must also provide commentary in Table 2c.
7. If negative adjustments are recorded, you must provide commentary in Table 2d.

Credibility checks

1. Part-time students should not be charged above the higher fee cap.

Notes

Full-time student numbers and fee income auto-populates using the data you have provided in Table 1.

You need to tell us the total number of part-time students, the number of part-time students charged above the basic fee, the higher fee income generated from fee-regulated part-time students in 2017-18

Please see paragraphs 38-48 of the guidance.

Table 2a - Student numbers		2013-14 entrants	2014-15 entrants	2015-16 entrants	2016-17 entrants	2017-18 entrants
Full-time	All students	0	0	0	0	0
	Students charged above the basic fee	0	0	0	0	0
Part-time	All students					
	Students charged above the basic fee					
Total students by entrant year charged above the basic fee		0	0	0	0	0
Total number of students charged above the basic fee		0	0	0	0	0

Table 2b - Fee income above the basic fee (£)		2013-14 entrants	2014-15 entrants	2015-16 entrants	2016-17 entrants	2017-18 entrants
Full-time	Income above the basic fee	0	0	0	0	0
	Income above the basic fee					
Part-time	Income above the basic fee					
Negative adjustments to income above the basic fee						
Total higher fee income by entrant year		0	0	0	0	0
Higher fee income from students charged above the basic fee		0	0	0	0	0

Table 2c - Student numbers	
Please select the statement that describes any difference between your predicted and actual numbers of students charged above the basic fee.	
Please outline the reasons for this. (maximum 200 words)	

Table 2d - Negative adjustments to income above the basic fee	
Please briefly explain any negative adjustments recorded in Table 2b. (maximum 200 words)	

Access agreement and student premium funding, 2017-18 monitoring (submission by 23 January 2019)

Widening Participation (WP) activity expenditure and hardship expenditure (Table 3)

Provider name:

Validation checks

1. All white cells must be completed.

2. In Tables 3a, 3b and 3c the sum of the access agreement-countable funding and student premium funding must not exceed your total expenditure for each activity.
3. In Table 3b, the 'Total expenditure on supporting disabled students' must be equal to Table 3a, Success activity 'Support for disabled students'.
4. In Table 3b, the total 'of which uses disabled students premium' must not exceed your provider's total disabled student premium in 2017-18.
5. In Table 3d, the total 'of which uses student premium funding' must not exceed your provider's total students premium in 2017-18.
6. In Table 3e, the total spent on collaborative activity must not exceed the total WP activity expenditure.

Credibility checks

1. In Table 3a, you have not recorded any expenditure on support for disabled students in the 'Student success activity' section.
2. In Table 3b, you have not recorded any expenditure on on-going core work to support disabled students.
3. In Tables 3a, 3b and 3c you have not recorded any expenditure on some or all of the 'of which uses student premium funding' rows.
4. In Tables 3a and 3c you have not recorded any expenditure on some or all of the 'of which uses access agreement-countable funding' rows.

Notes

Please see paragraphs 49-72 of the guidance.

Your provider's student premium allocations in 2017-18 were:

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

Table 3a - WP activity expenditure		
Activity type	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. WP staffing and administration	
	Total access expenditure	0
	<i>of which uses access agreement-countable funding</i>	
	<i>of which uses student premium funding</i>	
Success activity	a. Support for current students (academic and pastoral)	
	b. Support for disabled students	
	c. WP staffing and administration	
	Total success expenditure	0
	<i>of which uses access agreement-countable funding</i>	
	<i>of which uses student premium funding</i>	
Progression activity	a. Support for progression from HE into employment or postgraduate study	
	b. Support for progression of disabled students	
	c. WP staffing and administration	
	Total progression expenditure	0
	<i>of which uses access agreement-countable funding</i>	
	<i>of which uses student premium funding</i>	
Total WP activity expenditure		0
<i>of which uses access agreement-countable funding</i>		0
<i>of which uses student premium funding</i>		0

Table 3b - 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
<i>of which uses disabled students premium</i>		

Table 3c - Hardship expenditure		
Hardship	a. Support for students in financial hardship	
	b. WP staffing and administration	
	Total hardship expenditure	0
	<i>of which uses access agreement-countable funding</i>	
	<i>of which uses student premium funding</i>	
Total number of students in receipt of hardship funds		

Table 3d - Total WP activity expenditure and hardship expenditure		
Total WP activity expenditure and hardship expenditure		0
<i>of which uses student premium funding</i>		0

Table 3e - Collaborative activity		

Please report on all expenditure on WP 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 3a was spent on collaborative activity? (estimate an amount)

Optional commentary on expenditure in table 3a, 3b and 3c.
This box is limited to 200 words; however, we are happy for you to upload additional 'supporting information' as a separate Word/pdf document.

**Access agreement, 2017-18 monitoring (submission by 23 January 2019)
Expenditure on financial support for underrepresented groups (Table 4)**

Provider name:

Validation checks

1. If you have recorded expenditure in Table 4a, you must record numbers of students in Table 4b, and vice versa.
2. The percentage of students in receipt of financial support, in row 35, should not exceed 100%.

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 74 of the guidance for further details about these categories.

Please see paragraphs 73-89 of the guidance.

Table 4a - Expenditure on financial support for underrepresented groups			Total expenditure (£)
Fee waivers (including free or discounted foundation years)	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 (including accommodation discounts or other institutional services)	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 4b - Number of students receiving financial support, by underrepresented group			Total number of students in receipt of financial support
Full time	Students with household residual income up to £25,000		
	Students from other underrepresented groups		
	Total full-time numbers supported		0
Part time	Students with household residual income 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			0%

Access agreement, 2017-18 monitoring (submission by 23 January 2019)

Access agreement expenditure summary (Table 5)

Provider name:

Validation checks

1. Where actual spend is more than 5% below or 20% above predictions you must provide commentary (either in cash terms or as a proportion of higher fee income).

Credibility checks

1. 'Total expenditure' is more than 'Higher fee income'

Notes

Table 5a and 5b auto-populate from the predicted income and levels of spend in your 2017-18 access agreement resource plan, and the data you have recorded in Tables 1 - 4 of this monitoring return. Please check that the figures shown are in line with your expectations.

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

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

Please see paragraphs 90-95 of the guidance.

Table 5a - Access agreement expenditure summary	Predicted access agreement-countable expenditure in 2017-18 (from 2018-19 access agreement resource plan)		Actual access agreement expenditure		Difference in expenditure	
	in cash terms (£)	as a proportion of higher fee income (%)	in cash terms (£)	as a proportion of higher fee income (%)	in cash terms (£)	of proportions in percentage points
Higher fee income	0		0		0	
Access expenditure	0	0.0	0	0.0	0	0.0
Success expenditure	0	0.0	0	0.0	0	0.0
Progression expenditure	0	0.0	0	0.0	0	0.0
Expenditure on financial support (including access agreement-countable hardship funds)	0	0.0	0	0.0	0	0.0
Total expenditure	0	0.0	0	0.0	0	0.0

Table 5b - Explanation of differences between predicted and actual expenditure in 2017-18

Total expenditure	
Comparison of your predicted and actual total expenditure in 2017-18 (in cash terms):	A) In line with predictions
Comparison of your predicted and actual proportions of total expenditure in 2017-18:	A) In line with predictions
If either statement shows (B) or (C), you must provide an overview of the reasons for this, the impact on delivering your 2017-18 access agreement commitments, and how you aim to adjust future spend. (maximum 200 words)	
Access expenditure	
Comparison of your predicted and actual expenditure on access in 2017-18 (in cash terms):	A) In line with predictions
Comparison of your predicted and actual proportions of expenditure on access in 2017-18:	A) In line with predictions
If either statement shows (B) or (C), you must provide an overview of the reasons for this, the impact on delivering your 2017-18 access agreement commitments, and how you aim to adjust future spend. (maximum 200 words)	
Success expenditure	
Comparison of your predicted and actual expenditure on success in 2017-18 (in cash terms):	A) In line with predictions
Comparison of your predicted and actual proportions of expenditure on success in 2017-18:	A) In line with predictions
If either statement shows (B) or (C), you must provide an overview of the reasons for this, the impact on delivering your 2017-18 access agreement commitments, and how you aim to adjust future spend. (maximum 200 words)	
Progression expenditure	
Comparison of your predicted and actual expenditure on progression in 2017-18 (in cash terms):	A) In line with predictions
Comparison of your predicted and actual proportions of expenditure on progression in 2017-18:	A) In line with predictions
If either statement shows (B) or (C), you must provide an overview of the reasons for this, the impact on delivering your 2017-18 access agreement commitments, and how you aim to adjust future spend. (maximum 200 words)	
Financial support expenditure	
Comparison of your predicted and actual expenditure on financial support in 2017-18 (in cash terms):	A) In line with predictions
Comparison of your predicted and actual proportions of expenditure on financial support in 2017-18:	A) In line with predictions
If either statement shows (B) or (C), you must provide an overview of the reasons for this, the impact on delivering your 2017-18 access agreement commitments, and how you aim to adjust future spend. (maximum 200 words)	

Access agreement, 2017-18 monitoring (submission by 23 January 2019)
 Overall investment in widening participation activity and financial support (Table 6)

Provider name:

Full-time student numbers summary			
	Students in receipt of financial support whose household residual income is up to £25,000	Students in receipt of financial support in other underrepresented groups	Total number of access agreement-countable financial support recipients
Number	0	0	0
% of total students	0%	0%	0%

Full-time fee levels (£)	2015-16 entrants	2016-17 entrants	2017-18 entrants
Average fee	0	0	0
Maximum fee	0	0	0

Overall investment in widening participation activity and financial support	Access agreement expenditure (£)	Overall expenditure (£)
Higher fee income	0	
Access activity	0	0
Success activity	0	0
Progression activity	0	0
Financial support	0	0
Hardship	0	0
Total expenditure	0	0
Total expenditure (as % of higher fee income)	0%	

Access agreement, 2017-18 monitoring (submission by 23 January 2019)
Commentary on progress against access agreement milestones and targets (Table 8)

Provider name:

Notes

Table 8 should total a maximum of 1000 words. We are happy for you to upload additional 'supporting information' as a separate Word/pdf document.

Providing personal data that is not requested may result in a breach of data protection legislation.

Please see paragraphs 107-112 of the guidance.

Table 8 - Commentary on progress against access agreement milestones and targets

Provide explanations for each target in Table 7a or 7b where you have recorded less than anticipated, no or negative progress (categories iv-vi), and set out the action you have taken to improve. (maximum 1000 characters)

Access agreement, 2017-18 monitoring (submission by 23 January 2019)
Financial support: Evaluation, evidence and impact (Table 9)

Provider name:

Validation checks

1. Please complete Table 9a, including further details if you selected option e.
2. Please complete Table 9b.
3. If you are using the OfS financial support toolkit, please do not complete rows 48-57.
4. If you are not using the OfS financial support toolkit, please do not complete rows 37- 46.

Credibility checks

1. In Table 9a you have selected option 'f) We did not evaluate as we did not provide financial support in 2017-18' but have provided expenditure on 'Table 4a - Expenditure on financial support for underrepresented groups'.

Notes

The OfS supported the development of a set of tools to help providers evaluate the impact of their financial support packages. More information can be found on the OfS website*

Findings reported to us will be used to inform research, but will not be published.

If you used the OfS financial support toolkit, please complete 9c.

If you did not use the OfS financial support toolkit, please complete 9d.

Providing personal data that is not requested may result in a breach of data protection legislation.

Please see paragraphs 113-124 of the guidance.

Table 9a - Evaluating your financial support

Please select the statement which best describes your approach to evaluation of financial support over the past year.

If you selected option (e), please provide details: (maximum 200 words)

Please describe the financial support that you have evaluated and are reporting to us: (maximum 200 words)

Table 9b - Methodology

	Methodology	Yes/No
Please advise of the methodology you have used for your evaluation	The OfS toolkit data model	
	The OfS toolkit survey	
	The OfS toolkit interview questions	
	Own statistical analysis	
	Own survey	
	Own interview questions	

Table 9c - If you used the OfS financial support toolkit: (Please report on the findings from your largest provision of financial support)

	Outcome	Results
If you did a statistical analysis, please select the results from the drop down menu.	Retention into second year	
	Degree completion within five years	
	Achieving a "good" degree	
	Positive graduate outcome within six months	

If you used the interview or survey tools, please tell us a summary of your key findings. (maximum 200 words)

How have you used the findings of the evaluation to inform practice? (maximum 200 words)

Table 9d - If you did not use the OfS financial support toolkit:

If you have not used the OfS financial support toolkits, please tell us how you have most recently evaluated your financial support schemes to inform your approach.

If you have additional examples which you would like to include, we are happy for you to do so in a separate Word document. If you do this, please use the same headings and word limits as set out below in your Word document.

What were you trying to understand from this evaluation? (maximum 30 words)

How did you evaluate the activity/programme? (i.e. What methods did you use?) (maximum 200 words)

What were the findings of the evaluation? (maximum 200 words)

How have you used the findings of the evaluation to inform practice? (maximum 200 words)

*<https://www.officeforstudents.org.uk/advice-and-guidance/promoting-equal-opportunities/using-evidence-to-improve-access-and-participation-outcomes/financial-support-evaluation-toolkit/>

Access agreement, 2017-18 monitoring (submission by 23 January 2019)
Effective practice (Table 10)

Provider name:

Notes

Providing personal data that is not requested may result in a breach of data protection legislation.

Please note that the table will expand as data is entered into each row.

Please see paragraphs 125-132 of the guidance.

Table 10 - Effective practice		
Target group	Lifecycle stage targeted	Brief description of effective practices in your access and participation work. (maximum 200 words)

Access agreement and student premium funding, 2017-18 monitoring (submission by 23 January 2019)
Assuring your return

Provider name:
Provider UKPRN:

Validation checks

1. Please ensure the 'Assuring your return' declarations are completed.
2. Please ensure that accountable officer details are completed.

Credibility checks

1. You have selected 'No' for one or all of the 'Assuring your return' declarations

Notes

Please see paragraphs 136-141 of the guidance.

Are all validation checks passed?	No
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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 2017-18	

Accountable officer responsible for assuring this monitoring return	
Name	
Job title	
Telephone	
E-mail	

Access agreement monitoring, 2017-18 (Submission by 23 January 2019)
Validation

Provider name:

FAILED

Contact

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

FAILED

Table 1 - FT fees

1. There must be at least one course in the table.

FAILED

2. All courses must have a course type.

PASSED

3. All courses must have at least one student.

PASSED

4. All courses must have a course fee.

PASSED

5. Course fees must not exceed the higher fee cap.

PASSED

Table 2 - Students & Income

1. If you have recorded higher fee income from part-time students in row 30, you must record the number of students in row 24, and vice versa.

PASSED

2. In Table 2a, the number of part-time students charged above the basic fee should be less than or equal to the total part-time student numbers.

PASSED

3. Negative adjustments to income above the basic fee must be input as negative numbers.

PASSED

4. Total higher fee income for a given entrant year cannot be negative.

PASSED

5. In Table 2c, please select the statement that describes any difference between your predicted and actual numbers of students charged above the basic fee.

FAILED

6. If your student numbers are 20% higher or lower than predicted, you must also provide commentary in Table 2c.

PASSED

7. If negative adjustments are recorded, you must provide commentary in Table 2d.

PASSED

Table 3 - Activity & Hardship

1. All white cells must be completed.

FAILED

2. In Tables 3a, 3b and 3c the sum of the access agreement-countable funding and student premium funding must not exceed your total expenditure for each activity

PASSED

3. In Table 3b, the 'Total expenditure on supporting disabled students' must be equal to Table 3a, Success activity 'Support for disabled students'.

PASSED

4. In Table 3b, the total 'of which uses disabled students premium' must not exceed your provider's total disabled student premium in 2017-18.

PASSED

5. In Table 3d, the total 'of which uses student premium funding' must not exceed your provider's total students premium in 2017-18.

PASSED

6. In Table 3e, the total spent on collaborative activity must not exceed the total WP activity expenditure.

PASSED

Table 4 - Financial Support

1. If you have recorded expenditure in Table 4a, you must record numbers of students in Table 4b, and vice versa.

PASSED

2. The percentage of students in receipt of financial support, in row 35, should not exceed 100%.

PASSED

Table 5 - Expenditure Summary

1. Where actual spend is more than 5% below or 20% above predictions you must provide commentary (either in cash terms or as a proportion of higher fee income).

PASSED

Table 7 - Targets & Milestones

1. Each target must be categorised by selecting a lifecycle stage from the drop down menu.

PASSED

2. Each target must be categorised by selecting a main target category from the drop down menu.

PASSED

3. Each target must be categorised by selecting a milestone/target type from the drop down menu.

PASSED

4. Each target must be classified as collaborative or not.

PASSED

5. All targets must have baseline data, baseline year, target and target year columns filled in.

PASSED

6. There must be at least two yearly milestone figures recorded for each target.

PASSED

7. Each target must have a performance summary selected.

PASSED

Table 9 - Evaluation - Financial Support

1. Please complete Table 9a, including further details if you selected option e.

FAILED

2. Please complete Table 9b.

FAILED

3. If you are using the OfS financial support toolkit, please do not complete rows 48-57.

PASSED

4. If you are not using the OfS financial support toolkit, please do not complete rows 37- 46.

PASSED

Assurance

1. Please ensure the 'Assuring your return' declarations are completed.

FAILED

2. Please ensure that accountable officer details are completed.

FAILED