

## Circular

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### **Welsh Medium Provision Development Fund: Consultation**

**04 July 2007**

**Ref: W07/25HE**

To: Heads of higher education institutions in  
Wales;

Summary: This circular invites views on proposals for the future use of the HEFCW Welsh Medium Provision Fund in the light of the commitment by heads of institutions, through Higher Education Wales (HEW), to the establishment and implementation of a Strategic Framework and Development Plan for Welsh-medium and Bilingual Higher Education.

Response by: 27 July 2007

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## **INTRODUCTION**

- 1 This circular invites views on proposals for the future use of the HEFCW Welsh Medium Provision Fund in the light of the commitment by heads of institutions, through Higher Education Wales (HEW), to the establishment and implementation of a Strategic Framework and Development Plan for Welsh-medium and Bilingual Higher Education.

## **BACKGROUND**

- 2 Arrangements for the HEFCW Welsh Medium Provision Fund were originally due to be reviewed for implementation from the 2006/07 academic year. However, given the options appraisal exercise in 2006 and the need to await the outcomes of this to determine how this funding should be used in future, the current arrangements were rolled forward for a further year. (Further details of these arrangements are at Annex A.)
- 3 In the light of the new sector Strategic Framework and Development Plan, there is a need to take a fresh look at the use of the development funding made available by HEFCW to ensure that it explicitly supports the Plan.
- 4 The Welsh Medium Higher Education Sector Group (WM HESG) was established towards the end of 2007 to drive forward the Strategic Framework and Development Plan. It consists of a senior representative from each higher education institution.
- 5 The Development Plan which is being put in place by the WM HESG has four sections: the Strategic Framework; Provision Development; Marketing and Progression; and Staff Development. It is referred to below as the Sector Development Plan.
- 6 The substance of this consultation was discussed as a paper prepared by HEFCW for the meeting of the WM HESG on 19 June. The consultation is also informed by the discussions at the WM HESG meeting, as indicated at appropriate points below.

## **FUTURE KEY CRITERIA FOR THE FUND**

- 7 In order to ensure that the Fund supports the Sector Development Plan, HEFCW would expect to adopt the following key criteria:
  - The funding is used to support the development and expansion of Welsh-medium provision.
  - The funding is used directly to support Section 2 of the Sector Development Plan (Provision Development). Projects which are not consistent with the plan will not be funded.
  - The funding is used strategically to ensure the maximum benefit from available resources.
  - Funding is allocated against clear development plans which have measurable outputs, targets and timetables, including for the preparation and delivery of provision, and student enrolments, and that progress will be closely monitored against these.
  - There will be mechanisms for withdrawing/deferring/recovering funding from particular projects if agreed progress is not made, or if there is not sufficient assurance that progress can be made. Funding will then be reallocated to other projects.
- 8 These criteria were endorsed by members of the WM HESG.
- 9 In the light of the link with the Sector Development Plan, the Fund will be called the HEFCW Welsh Medium Provision Development Fund.

## **FUTURE ARRANGEMENTS FOR THE WELSH MEDIUM PROVISION DEVELOPMENT FUND**

- 10 HEFCW will expect to be satisfied that the funding is being used strategically and effectively. It is also essential that this can be demonstrated to the Welsh Assembly Government as part of any case for additional funding.
- 11 The arrangements below are within the context of the role of the WM HESG in determining the Sector Development Plan for Welsh medium provision. They are also phrased in terms of a timetable beginning in 2007/08, although the timetable for moving to the new arrangements is discussed further in paragraphs 18 to 24.
- 12 The sum available for the Welsh Medium Provision Development Fund for 2007/08 will be £390,000. We expect to make a similar sum available in future years. (However, while we can give indicative figures in principle, we cannot guarantee funding in advance of confirmation of HEFCW's grant settlement for the academic year concerned.)
- 13 The aim will be to produce a sector funding plan from 2007/08, with indicative funding allocations for the next two years, while retaining some flexibility to respond to changed circumstances. Projects should not be seen as "one-off" or ad hoc but should be thought through strategically to allow any new provision to become embedded. Within a particular subject area or discipline, there may be smaller projects or stages to a project, but these should be framed within a broader sector strategy for the subject as a whole.
- 14 Some of the funded projects will come through the plans for the initial list of subjects identified by the WM HESG for collaborative development in the sector. Other projects may be put forward by a single institution, or smaller group of institutions, where there is deemed to be a critical mass of provision/lead provider. HEFCW would expect that there will be instances where institutions will be able to draw on their own resources/obtain funding from other sources to contribute to some projects.
- 15 There will be a need to draw up a phased programme for development. In terms of prioritising the list of subjects identified for collaborative development, we suggest that this is explored over the summer/early autumn through consultation by HEFCW and Welsh Medium Teaching Development Centre (WMTDC) officers with WM HESG members. Similarly, institutions will be invited to express interest in other subject areas where they consider they have a lead role/niche provision and these will be discussed further with HEFCW/WMTDC, including any potential for collaboration. A development programme will then be brought to the first WM HESG meeting of the 2007/08 academic year.
- 16 In terms of allocations from the Fund, it is proposed that these are made against the development programme by a panel consisting of the chair of the WM HESG, the Director of the WMTDC, HEFCW officials, plus up to three external members to be invited by the chair of the WM HESG. Decisions will primarily involve a process of negotiation and agreement. For subjects prioritised for collaborative developments, an amount of funding could be set aside for a particular subject area, subject to appropriate development plans being put forward (including through the Welsh medium network panels – previously the Welsh medium subject panels). For applications from individual institutions, detailed proposals would be requested as a basis for releasing an allocation. All materials and resources produced through support from the HEFCW Welsh Medium Provision Fund are expected to be made available to all institutions in the sector. Agreement on how this will be achieved will form part of the discussions on the projects to be funded.
- 17 WM HESG members supported the proposed approach to the new arrangements for the Fund.

## **TIMETABLE FOR THE NEW ARRANGEMENTS**

- 18 In preparing the paper for discussion at the WM HESG meeting, we recognised that we could not move straightaway to a new allocation method and we had therefore suggested a phased approach over two years to replacing the direct allocations from the Fund received by certain institutions.
- 19 Under the existing arrangements, University of Wales, Bangor (UWB), Trinity College (TCC) and University of Wales, Aberystwyth (UWA) receive direct allocations from the Fund based on their higher level of Welsh medium enrolments compared with other institutions in the sector. (University of Wales Institute, Cardiff (UWIC) also receives a much smaller direct allocation but it has also been able to make bids for funding on top of this.) We would expect therefore that UW Bangor, Trinity College and UW Aberystwyth in particular would have some developments which represent ongoing commitments. The approach which we suggested to the WM HESG was for a transitional period whereby these institutions would receive a proportion of their current allocations (say approximately 60% for 2007/08 and 30% for 2008/09 - a total of around £105K and £70K respectively). However, they would be asked to set out the subject areas where this funding would be used, so that they could be considered for inclusion in the sector development programme, and more detailed proposals for the use of the funding as set out in paragraphs 15 and 16 as a basis for releasing the allocations. This would not exclude them from submitting expressions of interest for support in addition to these allocations or from support through the plans for collaborative developments.
- 20 The above approach represented proceeding by incremental adjustment from the present allocation process. However, we indicated at the WM HESG meeting that HEFCW would be open to considering more radical approaches.
- 21 WM HESG members, particularly those from institutions most directly affected, were concerned that even a partial reduction of their earmarked allocations in 2007/08 would destabilise developments already planned and potentially damage the goodwill built up for the new Strategic Framework and Development Plan. They would prefer to have a year's notice and then a clean break with the new method being introduced fully in 2008/09. The Group as a whole appreciated these points.
- 22 In the light of these concerns, we suggest an alternative approach for consideration as part of this consultation:

### **2007/08**

- i) UWA, UWB, TCC and UWIC continue to receive the same core allocations as in 2006/07 uplifted by the overall uplift which has been applied to the HEFCW teaching grant to institutions.
- ii) The portion of the Fund which has been set aside for UWIC and other institutions to make applications for development funding to the Welsh Medium Teaching Development Centre (WMTDC) be similarly uprated.
- iii) Under the current arrangements, a portion of the Fund (approximately £43K in 2006/07) is set aside for additional payments in the light of increases in enrolments against a 2001/02 baseline. The increases in enrolments by individual institutions have not been sufficient for this element to be fully allocated since these arrangements for the Fund were introduced. (The remainder has been added to the development funding made available by the WMTDC.) Measuring consistently against the 2001/02 baseline will also be made more difficult following the changes to the eligibility for premium funding introduced in 2007/08 as this data has also been used to calculate the FTE increases for this element of the Fund. We will need to decide whether this element should be continued in this way in 2007/08. Our preference would be to discontinue this and add it to the sum in (iv) below.

- iv) The sum remaining from the total of £390K available for 2007/08 will be allocated as set out in paragraph 16. Some or all of this would be set aside for those subjects identified by the WM HESG for collaborative development.

#### **2008/09**

Full introduction of the new method in consultation with institutions on existing plans or commitments.

- 23 This alternative approach will provide the stability requested for 2007/08 by retaining direct allocations to the four institutions concerned and setting aside a sum specifically for allocations to the rest of the sector and UWIC. We would still wish for 2007/08 to follow the approach set out in paragraphs 15 and 16, working with WM HESG members and other staff in the sector, HEW and WMTDC officers to begin to draw up the sector programme for provision development and determine how the Welsh Medium Provision Development Fund overall will help support this.
- 24 Thus, we would wish all proposals for the use of funding in 2007/08 to be considered by the panel described in paragraph 15, and against the criteria in paragraph 7, as appropriate.  
This would include:
- the proposals by UW Aberystwyth, UW Bangor, Trinity College and UWIC for the use of their direct allocations (these are considered by HEFCW officers and the WMTDC at present). WM HESG members broadly supported this.
  - the proposals against the sum set aside for other institutions and UWIC (these have always been considered by a small panel);
  - proposals for the remainder of the Fund.
- This will enable the WM HESG to have a comprehensive overview of developments and, where proposals relate to subjects identified for collaborative development, to bring these together into coherent sector subject strategies.

#### **MONITORING**

- 25 We will seek to monitor the use of the funding/progress on the projects through the Welsh Medium Teaching Development Centre in a similar way to that used for the Postgraduate Scholarship and Fellowship Schemes and the development funding for projects which the Centre has previously administered for HEFCW. This will include discussing progress with institutions/network panels/collaborative groupings, etc and keeping HEFCW officers informally up to date, as well as formal progress reports against agreed project plans. These reports can also then form the basis of progress reports to the WM HESG.

## CONSULTATION RESPONSES

26 ***Views are sought in particular on:***

- i) The key criteria set out in paragraph 7;***
- ii) The arrangements for the Welsh Medium Provision Development Fund set out in paragraphs 13 to 16;***
- iii) The transitional arrangements set out in paragraph 19 and/or the alternative approach set out in paragraphs 22 to 24;***
- iv) Assuming that the alternative approach is adopted, whether the element of the Fund which makes additional payments for FTE increases on a 2001/02 baseline should be discontinued for 2007/08.***

27 We would be grateful for responses to be sent to Dr Alison Allan, Senior Learning and Teaching Manager, HEFCW, Linden Court, The Orchards, Ilex Close, Llanishen, Cardiff CF14 5DZ ([alison.allan@hefcw.ac.uk](mailto:alison.allan@hefcw.ac.uk)) by **27 July 2007**.

**Welsh Medium Provision Fund 2003/04 to 2006/07**

Core allocations are made to University of Wales, Aberystwyth; University of Wales, Bangor; Trinity College Carmarthen; and University of Wales Institute, Cardiff (UWIC). Part of the Fund is set aside for institutions, other than UW Aberystwyth, UW Bangor and Trinity College, to make applications for development funding through the Welsh Medium Teaching Development Centre. A portion of the Fund is also available to be allocated on the basis of FTE increases in enrolments against the baseline of 2001/02 enrolments: any sum remaining unallocated is transferred to the programme budget of the Centre for projects and activities to benefit the sector as a whole.

**WELSH MEDIUM PROVISION FUND  
ALLOCATIONS 2006/07**

	<b>Core Fund</b>	<b>Additional Enrolments (FTE)</b>	<b>Additional Enrolment Allocation (£422 per FTE)</b>	<b>Total Allocation</b>
	<b>£</b>		<b>£</b>	<b>£</b>
University of Wales, Aberystwyth	46,763	0	0	46,763
University of Wales, Bangor	102,880		0	102,880
Trinity College, Carmarthen	66,897	40	16,880	83,777
University of Wales Institute, Cardiff	12,992		0	12,992
Welsh Medium Teaching Development Centre (a)	51,970	0	0	51,970
<b>Sub-total</b>	<b>281,502</b>		<b>16,880</b>	<b>298,382</b>
Additional allocation to Programme Budget: Welsh Medium Teaching Development Centre				26,428
			<b>Total</b>	<b>324,810</b>

(a) The following institutions will be eligible to apply for this funding through the Welsh Medium Teaching Development Centre.

University of Glamorgan  
Cardiff University  
University of Wales, Lampeter  
University of Wales Swansea  
University of Wales Institute, Cardiff

University of Wales, Newport  
North East Wales Institute of Higher Education  
Swansea Institute of Higher Education  
Royal Welsh College of Music and Drama