

# Cylchlythyr

# Circular

## Widening Access to Higher Education: 2008/09 Allocations and Related Information

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**To:** Heads of higher education institutions in Wales  
**Response by:** No response required  
**Contact:** Jane Johns  
Telephone: 029 2068 2219  
Email: Jane.Johns@hefcw.ac.uk

This circular sets out the 2008/09 allocations to be made to institutions to support their implementation of widening access strategies. It provides guidance on using the 2008 Annual Monitoring Statement (AMS) template and advance notice about widening access strategies in 2009/10.

This document is available online, in large print, Braille, on CD and on audio CD and cassette. Should you or someone you know require this in an alternative format, please contact us on (029) 2068 2280 or email [info@hefcw.ac.uk](mailto:info@hefcw.ac.uk).

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## Introduction

1. This circular sets out the 2008/09 allocations the Council will make to institutions in support of their implementation of widening access strategies. It also provides a measure of guidance on using the 2008 Annual Monitoring Statement (AMS) template, together with advance notice about our expectations for widening access strategies in 2009/10.

## Background

2. **Widening Access Allocations:** We publish annually:
  - institutions' widening access strategy allocations;
  - widening access premium allocations, which include a Communities First premium and funding for students with non-traditional qualifications; and
  - the Disabled Students Premium.
3. **Annual Monitoring Statements (AMS):** In 2006/07, for the first time, monitoring of widening access strategies was undertaken using the AMS process. The AMS process invites institutions to identify specific and measurable targets at the start of the strategy period against which we can assess annual progress towards the strategy aims. The AMS template enables us to make comparisons between strategies and we anticipate that it will lighten the burden of reporting for institutions. In the light of 2006/07 AMS reporting, this circular offers some brief guidance on the Council's expectations for target setting and the accompanying reporting progress.
4. **Widening Access Strategies 2006 to 2009:** In July 2006 (circular W06/27HE) we indicated that the widening access strategy period would be 2006/07 to 2008/09 and that we would invite institutions to submit new strategies for the period beginning 2009/10. However, the following factors have led officers to conclude that it would be better to delay the strategy request for one year:
  - a. HEFCW's remit letter 2008-09 signalled that a priority in 2008-09 would include work with Welsh Assembly Government officials to refresh *Reaching Higher*, the Assembly's ten-year strategy for higher education. Delaying strategy requests for one year will ensure that our strategy guidance and the resulting new strategies take full account of the refresh outcomes.
  - b. In March 2008 Reaching Wider Partnerships received confirmation of their 2008/10 funding allocations. Inviting new widening access strategy submissions for the period 2010/13 will enable further alignment between widening access and Reaching Wider activities.
  - c. Over the next year, as part of the national development plan for Welsh medium provision, we expect the Welsh Medium Higher Education Sector Group to consider further the role of widening

access in the context of Welsh medium provision and offer advice on the sector's role.

In these circumstances, officers consider it advisable to defer the new three-year strategy start date until 2010/11. Therefore, we would ask institutions to continue with their current strategies and in November 2009 provide AMS targets for 2009/10 as a basis for releasing 2009/10 widening access funding allocations.

### **2008/09 Widening Access-Related Allocations**

5. The sum available for Widening Access Strategy allocations for 2008/09 is **£1,834,038**. Institutions' allocations for 2008/09 are set out in **Annex A**.
6. **Annex B** sets out 2008/09 allocations for the widening access premium and disabled students premium.
7. We will make Widening Access strategy funding allocations in two equal instalments in **November 2008** and **March 2009**. We will release the March 2009 payment subject to the receipt of satisfactory Annual Monitoring Statements in November 2008.

### **2008/09 Annual Monitoring Statement Template and Guidance**

8. The widening access AMS template was published as circular W08/16HE and is available at [www.hefcw.ac.uk](http://www.hefcw.ac.uk) – Publications - Circulars. We will circulate electronically to Heads of Widening Access or their equivalent, by **Friday 27 June 2008**, individual AMS templates containing the 2007/08 targets which institutions set themselves previously. Institutions are requested to report their performance against the 2007/08 targets submitted to us in November 2007 and to set ambitious, but realistic targets for 2008/09.
9. In setting widening access targets for 2008/09 institutions should set **three to four high-level, measurable targets** under each prescribed heading (pre-entry, entry, continuing and outreach) to enable officers to make realistic comparisons between institutions' reports. We appreciate that limiting the number of targets will mean that institutions do not report progress on all widening activities. However, we welcome institutions informing us, separately and on an ad hoc basis, about widening access project updates, web links, press releases, etc, throughout the year.
10. 2008/09 targets should:
  - reflect institutions' widening access key priorities for the period;
  - relate to significant new activities;
  - identify actions to support alignment with regional Reaching Wider Partnerships; or

- focus on actions which respond to emerging Ministerial priorities such as the *Skills that Work for Wales* agenda and the *Independent Review of Further Education in Wales* (Webb, December 2007).
11. Widening access strategies include the area of support for disabled students for which we pay the Disabled Students Premium. Institutions will need to take this into account when setting 2008/09 targets.
  12. Some widening access strategies included a section on retention, in these cases institutions are strongly encouraged to consider including a retention-related target this time round within the AMS 'continuing' section.
  13. Some institutions will want to include a target for their work towards achieving the Frank Buttle Trust Quality Mark for Care Leavers in Higher Education, whilst others might prefer to set a target for developing this work further.
  14. In setting targets, institutions should take account of widening-access related guidance in HEFCW's 2008-09 remit letter published on our website at [www.hefcw.ac.uk](http://www.hefcw.ac.uk) – Publications – Corporate Documents.

#### **Timetable and Authorisation of AMS Returns**

15. As indicated in circular W08/16HE (Annual Monitoring Statements 2008), all institutions should submit the following by the **7 November 2008**:
  - **one** hard copy of all AMS should be collated by each institution and sent to Rachel O'Gorman at the HEFCW office;
  - **one** electronic version of all AMS should be emailed to: [AMS@hefcw.ac.uk](mailto:AMS@hefcw.ac.uk).

These copies will then be distributed internally to appropriate HEFCW officers.

16. AMS returns must be signed off by the Head of Institution.
17. We reserve the right to audit the information provided, and will do so on a sample basis if we have any concerns.

#### **Further information**

18. For further information, contact Jane Johns (tel: 029 2068 2219, email [Jane.Johns@hefcw.ac.uk](mailto:Jane.Johns@hefcw.ac.uk)).

**Widening Access Strategy Allocation 2008/09**

<b>Institution</b>	<b>Eligible Students</b>	<b>Total Students</b>	<b>90% pro-rata to Eligible Students</b>	<b>10% pro rata to % of Eligible Students to Total Students</b>	<b>Total (rounded)*</b>
University of Glamorgan including RWCMD	3,634	14,164	427,145	33,865	461,010
Aberystwyth University	815	7,774	95,796	9,631	105,427
Bangor University	824	6,598	96,854	11,472	108,327
Cardiff University	1,790	18,081	210,399	9,094	219,493
University of Wales, Lampeter	405	2,546	47,604	14,613	62,217
Swansea University	1,546	9,487	181,719	14,970	196,689
University of Wales Institute, Cardiff	1,055	6,626	124,006	14,627	138,633
University of Wales, Newport	1,892	7,180	222,388	24,207	246,595
North East Wales Institute of Higher Education	935	5,533	109,901	15,524	125,425
Swansea Metropolitan University	831	4,217	97,677	18,102	115,779
Trinity College, Carmarthen	316	1,678	37,143	17,300	54,443
<b>Total</b>	<b>14,043</b>	<b>83,884</b>	<b>1,650,634</b>	<b>183,404</b>	<b>1,834,038</b>

\* Totals may not sum due to rounding

**Widening Access and Disability Premium Allocation 2008/09**

<b>Institution</b>	<b>Widening Access Premium</b>	<b>Disability Premium</b>	<b>Total</b>
University of Glamorgan including RWCMD	1,494,727	89,980	1,584,707
Aberystwyth University	292,556	87,120	379,676
Bangor University	288,625	98,780	387,405
Cardiff University	597,944	105,160	703,104
University of Wales, Lampeter	150,857	30,580	181,437
Swansea University	543,662	74,800	618,462
University of Wales Institute, Cardiff	461,467	91,520	552,987
University of Wales, Newport	815,664	69,960	885,624
North East Wales Institute of Higher Education	384,653	78,760	463,413
Swansea Metropolitan University	357,944	39,600	397,544
Trinity College, Carmarthen	106,597	17,160	123,757
<b>Total</b>	<b>5,494,696</b>	<b>783,420</b>	<b>6,278,116</b>