

Cylchlythyr | Circular

Widening access: fee plan funding supporting widening access

Date: 11 March 2015
Reference: W15/03HE
To: Heads of higher education institutions in Wales
Principals of directly-funded further education colleges in Wales, fee plan contacts
Response by: 1 April 2015
Contact: Name: Jane Johns
Telephone: 029 2068 2219
Email: jane.johns@hefcw.ac.uk

This circular requests information on 2012/13 fee plan investment supporting widening access.

If you require this document in an alternative accessible format, please telephone us on (029) 2068 2225 or email info@hefcw.ac.uk.



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Introduction

1. This circular requests information on 2012/13 fee plan investment supporting widening access.

Background

2. In circular [W14/14HE](#) we indicated that we would seek evidence from higher education providers, in response to a remit letter requirement to gather:

‘evidence of the proportion of "student fee" funds devoted to widening access and participation activity from scholarships and bursaries to school partnership and engagement activity, as well as student placement and employment preparation’.

3. We are requesting reports now that the Welsh Government has agreed to extend HEFCW’s Corporate Strategy and targets to 2016/17. The Welsh Government has also delayed the implementation of the new fee and access planning process until 2017/18. Therefore, this has reduced the burden of reporting on higher education providers this year. The fee plan information on investment in widening access should be useful to planners as it will inform the submission of the next set of fee plans for 2016/17 which are the last plans in the current format.
4. We emailed Vice-Chancellors and key contacts (17 February) giving advance notice of this request for evidence.

Student fee investment in widening access and participation activities

5. To meet the Welsh Government’s request, we will collect information on fee plan investment in widening access using the 2012/13 fee plan. We are using this plan as it is the first plan submitted by higher education providers wishing to charge above the basic fee rate of £4,000 and annual monitoring has been undertaken on it.
6. The template, in **Annex A**, provides generic headings under which widening access-related activities and investment can be assigned. This is based on institutional annual monitoring statements (AMS) for 2012/13 fee plans. This format will enable us to aggregate data for reporting to the Welsh Government.
7. While we will require information on the **30% fee plan income** invested in widening access, we recognise that fee plan providers invest more than just fee plan income in widening access, and participation in, higher education activities. If additional information about investment other than from fee plan income is submitted to us we will include it in our report to

Welsh Government. Please indicate any additional investment in widening access activities in the template at Section B, as indicated.

8. In considering whether fee plan activities under 'equality of opportunity' and the 'promotion of higher education' headings fall within the broader definition of 'widening access and participation', higher education providers should take account of the widening access priorities under the *Corporate Strategy* widening access strategic theme, our *Widening Access Strategic Approach*¹ as well as the template headings provided. We recognise that HE providers' widening access-related work will vary according to mission and purpose. If any fee plan activities do not sit under widening access and participation, HE providers should indicate this on the template provided.
9. Individualised templates based on institutional fee plan AMS for 2012/13 will be sent to fee plan contacts by Rachel O'Gorman by **Friday 13 March 2015**.

Timetable

10. Please note the following dates:

Action	Date
Individual templates sent to fee plan contacts	Friday 13 March 2015
Templates submitted to HEFCW	Wednesday 1 April 2015
HEFCW to draft report to Welsh Government	Friday 10 April 2015

Further information / responses to

11. For further information, contact Rachel O'Gorman (tel: 029 2068 2227; email rachel.ogorman@hefcw.ac.uk).

¹ HEFCW has defined widening access, which includes participation, in its [Widening Access Strategic Approach](#).

Institution	
Institutional Contact name for Fee Plans	
Post held	
Contact details – Email/Tel	

Section A

2012/13 fee plan targets and activity	Investment in WA activity £	Additional information on activities/expenditure. (Please confirm the target group and target ages (for example, give the school year or note adults are targeted). Please describe the activity. Where activities have names for example, 'Sciencebio' please clarify the activity's purpose for example 'science skills development' or aspiration-raising science project'.)	Please categorise the activities using the headings outlined in the footnotes¹
HEFCW will forward individualised templates to fee plan contacts for completion on Friday 13 March 2015.			

¹ (1) school partnership and engagement; (2) college partnership and engagement; (3) adult learning; (4) scholarships and bursaries; (5) retention/progression through HE support; (6) student support; (7) equality, diversity, inclusive approaches (for those with protected characteristics); (8) student placement and employment preparation; (9) other, please specify.

Section B

2012/13 fee plan AMS reporting	Actual expenditure 2012/13 as confirmed in 2012/13 AMS (£)	2012/13 investment in widening access or other activities (£)	
Fee Plan income invested in equality of opportunity and promotion of higher education		Fee plan income invested in widening access activities	£
		Fee plan income invested in activities other than widening access	£
Fee plan investment which is at least 30% of fee income	£		
		Funding invested in widening access activities from sources other than fee income	£

I confirm that investment figures in the above table are correct and reconcile with those provided in the 2012/13 fee plan AMS.

Signature (Fee Plan contact):	Date:
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