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| Annual Monitoring Guidelines 2023-24 |
| Process guide for Annual Monitoring, about performance in 2022-23 at programme, CAH-02 subject, and University level. |
| Standards and Enhancement Office, September 2023 |



# Contents

[Contents 2](#_Toc149820641)

[Annexes 3](#_Toc149820642)

[Introduction 4](#_Toc149820643)

[Data used in annual monitoring 5](#_Toc149820644)

[Exception reporting 7](#_Toc149820645)

[The stages of annual monitoring 8](#_Toc149820646)

[Stage 1: Programme Plan 10](#_Toc149820647)

[The purpose of the Programme Plan / Apprenticeship Self-Assessment Report 10](#_Toc149820648)

[Writing the Programme Plan 10](#_Toc149820649)

[UNIPULSE Reports 12](#_Toc149820650)

[Exception Reporting 12](#_Toc149820651)

[Discussion of Programme Plan with staff and students 12](#_Toc149820652)

[Stage 2: Off Campus Reports 13](#_Toc149820653)

[Live Action Partnership Plan (LAPP) 13](#_Toc149820654)

[Stage 3: Subject Quality Enhancement Plan 14](#_Toc149820655)

[The purpose of the Subject Quality Enhancement Plan 15](#_Toc149820656)

[Completing the Subject Quality Enhancement Plan 17](#_Toc149820657)

[Writing the Subject Quality Enhancement Plan 17](#_Toc149820658)

[Annual Data Monitoring Reports 18](#_Toc149820659)

[A note about the benchmarks for the Core Metrics at Subject level 18](#_Toc149820660)

[Benchmarks for Core Metrics at Subject level 19](#_Toc149820661)

[Exception Reporting 20](#_Toc149820662)

[Discussion of SQEP with staff and students 20](#_Toc149820663)

[Subject Quality Improvement Plan for Apprenticeships 20](#_Toc149820664)

[Stage 4: University Quality Enhancement Plan 21](#_Toc149820665)

[The purpose of the University Quality Enhancement Plan 21](#_Toc149820666)

[Steps to complete the University Quality Enhancement Plan 22](#_Toc149820667)

[Writing the UQEP 22](#_Toc149820668)

[University Annual Data Monitoring Report about 2022-23 23](#_Toc149820669)

[Discussion of UQEP with staff and students 23](#_Toc149820670)

# Annexes

The following annexes support the Annual Monitoring process and can be downloaded via the [Standards and Enhancement Office webpages](https://hub.bolton.ac.uk/Quality/RM/AnnualMonitoring/Home.aspx) on the Universty of Bolton website.

1. Form AM1: Programme Plan template
2. Form AM2: Subject Quality Enhancement Plan (SQEP) template
3. University Quality Enhancement Plan (UQEP) template
4. Best Practice Guide to Curriculum Design, for information on University requirements regarding Campus Plus, curriculum philosophy, Graduate Attributes Matrix for Employability (GAME/GAME+), and Teaching Intensive, Research Informed (TIRI) strategy
5. Off Campus Partnership Oversight and Development Handbook, 2023-24
6. UNIPULSE Virtual How-To Guide

# Introduction

The national Office for Students (OfS) uses the following Core Metrics to evaluate the performance of the University:

**Student Experience measures**

1. Teaching on my course (NSS)
2. Assessment and feedback (NSS)
3. Academic support (NSS)

**Student Outcomes measures**

1. Continuation (introduced 2022) (from entry to next level)
2. Completion (introduced 2022) (using the cohort tracking method)
3. Progression (introduced 2022) (progression to graduate level employment and/or further study, 15 months after completion of study)

OfS publish these metrics in various dashboards, for example:

* [Student outcomes: Data dashboard - Office for Students](https://www.officeforstudents.org.uk/data-and-analysis/student-outcomes-data-dashboard/data-dashboard/)
* [NSS: provider-level dashboard - Office for Students](https://www.officeforstudents.org.uk/data-and-analysis/national-student-survey-data/provider-level-dashboard/)
* [TEF data dashboard: Data dashboard - Office for Students](https://www.officeforstudents.org.uk/data-and-analysis/tef-data-dashboard/data-dashboard/)
* [APP data dashboard - Office for Students](https://www.officeforstudents.org.uk/data-and-analysis/access-and-participation-data-dashboard/data-dashboard/)

These are based on statutory returns and surveys from the previous academic years and provide data split by various modes, levels of study and different demographic groups. They are the official metrics by which the University is externally monitored and are therefore essential for compliance with HE regulations and audits.

However, the OfS dashboards do not provide timely metrics for rapid monitoring of the previous academic year at subject and programme level to inform programme and quality enhancement plans for the current year. For these we use reports and dashboards provided by our internal Student Data Management team (SDM) based on: (a) more detailed data downloaded from the NSS and Graduate Outcome survey results, (b) our internal SITS database of student enrolments and awards, and (c) our internal CELCAT database of student attendance.

The University’s annual monitoring arrangements use the OfS Core Metrics plus other metrics, as determined by the Executive Board, to evaluate performance at programme, Subject, Off Campus Division and University levels. The national Office for Students sets and uses benchmarks when evaluating the University’s performance, hence the same[[1]](#footnote-1) benchmarks have been used internally to evaluate performance against the Core Metrics. The Executive Board has identified suitable benchmarks for the remaining key performance indicators that are called ‘University KPIs’. When the Access and Participation Plan was written, the Executive Board set benchmarks for the *APP Related Metrics for selected Target Demographic Groups.*  The annual monitoring data reports include APP related metrics and benchmarks.

Annual monitoring consists of a review of performance in the preceding academic year, 2022-23, and planning for action that will be taken in 2023-24. Annual monitoring occurs at programme, subject, Off Campus Division and institutional levels. The types of report include:

* Programme Plans to be written at programme level;
* Subject Quality Enhancement Plans to be written at Subject level;
* Off Campus Division Quality Enhancement Plan and Annual Review about all off campus provision;
* University Quality Enhancement Plan to be written at institutional level.

The first Student Staff Liaison Committee (SSLC) meeting of each academic year receives and considers and confirms the relevant draft Programme Plan(s). The first School Board subsequently considers and confirms the draft Subject Quality Enhancement Plans (SQEPs).

On campus, the Subject Quality Enhancement Plans inform:

* Annual Planning for each Faculty and its Subjects and the Schools’ analyses of the Student Success Strategy
* The University Quality Enhancement Plan

Off campus, the Off Campus Division Quality Enhancement Plan and Annual Review provides metrics-based oversight of all Off Campus provision, including a partnership level action plan from each partner responding by exception to metrics which do not meet benchmark.

From 2022-23 onwards, the Off Campus Board of Study considers and confirms the Off Campus Division Quality Enhancement Plan and Annual Review. The annual process is as follows: for partners who receive NSS data, a template responding to metrics which do not meet benchmark is completed as soon as possible by the programme team after the release of the data in August, and returned to the Student Experience team in October. This template is then incorporated into the Programme Plan action plan following the November census date. For Off Campus provision, an SSLC must be convened after the November census date, but before the Programme Plan submission data in December, in order to consider the draft Programme Plan (programme level discussion). The Programme Plan is a requested document at the Partnership Development Meeting (PDM) for each partner organisation (Partnership level discussion). Programme issues are fed back through Partnership Programme Plans, via the Link Tutor, to the on campus Programme team for review and incorporation into the Subject Quality Enhancement Plan (SQEP) by SQEP authors. In addition, programme issues which impact on partnership operation are recorded on the Live Action Partnership Plan (LAPP) for each partner following the PDM. Any matters of concern are escalated to the Partnerships Panel. The Programme Plans for flying faculty programmes also feed into the Quality Standing Panel, which is a standing agenda item at the Divisional Board of Studies.

## Data used in annual monitoring

The Programme Plan, and all Quality Enhancement Plans use the following metrics to evaluate performance:

**Core metrics:**

1. Teaching on my course (NSS)
2. Assessment and feedback (NSS)
3. Academic support (NSS)
4. Continuation (from entry to next level) (introduced 2022)
5. Completion (using the cohort tracking method) (introduced 2022)
6. Progression (progression to graduate level employment and/or further study, 15 months after completion of study) (introduced 2022)

**University Key Performance Indicators (KPIs):**

1. Applications (number)
2. Conversion Rate (% applications to enrolment)
3. Enrolments (number)
4. Attendance (%) (CHANGED for 2023)[[2]](#footnote-2)
5. Average Module Mark (mean %)
6. Modules passed first time (%)
7. Achievement of ‘Good Honours’ Degrees (% gaining first and upper second) (UNIPULSE)

The following ***Access and Participation Plan (APP) metrics*** are also included for on campus provision and for English Off Campus partners that use University of Bolton student numbers (indirectly funded):

**APP Related Access Metrics: Proportion of New UK Enrolments for Under-Represented Demographic Groups**

1. Number of students enrolling: New UK enrolments (N)
2. Proportion of students who are Male (%)
3. Proportion of students who are Female (%)
4. Proportion of students who report that they have a disability: Disabled (%)
5. Proportion of students who are from a Black, Asian, or other Minority Ethnic background: BAME (%)
6. Proportion of students who are Mature (%)
7. Proportion of students who are from Polar4 Quintile (%)
8. Proportion of students who are from IMD Quintile (%)

In addition, this year, the Subject Quality Enhancement Plan (SQEP) and University Quality Enhancement Plan (UQEP) will use the following ***APP Related Metrics*** to evaluate performance:

**APP Related Metrics for the selected Target Demographic Groups:**

* APP Gaps 1-4: Attainment gap metrics for target Demographic Groups:
	1. The attainment gap between POLAR4 Quintile 1 and Quintile 5 for full time undergraduate students
	2. The attainment gap between IMD Quintile 1 and Quintile 5 for full time undergraduate students
	3. The attainment gap between full time undergraduate Black students and White students
	4. The attainment gap between full time undergraduate Asian students and White students
* Continuation Gaps for Target Demographic Groups
1. The continuation gap between full time undergraduate Black students and White students
2. The continuation gap between full time undergraduate Asian students and White students
3. The continuation gap between full time undergraduate Mixed Ethnicity students and White students
* Progression Gaps for Target Demographic Groups (2020/21 leavers[[3]](#footnote-3))
1. The progression gap between part time undergraduate IMD Quintile 1 and Quintile 5 students
2. The progression gap between full time undergraduate Asian and White students

## Exception reporting

The authors of the Programme Plan, and Quality Enhancement Plans are invited to evaluate performance data against **benchmarks** to identify, **by exception**, which metrics or KPIs show scope for improvement.

The Programme Plan and Quality Enhancement Plans seek to:

* **analyse** data for Core Metrics and KPIs against national or University benchmarks;
* use **exception reporting** to comment ONLY on practice relating to metrics whose value does **not** meet the relevant OfS or University benchmark - to identify **areas for improvement**;
* with reference to the Core Practices of the UK Quality Code for Higher Education create an Action Plan and identify **areas for improvement**;
* indicate what **action** is to be taken to enhance those **areas for improvement.**

The Office for Students’ B Conditions define the general ongoing conditions of registration for all UK Higher Education institutions, with which HEIs are expected to demonstrate continuous alignment as part of assuring academic standards and quality and complying with the regulatory framework for HE.

# The stages of annual monitoring

The following table summarises the stages of the annual monitoring process at programme, partner, subject, Off Campus Division and University levels:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Stage** | **Organisational unit** | **Type of report** | **Author** | **Census date for SDM to provide the data**[[4]](#footnote-4) | **Due date** |
| **1** | On campus programmes | Programme Plan | Programme leader | 06/11/2023 | **04/12/2023** |
| On campus Apprenticeship programmes | Self-Assessment[[5]](#footnote-5) | Programme Leader | 06/11/2023 |
| Off campus programmes | Programme Plan[[6]](#footnote-6) | Partner’s Course Manager supported by UoB Link tutor | 06/11/2023 |
| **2** | Off campus: partner organisation | Live Action Partnership Plan (LAPP) | Partnership Management team | N/A | **Continuous** |
| Off Campus Division | Off Campus Division Quality Enhancement Plan and Annual Review | Partnership Management team | 06/11/2023 | **January/February 2024** |
| **3** | Subject (CAH-02) – comprising all on and off campus programmes | Subject Quality Enhancement Plan (SQEP) | AC (SELE) for majority of programmes in each subject | 06/11/2023 | **12/01/2024** |
| On campus Apprenticeship programmes | Subject Quality Improvement Plan (SQIP)3 | AC (SELE) | 06/11/2023 |
| **4** | Apprenticeships Team | University Self-Assessment & Quality Improvement Plan3 | Director of Apprenticeships | 06/11/2023 | **15/12/2023** for distribution to SAR Panel on 11/01/2024 |
| Standards and Enhancement Office | University Quality Enhancement Plan (UQEP) | Academic Registrar or nominee | 06/11/2023 | **January/February 2024** |
| **5** | Vice Chancellor’s Office | Governors’ Annual Assurance Statement on Quality | Assistant Vice Chancellor (OfS) | 06/11/2023 | **January 2024** |
| Vice Chancellor’s Office | Apprenticeships Self-Assessment Report to Ofsted3 | Director of Apprenticeships | 06/11/2023 | **During February 2024 Board of Governors to receive copy of the SAR** |

# Stage 1: Programme Plan

## The purpose of the Programme Plan / Apprenticeship Self-Assessment Report

The Programme Plan evaluates the current healthof a programme (or, by agreement with the relevant AC SELE, a cluster of programmes). From analyses of performance data, it identifies any required improvements and the action to be taken to secure that improvement.

For on campus programmes, the author of the Programme Plan is normally the Programme Leader. For off campus programmes, the Partner’s Course Manager normally complete the Programme Plan(s), supported by the Link Tutor (LT).

For Schools that deliver apprenticeships, the Programme Leader completes a programme-level self-assessment report for consideration by a subject-level SAR Panel. This process is managed by the Apprenticeships Team under the leadership of the Director of Apprenticeships. The programme-level self-assessment reports will inform the University Self-Assessment Report for Apprenticeships to be considered at the SAR Panel (in January) prior to submission to Ofsted.

To evaluate performance the author(s) of the Programme Plan uses the Report(s) from the External Examiner(s) plus data, as indicated above, from UNIPULSE for the following metrics. Note however that the NSS results are only available for the largest programmes, with 10 or more respondents from the survey.

**Core metrics:**

1. Teaching on my course (NSS)
2. Assessment and feedback (NSS)
3. Academic support (NSS)
4. Course Continuation (from entry to next level) (introduced 2022)
5. Course Completion (using the cohort tracking method) (introduced 2022)
6. Progression (progression to graduate level employment and/or further study, 15 months after completion of study) (introduced 2022)

**University KPIs:**

1. Applications (number)
2. Conversion Rate (% applications to enrolment)
3. Enrolments (number)
4. Attendance (%) (CHANGED for 2023)
5. Average Module Mark (mean %)
6. Modules passed first time (%)
7. Achievement of ‘Good Honours’ Degrees (% gaining first and upper second)

## Writing the Programme Plan

The steps to complete the Programme Plan / Apprenticeship Self-Assessment Report are:

1. **analyse** the data for Core Metrics and University KPIs against the given benchmarks. The data are provided in the UNIPULSE report for the Programme(s) (see below) and the benchmarks are given in the template for the Programme Plan (form AM1);
2. use **exception reporting** to identify **only** those Core Metrics and/or University KPIs where the performance value **does** **not** meet the necessary **benchmark**. In this way you have identified the **areas for improvement (AFIs)**;
3. Use the outline for an action plan, given in the Programme Plan template, to create an Action Plan to enable relevant role holders to resolve **areas for improvement**,in a timely way. The outline for an action plan refers to the Office for Students B conditions.

**A Programme Plan should be written for** **the on campus programme and be informed by themes in the off campus programme**. Where a programme has multiple delivery locations, the on campus [Programme Leader](http://reports.bolton.ac.uk/Docs/Pages/Report.aspx?ItemPath=%2fReporting+General%2fAnalysis+of+Applications%2fAoA+-+Maintenance+-+SITS+staff+roles&ViewMode=Detail) is expected to request a summary of distilled information about the off campus versions of the programme from the Head of Off Campus Collaborative Partnerships. The common themes (good practice and areas for improvement) should either be addressed within the Programme Plan or be escalated to the AC (SELE) for reporting in the Subject Quality Enhancement Plan (SQEP).

The author(s) uses form AM1 in the Annual Monitoring annexes to draft the Programme Plan. There is a **census period of 6th – 10th November 2023**[[7]](#footnote-7) for you to access the UNIPULSE data about your programme’s performance in Core Metrics and University KPIs.

The Programme Plan author(s) requires the following items:

1. The **template for the Programme Plan** (form AM1)
2. **The UNIPULSE Course Summary** during the **census period** of **6th – 10th November 2023**. The Course Summary comprises data about the performance of the programme(s) against the Core Metrics and University KPIs. The [**UNIPULSE**](https://pbireports.bolton.ac.uk/pbireports/powerbi/Office%20For%20Students%20Development/PULSE/UNIPULSE) Course Summary is available from the University website,it is accessible either when using a PC on campus or when using a remote connection using two factor authentication.
3. The **Module Reports** written by Module Leaders using the MEQ data;
4. The **External Examiner’s Report(s)**, available from [**Qualtrak**](http://qualtrack.bolton.ac.uk/) for review, response and comment in the Programme Plan;
5. The **formal written reply** (letter) to the External Examiner about her/his report, indicating the nature of any action being taken in response to any recommendations in the report. This should have been authorised either within the School according to local practice or by the academic Registrar, where urgent action had been identified.
6. **Views of Employers/ Professionals about the programme.** A summary of comments received from employers or the profession and relevant outputs from meetings the Industry Advisory Board that about the programme.
7. **Research Informed delivery.** A summary of ways in which research outputs from research activities of the programme team have impact on the programme.

The author(s) of an Apprenticeship Self-Assessment Report requires the following additional items:

1. In-year and best case QAR data for Apprenticeships[[8]](#footnote-8)
2. Apprentice Employer’s views captured in a variety of ways, e.g. through Apprentice’s Reviews, contract management meetings with Levy Employers, where held, feedback from the FE Choices Employer Survey and Industry Advisory Boards, as appropriate.
3. Evidence to show how well students are prepared for End Point Assessment for the Apprenticeship Standard, make successful progress and achievement.
4. Self-assessed judgements against the Education Inspection Framework (Apprenticeship Programmes only). Evidence to support a judgement grade against: Quality of Education, Leadership and Management, Personal Development and Behaviour and Attitudes.

## UNIPULSE Reports

The data are presented in charts, many of which show benchmarks, colour coded, as follows:

* a **green line** to show the **benchmark** to be achieved
* a **red line** to show the **minimum acceptable level** for a given data item

Course Summaries for inclusion in Programme Plans can be located on [**UNIPULSE**](https://pbireports.bolton.ac.uk/pbireports/powerbi/Office%20For%20Students%20Development/PULSE/UNIPULSE). The SEO [web page for Annual Monitoring](https://www.bolton.ac.uk/Quality/RM/AnnualMonitoring/Home.aspx#gsc.tab=0) contains a ‘How-To-Guide’ about UNIPULSE.

## Exception Reporting

There is **no need to comment** in the Programme Plan where the value for the Core Metric or University KPI **meets the required benchmark**. Not all charts contain benchmarks. Where a chart does not contain benchmarks, please provide an explanation of the trends shown by the data and indicate the action that has been taken so far and that will be taken in future. To support the analysis, it is possible to ‘drill through’ the data in the UNIPULSE Course Summary charts to reveal more granular detail, down to the level of an individual student.

## Discussion of Programme Plan with staff and students

Once the Programme Plan has been written, it should be disseminated, as follows:

1. The Programme Plan should be presented to the first Student, Staff Liaison Committee (SSLC). The discussion with staff and students is to enable them to contribute to the narrative and to finalise the document before the due date of **Monday, 4th December, 2023.**
2. The confirmed Programme Plan should be forwarded to the Subject Lead and the Academic Coordinator (AC SELE);
3. The agreed final Programme Plan should also be uploaded by the author onto the Quality Portal on Moodle. For advice about the location and access to the relevant Quality Portal please see the AC SELE for your School.

# Stage 2: Off Campus Reports

## Live Action Partnership Plan (LAPP)

The Live Action Partnership Plan (LAPP) is a continuously updated partnership improvement plan. Actions are normally determined at the Partnership Development Meeting (PDM), resulting from the pro-active review of quality monitoring data; however, as a ‘live’ document, actions can be added at any time.

The template for the Live Action Partnership Plan (LAPP) is shown in appendix 4 of the Partnership Oversight and Development Handbook.

Actions must be discussed and agreed by all parties in the partnership and may result in improvement action either at the University or at the Partner Institution.

It is the responsibility of the University Senior/Academic Partnership Manager/Partnership Lead (SPM/APM/PL) to keep the Live Action Partnership Plan (LAPP) up to date, as actions are completed and signed off at the PDM or new actions generated. The Partner Overview Form (POF), which summarises the operation of a partnership, is an adjunct to the Live Action Partnership Plan (LAPP). The LAPP feeds into the Off Campus Division Quality Enhancement Plan and Annual Review, which is written by the Dean.

The Off Campus Division Quality Enhancement Plan and Annual Review contains two sections:

* **Part 1 is a metrics-based quality monitoring review** of partnership operations including an action plan, based on exception reporting from partnership quantitative KPI data.
* **Part 2 contains a narrative risk report** on themes emerging from analyses of partnership data in Part 1, responding to the OfS General Ongoing Conditions of Registration (‘B’ conditions). Part 2 also contains monitoring and evaluation of Off Campus Division strategic aims for the period including consideration of partnership commercial viability.

# Stage 3: Subject Quality Enhancement Plan

A **Subject** **Quality Enhancement Plan** (SQEP) is required for each of the following subject groupings, using the Common Aggregation Hierarchy, level 2 (CAH-02) (modified in 2023), based on HECOS codes for programmes.

From **Monday, 6th November, 2023**, Academic Coordinators (SELE), Deans and Heads may access the Annual Course Monitoring data reports for each subject (HECOS CAH-02 level) and Off Campus partner organisation (NEW in 2023) at the following open-access location:

**L:\Corporate Intelligence\Annual Quality Monitoring\Nov-2023.**

|  |  |  |  |
| --- | --- | --- | --- |
| **CAH-02 code** | **CAH-02 Subject** | **School which owns the programmes in the Subjects** | **Subject Lead and SQEP author** |
| CAH02-04 | **Nursing and Midwifery** | Nursing and Midwifery / Health | ACs SELE (x2), School of Nursing and Midwifery |
| AC SELE, Education and Psychology |
| CAH02-05 | **Medical Sciences** | Clinical and Biomedical Sciences | AC SELE, Clinical and Biomedical Sciences |
| CAH02-06 | **Allied Health** | Psychology and others | ACs SELE (x2), School of Nursing and Midwifery |
| AC SELE, Education and Psychology |
| CAH03-01 | **Biosciences** | Sport and Biological Sciences | AC SELE, Clinical and Biomedical Sciences |
| CAH03-02 | **Sport and Exercise Sciences** | Sport and Biological Sciences | AC SELE, Clinical and Biomedical Sciences |
| CAH04-01 | **Psychology** | Psychology | AC SELE, Education and Psychology |
| CAH10-01 | **Engineering** | Engineering | AC SELE, Engineering |
| AC SELE, Clinical and Biomedical Sciences |
| CAH11-01 | **Computing** | Creative Tech | AC SELE, Creative Tech |
| CAH13-01 | **Architecture, Building and Planning** | Engineering | AC SELE, Engineering |
| CAH15-01 | **Sociology, Social Policy and Anthropology** | CCJ/Criminology and Forensic | AC SELE, Education and Psychology |
| AC SELE, GMBS |
| CAH15-04 | **Health and Social Care** | Health | AC SELE, Health and Society |
| CAH16-01 | **Law** | Law and Business | AC SELE, GMBS |
| CAH17-01 | **Business and Management** | IoM | AC SELE, GMBS |
| CAH19-01 | **English Studies** | Arts and Education | AC SELE, Arts |
| CAH22-01 | **Education and Teaching** | Education | AC SELE, Education and Psychology |
| CAH24-01 | **Media, Journalism and Communications** | Creative Tech and Arts | AC SELE, Arts |
| CAH25-01 | **Creative Arts and Design** | Arts | AC SELE, Arts |
| CAH25-02 | **Performing Arts** | Off Campus for SOA | Head of School, OffCD |

The Deans have nominated the above Subject Quality Enhancement Plan (SQEP) authors. SQEP authors write the SQEP for the Subject, covering the programmes contained in the CAH-02 level subject groupings detailed in the table above. There are several subject areas where the same author has been identified and where it would be possible for one document to be written as long as it covers all programmes listed for the constituent subject groupings (please consult the Academic Registrar[[9]](#footnote-9) on operational arrangements).

## The purpose of the Subject Quality Enhancement Plan

The Subject Quality Enhancement Plan (SQEP) evaluates the current healthof the subject and its constituent on and off campus programmes. From analyses of performance data for the subject and each on and off campus programme, it identifies any required improvements and the action to be taken to secure that improvement.

The SQEP is intended to distil good practice and areas for improvement that affect the Subject as a whole. The SQEP brings together the quality planning process for the Subject and informs the local academic plan for the Subject. It should make explicit reference to University strategic priorities such as TIRI, Teaching Excellence, and GAME, amongst others.

To evaluate performance the author(s) of the SQEP uses the Report(s) from the External Examiner(s) plus data, as indicated above, from the Annual Course Monitoring Reports provided by Student Data Management (SDM) for the following metrics:

**Core metrics:**

1. Teaching on my course (NSS)
2. Assessment and feedback (NSS)
3. Academic support (NSS)
4. Course Continuation (from entry to next level) (introduced 2022)
5. Course Completion (using the cohort tracking method) (introduced 2022)
6. Progression (progression to graduate level employment and/or further study, 15 months after completion of study) (introduced 2022)

**University Key Performance Indicators (KPIs):**

1. Applications (number) (UNIPULSE)
2. Conversion Rate (% applications to enrolment) (UNIPULSE)
3. Enrolments (number) (UNIPULSE)
4. Attendance 2 (%) (UNIPULSE) (NEW in 2023)[[10]](#footnote-10)
5. Average Module Mark (mean %) (UNIPULSE)
6. Modules passed first time (%) (UNIPULSE)
7. Achievement of ‘Good Honours’ Degrees (% gaining first and upper second) (UNIPULSE)

**APP Related Access Metrics: Proportion of New UK Enrolments for Under-Represented Demographic Groups**

1. Number of students enrolling: New UK enrolments (N)
2. Proportion of students who are Male (%)
3. Proportion of students who are Female (%)
4. Proportion of students who report that they have a disability: Disabled (%)
5. Proportion of students who are from a Black, Asian, or other Minority Ethnic background: BAME (%)
6. Proportion of students who are Mature (%)
7. Proportion of students who are from Polar4 Quintile (%)
8. Proportion of students who are from IMD Quintile (%)

**APP Related Metrics for the selected Target Demographic Groups:**

* APP Gaps 1-4: Attainment gap metrics for target Demographic Groups:
	1. The attainment gap between POLAR4 Quintile 1 and Quintile 5 for full time undergraduate students
	2. The attainment gap between IMD Quintile 1 and Quintile 5 for full time undergraduate students
	3. The attainment gap between full time undergraduate Black students and White students
	4. The attainment gap between full time undergraduate Asian students and White students
* Continuation Gaps for Target Demographic Groups
1. The continuation gap between full time undergraduate Black students and White students
2. The continuation gap between full time undergraduate Asian students and White students
3. The continuation gap between full time undergraduate Mixed Ethnicity students and White students
* Progression Gaps for Target Demographic Groups (2020/21 leavers[[11]](#footnote-11))
1. The progression gap between part time undergraduate IMD Quintile 1 and Quintile 5 students
2. The progression gap between full time undergraduate Asian and White students

## Completing the Subject Quality Enhancement Plan

Academic Coordinators (SELE) are asked to:

1. download the *Annual Data Monitoring Reports* for the relevant Subject(s) – on or after **6th November 2023.** The data will be provided by Student Data Management (SDM) by the census date of **6th November 2023** and the data will be colour coded to show whether performance met the required benchmark (green), or did not meet the required benchmark (red).
2. analyse the data report about the preceding year’s performance and insert the narrative and action plan into the template to create each SQEP.
3. use **exception reporting** to identify **only** the Core Metrics, University KPIs and APP Related Metrics where the performance value **does** **not** meet the necessarybenchmark. In this way you have identified the **areas for improvement** (AFIs).
4. Consult the Link Tutor for commentary on partnership performance. The Link Tutor supports the partner Course Manager to complete the Programme Plan, is the principal academic link with the faculty, and provides monitoring throughout the year in the form of Link Tutor reports reviewed at the Partnership Development Meetings (PDMs). The Link Tutor is best placed to provide academic context where partners have not met benchmarks. Via the Link Tutor, the Off Campus Division Senior Partnership Manager/Academic Partnership Manager/Partnership Lead (SPM/APM/PL) will provide contextual information where required.
5. Use the outline for an action plan given in the SQEP template (form AM2) to create an Action Plan to identify good practice and enable relevant role holders to resolve **areas for improvement**,in a timely way. The outline for an action plan references the Core Practices for Standards and Quality of all higher education that are set by the Revised UK Quality Code (details of the Core Practices are included within the SQEP template).
6. ensure that the Sample Annual Monitoring Report (Appendix 1) is deleted before submission.
7. submit the completed SQEP to the Academic Registrar[[12]](#footnote-12) **by Friday, 12th January, 2024**.

## Writing the Subject Quality Enhancement Plan

The author of the SQEP requires the following items:

1. The template for the Subject Quality Enhancement Plan (form AM2)
2. The *Annual Data Monitoring Reports* for the relevant Subjects from SDM[[13]](#footnote-13) comprising performance data the Core Metrics, University KPIs and APP Related Metrics. A sample Subject Annual Monitoring Report (containing dummy data) is given in form AM2.
3. The Programme Plans for all on campus programmes within the Subject.
4. A copy of all Programme Plans from partner organisations within the subject and a list of relevant partnership Link Tutors to consult, for exception reporting, ( i.e. where benchmarks have not been met).
5. **Views of Employers/ Professionals about the subject.** A summary of comments received from employers or the profession and relevant outputs from meetings the Industry Advisory Board that about the subject.
6. **Research Informed delivery.** A summary of ways in which research outputs from research activities of the staff team have impact on the subject.
7. Evidence about how well the Subject’s provision has met the following University requirements:
	1. Teaching Intensive and Research Informed (see 6 above)
	2. Graduate Attributes Matrix for Employability
	3. Diverse assessment methods and student-centred pedagogy;
	4. Developed digital literacy; employability and enterprise; Teaching Excellence.

The author of an Apprenticeship Self-Assessment Report requires the following additional items:

1. Apprentice Employer’s views captured in a variety of ways, e.g. through Apprentice’s Reviews, feedback from the FE Choices Employer Survey and Industry Advisory Boards, as appropriate. Response and comment in the **SQIP**.
2. Self-assessed judgements against the Education Inspection Framework (Apprenticeship Programmes only). Evidence to support a judgement grade 2.

## Annual Data Monitoring Reports

The report will contain details of the Subject’s performance against each of the Core Metrics and University KPIs, listed above. The report will be pre-populated by SDM and present data for all programmes in the subject. The performance data for individual programmes will be colour coded to show whether it meets the required benchmark or not, as follows:

* **green data** to show that the **benchmark** has been achieved
* **red data** to show that the **benchmark** has NOT been achieved

## A note about the benchmarks for the Core Metrics at Subject level

This year, as shown in the list below, **the benchmarks vary by CAH-02 level Subject** for each of the OfS Core Metrics:

1. Continuation (from entry to next level)
2. Completion (using the cohort tracking method)
3. Progression (to graduate level employment and/or further study, 15 months after completion of study)

The CAH-02 Subject level benchmarks are listed below and these will be embedded in the data provided in the Annual Monitoring Reports issued by SDM for each CAH-02 level Subject.

## Benchmarks for Core Metrics at Subject level

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **CAH2 code** | **CAH2 Subject** | **NSS Teaching on my course** | **NSS Assessment and feedback** | **NSS Academic Support** | **Course Continuation** | **Course Completion** | **Progression** |
| **University** | **Default for other subjects not listed** | **85.9%** | **81.6%** | **82.3%** | **84.4%** | **80.6%** | **71.1%** |
| CAH02-04 | nursing and midwifery | 85.2% | 80.9% | 75.6% | 88.1% | 86.7% | 89.1% |
| CAH02-05 | medical sciences | 85.9% | 81.6% | 82.3% | 84.4% | 80.6% | 71.1% |
| CAH02-06 | allied health | 84.5% | 76.6% | 78.9% | 88.9% | 83.6% | 76.8% |
| CAH03-01 | biosciences | 90.1% | 77.2% | 87.1% | 86.8% | 80.2% | 71.1% |
| CAH03-02 | sport and exercise sciences | 89.7% | 85.2% | 88.6% | 80.8% | 75.2% | 65.7% |
| CAH04-01 | psychology | 85.1% | 77.3% | 80.2% | 85.4% | 81.4% | 57.8% |
| CAH10-01 | engineering | 82.3% | 76.4% | 83.8% | 85.6% | 78.8% | 72.4% |
| CAH11-01 | computing | 81.2% | 78.0% | 82.8% | 82.9% | 73.9% | 72.9% |
| CAH13-01 | architecture, building and planning | 85.9% | 81.6% | 82.3% | 82.9% | 78.8% | 71.1% |
| CAH15-01 | sociology, social policy and anthropology | 83.5% | 78.7% | 81.5% | 83.0% | 80.6% | 58.6% |
| CAH15-04 | health and social care | 91.1% | 87.4% | 85.5% | 80.6% | 81.1% | 60.4% |
| CAH16-01 | law | 88.5% | 78.7% | 82.4% | 85.0% | 78.8% | 64.6% |
| CAH17-01 | business and management | 86.9% | 83.8% | 86.2% | 80.8% | 75.2% | 57.3% |
| CAH19-01 | English studies | 93.2% | 85.2% | 92.1% | 87.2% | 83.6% | 63.7% |
| CAH22-01 | education and teaching | 85.5% | 82.6% | 85.0% | 85.2% | 85.9% | 69.8% |
| CAH24-01 | media, journalism and communications | 84.6% | 82.8% | 88.5% | 86.8% | 79.6% | 62.9% |
| CAH25-01 | creative arts and design | 83.7% | 82.8% | 84.9% | 87.7% | 83.3% | 62.2% |
| CAH25-02 | performing arts | 85.9% | 81.6% | 82.3% | 88.9% | 85.0% | 62.0% |

## Exception Reporting

It is **essential to comment** in the SQEP on performance in the Core Metrics or University KPIs which **DOES NOT MEET** the required benchmarks (**red** items). Such items must appear in the Action Plan within the SQEP. There is **no need to comment** in the SQEP on values for a Core Metric or University KPI which **MEET** the required benchmark (**green**).

## Discussion of SQEP with staff and students

Once written, the author should disseminate the draft SQEP as follows:

1. The author sends the Draft SQEP to the Academic Registrar **by Friday, 12th January, 2024**, to inform the University Quality Enhancement Plan.
2. The first School Board of the academic year (December 2023/January 2024) should consider and endorse the Draft SQEP for onward transmission to Education Committee.
3. The author should present the **confirmed** SQEP to Education Committee at the meeting in March 2023 and upload it onto the Quality Portal on Moodle.

Note that, in 2023/24 and for the third time, there is no need to include the Annual Data Monitoring Reports in the submission to Education Committee. The Committee will be provided with online access to these reports.

## Subject Quality Improvement Plan for Apprenticeships

The Director of Apprenticeships and their team can advise on the preparation of the Subject Quality Improvement Plan.

# Stage 4: University Quality Enhancement Plan

## The purpose of the University Quality Enhancement Plan

The Standards and Enhancement Office produces the University Quality Enhancement Plan (UQEP). The UQEP is intended to distil good practice and areas for improvement that affect the University as a whole. It provides oversight of how well academic standards have been set and maintained and how well the quality of the students’ educational experience has been managed across the University. From analyses of performance data for the University and subject, it identifies any required improvements and the action to be taken to secure that improvement. The UQEP is presented to Education Committee and Senate annually and is incorporated into the University planning cycle.

To evaluate performance the author(s) of the UQEP uses the Overview of the Report(s) from the External Examiner(s) plus data for the following metrics:

**Core metrics:**

1. Teaching on my course (NSS)
2. Assessment and feedback (NSS)
3. Academic support (NSS)
4. Continuation (from entry to next level) (introduced 2022)
5. Completion (using the cohort tracking method) (introduced 2022)
6. Progression (progression to graduate level employment and/or further study, 15 months after completion of study) (introduced 2022)

**University Key Performance Indicators (KPIs):**

1. Applications (number) (UNIPULSE)
2. Conversion Rate (% applications to enrolment) (UNIPULSE)
3. Enrolments (number) (UNIPULSE)
4. Attendance (%) (UNIPULSE) (CHANGED for 2023)[[14]](#footnote-14)
5. Average Module Mark (mean %) (UNIPULSE)
6. Modules passed first time (%) (UNIPULSE)
7. Achievement of ‘Good Honours’ Degrees (% gaining first and upper second) (UNIPULSE)

**APP Related Access Metrics: Proportion of New UK Enrolments for Under-Represented Demographic Groups**

1. Number of students enrolling: New UK enrolments (N)
2. Proportion of students who are Male (%)
3. Proportion of students who are Female (%)
4. Proportion of students who report that they have a disability: Disabled (%)
5. Proportion of students who are from a Black, Asian, or other Minority Ethnic background: BAME (%)
6. Proportion of students who are Mature (%)
7. Proportion of students who are from Polar4 Quintile (%)
8. Proportion of students who are from IMD Quintile (%)

**APP Related Metrics for the selected Target Demographic Groups:**

* APP Gaps 1-4: Attainment gap metrics for target Demographic Groups:
	1. The attainment gap between POLAR4 Quintile 1 and Quintile 5 for full time undergraduate students
	2. The attainment gap between IMD Quintile 1 and Quintile 5 for full time undergraduate students
	3. The attainment gap between full time undergraduate Black students and White students
	4. The attainment gap between full time undergraduate Asian students and White students
* Continuation Gaps for Target Demographic Groups
1. The continuation gap between full time undergraduate Black students and White students
2. The continuation gap between full time undergraduate Asian students and White students
3. The continuation gap between full time undergraduate Mixed Ethnicity students and White students
* Progression Gaps for Target Demographic Groups (2020/21 leavers[[15]](#footnote-15))
1. The progression gap between part time undergraduate IMD Quintile 1 and Quintile 5 students
2. The progression gap between full time undergraduate Asian and White students

## Steps to complete the University Quality Enhancement Plan

1. Use the University level Annual Monitoring Report from SDM to **analyse** data for Core Metrics and University KPIs against national and University benchmarks. The data will be captured and published by Student Data Management (SDM) on the census date of **6th November 2023** and the data will be colour coded to show whether performance met (Green) or did not meet required benchmarks (Red);
2. use **exception reporting** to identify **ONLY** the Core Metrics and University KPIs where the performance value does **not** meet the necessary **benchmark**. In this way the author can identify the **areas for improvement**;
3. Use the outline for an action plan given in the UQEP template to create an Action Plan to identify good practice and enable relevant role holders to resolve **areas for improvement**,in a timely way. The outline for an action plan references the Core Practices for Standards and Quality of all higher education that are set by the UK Quality Code.

## Writing the UQEP

The author(s) require(s) a range of sources of evidence including the following items:

1. The template for the University Quality Enhancement Plan;
2. The University level *Annual Data Monitoring Report* about2022-23 from SDM comprising performance data the Core Metrics and University KPIs;
3. The SQEP for all Subjects within the University;
4. The Overview of the Reports of External Examiners and that of the ISEE and D-ISEE;
5. The University Self-Assessment Report and Quality Improvement Plan for Apprenticeships.(NEW in 2023)
6. The Off Campus Division Quality Enhancement Plan and Annual Review (NEW in 2023)

## University Annual Data Monitoring Report about 2022-23

The report will contain details of the University’s performance against each of the Core Metrics and University KPIs, listed above. The data report will be pre-populated by SDM and present data for all subjects in the University. The performance data for the University and individual subjects will be colour coded to show required benchmarks are met or not, as follows:

* **green data** to show that the **benchmark** has been achieved
* **red data** to show that the **benchmark** has NOT been achieved

It is essential to **comment** in the UQEP on performance in the Core Metrics or University KPIs which **DOES NOT MEET** the required benchmark (**red**). Such items must appear in the Action Plan within the UQEP. There is **no need to comment** in the UQEP on values for the Core Metric or University KPI which **MEET** the required benchmark (**green**).

## Discussion of UQEP with staff and students

Once the UQEP has been written, it should be disseminated, as follows:

1. The UQEP should be presented to the third meeting of Education Committee for consideration.
2. Once endorsed by Education Committee, the confirmed UQEP should be forwarded for consideration at the third meeting of Senate.

|  |
| --- |
| **ANNUAL MONITORING GUIDELINES FOR 2023-24** |
| Policy ref: tbc |
| Version number | Updated October 2023 |
| Version date | October 2023 |
| Role of Developer/Reviewer | Academic Registrar |
| Policy Owner (Group/ Centre/Unit) | Standards and Enhancement Office |
| Person responsible for implementation (post-holder) | Acting Academic Registrar |
| Approving Committee/ Board | Education Committee |
| Date approved | 8 June 2016 |
| Effective from | September 2016 |
| Dissemination method (e.g. website) | SEO web pages; staff briefing and sessions; one to one guidance. |
| Review frequency | Annual updating |
| Reviewing Committee | Education Committee |
| Consultation history (individuals/groups consulted and dates) | Piloted in 2015-16; Further developed in consultation with EDMCI and CI&DIM; ACs and HoS in August 2016. OfS Core Metrics and benchmarks incorporated Sep-18. Technical updates occur annually. |
| Document history (e.g. rationale and dates of previous amendments) | Introduction of metrics based annual monitoring, Sept-16. Extended to include gap analyses in Sep-20. Extended to include Partner overviews and OffCD overviews in 2022-23. |

1. In 2022-23, OfS changed the way benchmarks are to be indicated. For ease, in providing annual monitoring data reports SDM is providing an aggregated benchmark per metric using the proportion of students in respective categories or ‘splits’. [↑](#footnote-ref-1)
2. In previous years the methodology for Attendance (%) disregarded missing register marks when calculating overall attendance. From this year, Attendance (%) regards missing marks as equivalent to an absent mark. The move will significantly improve the accuracy of reporting. The old metric ignoring missing marks remains available in UNIPULSE for contextual use, but no longer contributes to Annual Monitoring. [↑](#footnote-ref-2)
3. This uses information about Graduate Outcomes. [↑](#footnote-ref-3)
4. [**UNIPULSE**](http://reports.bolton.ac.uk/Docs/Pages/Report.aspx?ItemPath=%2fReporting+General%2fPULSE%2fUNIPULSE%2f10+-+Report+Selector&ViewMode=Detail) Reports for Programme Plans and Pre-populated Tables of Data for QEPs [↑](#footnote-ref-4)
5. Template available from Head of Apprenticeship Development [↑](#footnote-ref-5)
6. A Programme Plan is required for each off campus programme and this is written by the Partner’s Course Manager supported by the Link Tutor from the UoB School that owns the programme. [↑](#footnote-ref-6)
7. The Census period is to ensure that data used in Programme Plans, SQEPs and the UQEP corresponds, as it will be captured during the same period. [↑](#footnote-ref-7)
8. Available from the Apprenticeships team [↑](#footnote-ref-8)
9. At the time of publication the Acting Academic Registrar is Dr Lisa Cove. [↑](#footnote-ref-9)
10. In previous years the methodology for Attendance (%) disregarded missing register marks when calculating overall attendance. From this year, Attendance (%) regards missing marks as equivalent to an absent mark. The move will significantly improve the accuracy of reporting. The old metric ignoring missing marks remains available in UNIPULSE for contextual use, but no longer contributes to Annual Monitoring. [↑](#footnote-ref-10)
11. This uses information about Graduate Outcomes. [↑](#footnote-ref-11)
12. At the time of publication the Acting Academic Registrar is Dr Lisa Cove. [↑](#footnote-ref-12)
13. SDM will provide pre-populated reports for each subject in this folder: **L:\Corporate Intelligence\Annual Quality Monitoring\Nov-2023.** [↑](#footnote-ref-13)
14. In previous years the methodology for Attendance (%) disregarded missing register marks when calculating overall attendance. From this year, Attendance (%) regards missing marks as equivalent to an absent mark. The move will significantly improve the accuracy of reporting. The old metric ignoring missing marks remains available in UNIPULSE for contextual use, but no longer contributes to Annual Monitoring. [↑](#footnote-ref-14)
15. This uses information about Graduate Outcomes. [↑](#footnote-ref-15)