

Office for
Students



Teaching Excellence and Student Outcomes Framework:

Guide to subject-level pilot data

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Purpose of this guide

1. This guide provides detailed information about the data that will be used in the second year of the subject-level pilot exercise for the Teaching Excellence and Student Outcomes Framework (TEF). It is intended as a technical reference: for full information about how the data and metrics should be used in the subject pilot, please read 'Teaching Excellence and Student Outcomes Framework: Subject-level pilot guide'¹ (hereafter referred to as 'the TEF subject-level pilot guide').
2. To allow providers to rebuild their pilot workbooks and check their accuracy, we have published full technical details of the algorithms used to derive them from the underlying data in the 'TEF subject-level pilot metrics – technical document'². The 'TEF subject-level pilot metrics – technical document' will hereafter be referred to as 'the TEF metrics technical document'. Full descriptions of each metric are included at Annex B of this document.
3. As well as setting out full data specifications, this guide illustrates how the data will be presented to higher education providers and their students to support submission writing, and to panel members to support assessment of performance.
4. Information in this guide is not applicable to providers intending to apply for a Year Four TEF award. The data specifications used in the subject-level pilot differ significantly from the data specifications used in Year Four provider-level TEF. Further information about Year Four provider-level specifications can be found in the 'Teaching Excellence and Student Outcomes Framework Year Four procedural guidance'³.
5. This document does not represent final policy or design decisions for the implementation of subject-level TEF, which will take place over academic years 2019-20 and 2020-21.
6. Particular guidance related to the subject-pilot's assessment of provider-level provision will be indicated by a mauve border in the left margin.
7. Particular guidance related to the subject-pilot's assessment of subjects will be indicated by a green border in the left margin.

OfS privacy notice

8. The Office for Students (OfS) is required to protect the personal information of current and former students, and is committed to being clear about what information we hold and how we use it. We process personal information to enable us to fulfil our public tasks, including our responsibilities as the lead regulator for higher education in England. Data protection legislation (such as the General Data Protection Regulation) imposes strict conditions on the

¹ See www.officeforstudents.org.uk/advice-and-guidance/teaching/subject-level-pilot-year-two-2018-19/.

² This document will become available at www.officeforstudents.org.uk/advice-and-guidance/teaching/subject-level-pilot-2018-19/further-technical-guidance in early November 2018.

³ See www.officeforstudents.org.uk/advice-and-guidance/teaching/tef-year-four/.

processing of personal information. Our privacy notice⁴ sets out how we meet these conditions, including the legal basis for processing personal information, our information security arrangements, and an individual's rights in relation to the personal data the OfS may hold about them.

Data sharing responsibilities

9. The OfS is designated as a producer of official statistics, and complies with the UK Statistics Authority's code of practice for statistics. This requires the OfS to conform to a number of principles around the way it shares data with providers. It also places responsibilities on providers around the way they handle data that is shared with them. For example, providers are required to strictly limit internal sharing of the data prior to its publication, and are required to keep records of the individuals that have been granted access to the data. Further details of how these principles apply to this year's pilot are set out in paragraphs 141-145.

Data sources

10. There is a rich data landscape in UK higher education, developed by the UK sector and its regulators and stakeholders over many years, which has been an integral tool in maintaining standards and improving quality. The TEF draws on relevant parts of this existing, nationally collected data, and presents it in ways which best indicate performance against TEF criteria.
11. UK higher education providers submit data to the Higher Education Statistics Agency (HESA) through the HESA student record (for publicly funded universities and some colleges, and private higher education providers) and the individualised learner record (ILR) for English further education and sixth form colleges every year.
12. The HESA student record⁵ and the ILR are the base datasets for TEF metrics. These records provide data about the characteristics of students, and the courses and providers they are registered with. All students are assigned a unique identifier within their HESA or ILR record, which can facilitate accurate tracking of students throughout their higher education experience. It also allows other data collected about the student throughout their studies to be matched to their individual record.
13. Some metrics link the student records data to responses to the National Student Survey (NSS) and the Destinations of Leavers from Higher Education (DLHE) survey. The other core metrics use the Longitudinal Education Outcomes (LEO) dataset, which links student record data with graduates' tax and benefits data held by HM Revenue & Customs (HMRC) and the Department for Work and Pensions (DWP).
14. The OfS will calculate the TEF metrics from this data and create individual TEF metrics Excel workbooks for each provider as a whole and for each of its subjects.

⁴ See www.officeforstudents.org.uk/privacy/.

⁵ All references to HESA student records throughout this document should be read as inclusive of HESA student records returned by alternative providers in England.

Which students are counted

15. For all of the data and metrics used in the TEF pilot, all providers and students in scope for the TEF and for the data or metric in question are selected from the data sources mentioned in paragraphs 12 and 13. Where the data source has a wider scope than the TEF (for example, the DLHE includes postgraduate students), those outside the scope of the TEF are excluded from this selection. Unless otherwise stated, calculations are based on student headcount⁶. All TEF data and metrics will be reported separately for full-time and part-time students.
16. For the purposes of TEF, the quality of provision will be assessed at the provider that delivers the teaching. This may or may not be the provider that awards the qualification or registers the student. Where there is a difference, students will be included in the data for the teaching provider rather than the registering provider. Normally, the teaching provider is the provider where the student spends the majority of their first two years.
17. A student's teaching provider is identified on the basis of where the student is taught in the majority of the first two years. If there is no majority, the student is considered to be taught at the registering provider. This approach differs to previous years of TEF metrics (where the teaching provider was the provider where the student spends the majority of their first year). This change aims to improve the identification of the teaching provider for students undertaking foundation years or similar provision where a subcontractual partner provider is delivering only a minority of the overall higher education experience.

Defining subjects – CAH2 subject classifications

18. The subjects assessed in the subject-level pilot are based on the HESA Common Aggregation Hierarchy at level 2 (CAH2). In this year's pilot, an amended version of the CAH2 will be tested, based on feedback from the previous year of pilots. In parallel with this year's pilot the OfS will work with HESA and other stakeholders to confirm changes to the published CAH structure⁷ during 2019. See Annex A of the 'TEF subject-level pilot guide'⁸ for the version of CAH2 to be tested in this year's pilot.
19. HESA has developed the CAH in such a way that it can be applied to both Higher Education Classification of Subjects (HECoS) and JACS subjects. To identify the subject areas that an individual student is studying, the OfS will consider the programme-level JACS⁹ codes that the provider has assigned for that student, and use HESA's JACS to CAH mapping to match these to the appropriate CAH3 subjects. Where multiple JACS codes have been assigned to a programme, the student data is apportioned between the different subjects in line with the

⁶ Student headcount is measured by full-person equivalence (FPE). Full technical descriptions are included in the TEF metrics technical document.

⁷ Further information on the development of the new HECoS and the CAH is available at www.hesa.ac.uk/innovation/hecos.

⁸ See www.officeforstudents.org.uk/advice-and-guidance/teaching/subject-level-pilot-year-two-2018-19/.

⁹ For providers returning data to the Education and Skills Funding Agency's ILR, the Learn Direct classification codes assigned to the student's learning aim are first mapped by the OfS to their equivalents in the JACS classification.

ratios recorded in the data. The CAH structure can then be used to attribute the student to the relevant amended CAH2 subjects.

20. A single student that is attributed to multiple CAH2 subjects will contribute to the subject pilot data for each of those subjects: their contribution to each subject area will be weighted pro rata to the proportional course distribution identified by the provider in the student data return. For example, if a biochemistry course has been identified as 60 per cent in biosciences and 40 per cent in chemistry, this would mean that a biochemistry student who continues in higher education in the year after beginning their course counts positively towards the continuation metrics for each of the two subjects, weighted as 0.6 in the numerator and denominator of the biosciences subject, and as 0.4 in the numerator and denominator of the chemistry subject.
21. This approach will apply to allocation of a student's subject areas across the calculation of all of the TEF pilot data: for core and split metrics at provider and subject level, as well as in the supplementary data and contextual data. The approach to assessment of provision which spans multiple CAH2 categories is outlined in the 'Interdisciplinary provision' section, paragraphs 81-93 of the 'TEF subject-level pilot guide'¹⁰.

Majority mode of delivery

22. All core metrics and supplementary TEF data, along with all of the contextual data, will be reported separately for full-time and part-time students. The majority mode of delivery will be identified separately for each subject, as well as for the whole provider, and is shown in the corresponding metrics workbook.
23. The majority mode information plays an important role. It is used to determine eligibility of providers and subjects for TEF assessment, it influences submission options and the steps required within the assessment process, and it is used to determine the Step 1a metrics-based starting point for the initial hypothesis.
24. The majority mode will be calculated on the basis of the full-time and part-time student headcounts, averaged over the same period and number of years used for the provider's contextual data (see paragraphs 26-33). Where the headcount of full-time students is greater than or equal to the headcount of part-time students, the majority mode will be identified as full-time, and the minority mode as part-time. Otherwise, the majority mode will be part-time (and the minority mode is full-time).
25. A provider or subject that has more than 35 per cent of students by headcount in its minority mode will be determined as having a similar number of students in both delivery modes. If this similarity exists for a provider, it will be clearly indicated on the metrics workbook. Where at least 35 per cent of students are part-time, the provider will have the opportunity to submit an additional page of quantitative information alongside its provider-level submission, and will be subject to the variant assessment process (see paragraphs 264-265 of the 'TEF subject-level pilot guide'¹¹). This additional page will not apply to subject submissions.

¹⁰ See www.officeforstudents.org.uk/advice-and-guidance/teaching/subject-level-pilot-year-two-2018-19/.

¹¹ Ibid.

Contextual data

26. Contextual information will be provided to support panel members' interpretation of metrics and performance, but does not itself form the basis of any judgement. It allows panel members to take into account the specific context in which the provider is operating – for example, considering employment or destination outcomes in the context of employment statistics for the geographical area, or student success in the context of the student population studying at the provider. A full list of contextual information that will be produced by the OfS is shown in Table 2 below.
27. This section provides technical descriptions of the contextual data which is produced centrally by OfS. Centrally produced contextual data forms one part of the contextual information that will be available to support provider- and subject-level assessments in the pilot. Providers can include additional contextual information in their submissions.
28. The OfS will make the contextual data about providers and subjects available to providers, along with their metrics, at the beginning of the submission window.

Contextual data about the students and subjects or courses covered

29. The contextual data about each provider and subject report the numbers or distributions of students in each category of student, subject or course, as shown in Table 1.
30. Unless otherwise stated, the number of students will be shown as annual averages, where the average is calculated across the three most recent years of available data¹², and based on student headcount. Where fewer than three years of data exist in this period, the contextual data will be shown as an average across the available years of data within the three most recently available instead¹³.
31. At provider level the numbers are based on the overall cohort of students in each category who study at the provider (including new entrants, continuing students and final year graduates from each of the available years).
32. At subject level the numbers are based on the cohort of students who study the relevant subject at the provider. Because the number of available years of data for a subject may be lower than the number available for the provider as a whole, the subject headcounts shown in the provider-level metrics workbooks may be lower than the equivalents shown in the subject-level metrics workbook, including when split by mode. For example, the contextual data for the provider as a whole may be averaged across three years of data, while a subject that has been more recently introduced may have contextual data that has been averaged across only one or two years of data.

¹² For this subject pilot, the contextual data is calculated using data for academic years 2014-15, 2015-16 and 2016-17.

¹³ Availability of data in any given year is determined at the overall cohort level, rather than being mode-specific. For example, if a provider has two years of part-time data and three years of full-time data, both sets of contextual data will be shown as the average of the last three years.

33. An exemplar workbook illustrating how this information will be presented will be available on the OfS website¹⁴.

Table 1: Contextual data definitions and categories

Contextual data	Description and coverage	Categories
Overall student numbers	Overall total student numbers.	Total, reported based on the annual average student headcount as well as the student full-time equivalence (FTE)
Entrants (Subject level)	Number of entrants in each of the three most recent years. (Note this is not the annual average but is the number of students per year.)	Reported separately for 2014-15, 2015-16 and 2016-17
Qualifiers (Subject level)	Number of qualifiers in each of the three most recent years. (Note this is not the annual average but is the number of students per year.)	Reported separately for 2014-15, 2015-16 and 2016-17
Proportion of provision within a subject that spans multiple CAH2 subjects (Subject level)	The proportion of students studying a programme that sits entirely within the CAH2 subject being assessed, compared with the proportion of students within the subject whose programmes span multiple CAH2 subjects.	Spans multiple CAH2 subjects Within a single CAH2 subject
Level of study	Level of the programme a student is registered on.	First degree, Other undergraduate, Programmes at the undergraduate-postgraduate boundary
Age	Age at start of study.	Under 21, 21 to 25, 26 to 30, 31 to 40, 41 to 50, over 50
Ethnicity	Ethnicity as self-declared on HESA or ILR student records.	White, Black, Asian, Other, Unknown
Sex	Sex as self-declared on HESA or ILR student records.	Male, Female, Neither male or female

¹⁴ See www.officeforstudents.org.uk/advice-and-guidance/teaching/subject-level-pilot-2018-19/further-technical-guidance.

Contextual data	Description and coverage	Categories
Disability	Disability as self-declared on HESA or ILR student records.	Disabled, Not disabled
Entry qualifications	Detailed qualifications on entry from HESA or ILR student records, and for students at further education colleges, records from the Linked National Pupil Database.	Higher education-level High (over 390), medium (280 to 390) or low tariff (under 280) Non-tariff Non-UK
Domicile	Domicile as self-declared on HESA or ILR student records.	England, Northern Ireland, Scotland, Wales, Other EU, Non-EU
POLAR4 (quintiles)	Applies to UK-domiciled students aged under 21 only. The Participation of Local Areas (POLAR) ¹⁵ classification is used as a measure of educational disadvantage.	Quintiles 1 (most under-represented), 2, 3, 4, 5 (least under-represented)
National Index of Multiple Deprivation (IMD, quintiles): EIMD	Providers in England only. Applies to students domiciled in England only. The English Indices of Multiple Deprivation (EIMD) 2015 ¹⁶ identifies small-area concentrations of multiple deprivation across England.	Quintiles 1 (most deprived), 2, 3, 4, 5 (least deprived)
National IMD (quintiles): NI MDM	Providers in Northern Ireland only. Applies to students domiciled in Northern Ireland only. The Northern Ireland Multiple Deprivation Measure (NIMDM) 2017 ¹⁷ identifies small-area concentrations of multiple deprivation across Northern Ireland.	Quintiles 1 (most deprived), 2, 3, 4, 5 (least deprived)

¹⁵ The POLAR classification groups areas across the UK based on the proportion of the young population that participates in higher education, where quintile 1 areas have the lowest participation rates, and quintile 5 the highest. For more information see www.officeforstudents.org.uk/data-and-analysis/polar-participation-of-local-areas/.

¹⁶ This relates to the year the classification was published. The classification is then applied to the three most recently available years of data.

¹⁷ Ibid.

Contextual data	Description and coverage	Categories
National IMD (quintiles): SIMD	Providers in Scotland only. Applies to students domiciled in Scotland only. The Scottish Index of Multiple Deprivation (SIMD) 2016 ¹⁸ identifies small-area concentrations of multiple deprivation across Scotland.	Quintiles 1 (most deprived), 2, 3, 4, 5 (least deprived)
National IMD (quintiles): WIMD	Providers in Wales only. Applies to students domiciled in Wales only. The Welsh Index of Multiple Deprivation (WIMD) 2014 ¹⁹ identifies small-area concentrations of multiple deprivation across Wales.	Quintiles 1 (most deprived), 2, 3, 4, 5 (least deprived)
Distance from domicile quintile	Across the sector, all UK-domiciled students whose distances travelled between their home address (before study) and the provider have been ranked from smallest to largest, which are categorised into quintiles.	Quintiles 1 (shortest distances travelled), 2, 3, 4, 5 (greatest distances travelled)
Local students	Students whose home address is within the same Travel to Work Area ²⁰ as their location of study.	Local and distance learning Not local
Distance to employment quintile	Across the sector, UK-domiciled students whose distances travelled between their provider and their subsequent employment location, based on information returned in the DLHE survey, have been ranked from smallest to largest, which are categorised into quintiles.	Quintiles 1 (shortest distances travelled), 2, 3, 4, 5 (greatest distances travelled)

¹⁸ Ibid.

¹⁹ Ibid.

²⁰ Further information on the Travel to Work Areas defined by the Office for National Statistics is available at <http://ons.maps.arcgis.com/apps/MapSeries/index.html?appid=397ccae5d5c7472e87cf0ca766386cc2>.

Contextual data	Description and coverage	Categories
Areas of highly skilled employment quintile	Across the sector, graduates whose UK location of employment is within areas which have been ranked by the proportion of graduates employed in those areas who are working in highly skilled employment, based on information returned in the DLHE survey, which are categorised into quintiles ²¹ .	Quintiles 1 (least highly skilled employment among employed graduates), 2, 3, 4, 5 (most highly skilled employment among employed graduates)
Communities First	Providers in Wales only. Applies to students domiciled in Wales only. Communities First is the Welsh government's community-focused programme tackling poverty.	Communities First Not Communities First
Welsh medium	Providers in Wales only. This measure identifies students who have accessed all or some of their provision delivered through the medium of Welsh.	More than 40 credits through the medium of Welsh for the relevant year Five to 40 credits taught through the medium of Welsh Fewer than five credits through the medium of Welsh
Subject of study (Provider level)	Based on subjects mapped to the version of level 2 of the Common Aggregation Hierarchy being used in the TEF pilot.	34 CAH2 subject groups
Subject of study (Subject level)	Based on subjects mapped to level 3 of the Common Aggregation Hierarchy.	All CAH level 3 subjects contributing to the relevant CAH2 subject
HMRC-matched students	Qualifiers who have been matched to HMRC tax records or DWP benefits records.	Matched Not matched Based on the aggregate total number of qualifiers in 2009-10, 2010-11 and 2011-12

²¹ Highly skilled employment is categorised as those jobs matched to groups 1 to 3 of the Standard Occupational Classification (SOC).

Contextual data	Description and coverage	Categories
Self-assessment tax returns	Qualifiers who have been matched to an HMRC tax record which includes a self-assessment tax return.	Self-assessed Not self-assessed Based on annual average number of qualifiers in 2009-10, 2010-11 and 2011-12
Breakdown of DLHE numerator	Students recorded positively in the DLHE-based Highly Skilled Employment metric, broken down into the percentage of students in highly skilled employment, and the percentage of students in further study at a higher level. (Note this is not the annual average but an aggregation up to three years, where DLHE data is reportable.)	Reported as an aggregate total for full-time, part-time and overall at each level of study
SIC codes of graduates (Subject level)	The industries to which the greatest proportion of a subject's students are recruited to, as defined by the Standard industrial classification of economic activities (SIC) ²² , based on information returned in the DLHE survey.	Largest 10 industries listed
Programme title (Subject level)	Programme titles mapped to the CAH2 subject covered by a subject-level workbook, and number of students studying each programme.	Programme titles mapped to the CAH2 subject in question.

Contextual maps and distributions

34. In addition to the contextual data set out in Table 1, a suite of maps will be made available at provider and subject level. These are intended to support the interpretation of recruitment, employment and graduate destination measures in particular:

- a. For each provider or subject – where students who study at the provider were based before study (using HESA and ILR data).
- b. For each provider or subject – where students who study at the provider found employment (using DLHE responses).
- c. Common to all providers, sector-level and sector-subject-level – the proportion of employed graduates in highly skilled employment (using DLHE responses).
- d. Common to all providers – the population unemployment rate (using official labour market statistics).

²² See <https://www.gov.uk/government/publications/standard-industrial-classification-of-economic-activities-sic>.

35. In addition to the information on students' pre-study domiciles and post-study employment locations presented in map form, the OfS will provide equivalent information represented as cumulative frequency distributions of the distances that students have travelled from their home address to the provider, and from the provider to their location of employment. Used in conjunction with the maps, and with the breakdown of contextual data showing domicile distance quintiles, we will test how this additional format could help contextualise the employment and destination measures, through understanding the geographical distribution of students and graduates.
36. These distributions and the three quintile measures (distance from domicile, distance to employment and areas of highly skilled employment) should be considered experimental and remain in development. They are being used in this pilot to consider whether measures of this type provide further useful context before further refinements are considered.

National-level contextual information

37. In addition to contextual data that is specific to an individual provider, panel members will also be provided with national-level data, including contextual statements that set out the broader operating context for higher education in each of the four UK nations. These will allow panel members to understand any differences, and for providers to be assured that their national operating context is understood.
38. Data will also be available based on the cohort of students who study the relevant subject across all providers at the national level, to enable panel members to understand the current disciplinary context. This data will be provided to allow panellists to consider the performance of a provider's individual subjects within the context of the performance of that subject across the entire sector. It is not intended to facilitate comparisons between subjects at sector level.

Core TEF metrics

39. The TEF draws on the nationally collected data sources outlined in paragraphs 12 and 13, to provide panel members with a common set of TEF metrics. The TEF metrics are a set of measures that are produced consistently for all providers, which are used to help assess performance in relation to each of the aspects of teaching excellence. This section will explain the data that underpins each metric, and explain how the metrics data is presented to providers and panellists.
40. The core metrics that provide evidence for TEF assessments are aligned with the different aspects of quality that TEF focuses on, as shown in Table 2. During assessment, they are first considered during Step 1, in the generation of the initial hypothesis.
41. During the calculation of the metrics-based initial hypothesis in Step 1a of assessment, the three different metric types carry different weights, as shown in Table 2. The metrics derived from the NSS carry half as much weight as those derived from LEO or the DLHE, while the continuation metric carries twice as much weight as those derived from LEO or the DLHE.

Table 2: TEF metrics aligned with aspects of quality

Aspect of quality	Metric type	Metric	Source	Weight in Step 1a calculation
Core metrics				
Teaching quality	NSS-based	Teaching on my course	NSS Q1-4	0.5
Teaching quality	NSS-based	Assessment and feedback	2016 NSS Q5-9, subsequent NSS Q8-11	0.5
Teaching quality	NSS-based	Student voice	2017 and 2018 NSS only, Q23-25	0.5
Learning environment	NSS-based	Academic support	2016 NSS Q10-12, subsequent NSS Q12-14	0.5
Learning environment	NSS-based	Learning resources	2017 and 2018 NSS only, Q18-20	0.5
Learning environment	Continuation	Continuation	HESA and ILR data	2.0
Student outcomes and learning gain	Employment	Highly skilled employment or higher study	DLHE declared activity 6 months after qualification	1.0
Student outcomes and learning gain	Employment	Sustained employment or further study	LEO 3 years after qualification	1.0
Student outcomes and learning gain	Employment	Above median earnings threshold or higher study	LEO 3 years after qualification	1.0

42. All core TEF metrics will be calculated using the latest three years²³ of available student data²⁴, and will be reported separately for full-time and part-time students. No weighting is used when aggregating the data across years. All years of NSS data are given equal weighting. To reflect the structural changes to the survey questionnaire in 2017, 'Year of data' is taken into account when benchmarking the NSS metrics (see paragraphs 71-77).

43. There are three metric 'types' which contribute to the core metrics used in the Year 4 pilots:

- a. Metrics derived from responses to the NSS.
- b. Continuation metrics, derived from linked HESA and ILR student records.

²³ The latest three years of available data varies according to the metric definition, and are prescribed within the full metrics descriptions included at Annex B.

²⁴ This includes the metrics based on the LEO dataset. Within this dataset, information on self-assessed employment and earnings has been enhanced for earlier years, making it possible to consider graduates across the three most recent years of data with the application of consistent metric definitions.

- c. Employment metrics, covering those derived from both the DLHE survey, and from the LEO dataset.

These metric types have been defined for the purpose of determining whether a subject has sufficient data to be receive a full assessment. (See paragraphs 124-129)

44. Full descriptions of each metric are included at Annex B, and in the TEF metrics technical document²⁵. Unless otherwise stated, all definitions given in this document and in technical documentation apply equally to provider-level and subject-level metrics.

Core metrics: NSS-based

45. For this pilot, five core TEF metrics are based on student responses to questions from the National Student Survey. The NSS runs in the spring of each academic year, and is targeted at all final year undergraduates in participating providers who were completing courses of more than one year duration when studied full-time. When taking the survey, students indicate their level of agreement to a range of statements²⁶.
46. In the previous year of pilots only three core metrics were drawn from the NSS. However, student feedback from this exercise identified a desire for a greater focus on issues that mattered most to students. As such, two additional question scales from the National Student Survey have been adopted for testing as core metrics in this year's pilot.
47. Within each of the five areas (or scales) used from the NSS, a student's responses to the individual questions that form that scale are aggregated to form an agreement score for each student. These scores are then averaged across all of the students who fall within the unit being assessed (the provider or the subject area) to give the average agreement to the scale. It is this figure that is shown as the TEF metric.
48. The NSS scales for student voice and learning resources will be tested in this year's pilot. The student voice scale was included in the NSS for the first time in 2017, while the learning resources scale was revised for the 2017 survey. Consequently, these metrics will be based only on the two years of NSS for which the responses have been collected consistently. The other NSS scales will continue to use three years of aggregated data.

Core metrics: continuation

49. This is a single core metric which shows the proportion of entrants in a given academic year who continue studying in UK higher education. For this year's pilot, the continuation of full-time students is assessed one calendar year after they commenced their studies, and part-time students are assessed two calendar years after they entered. Students who continue studying at higher education level at the same or at another provider, or who qualify at undergraduate or

²⁵ This document will become available at www.officeforstudents.org.uk/advice-and-guidance/teaching/subject-level-pilot-2018-19/further-technical-guidance in early November 2018.

²⁶ Full details of questions included in the survey can be found at www.officeforstudents.org.uk/advice-and-guidance/student-information-and-data/national-student-survey-nss/.

postgraduate level in the period considered, are deemed to have continued. All other students are deemed non-continuers.

50. The coverage of the continuation metric for part-time students has been extended for this pilot, and will include an assessment of the continuation of students on undergraduate qualifications other than first degrees (known as 'other undergraduate' qualifications)²⁷ for the first time.

Core metrics: employment

51. The basket of employment metrics for this year's pilot have been selected in order to anticipate changes to the metrics landscape. Utilisation of the previously supplementary LEO metrics will help provide continuity in light of the discontinuation of the DLHE survey and its gradual replacement with data from HESA's Graduate Outcomes survey. Adoption of the LEO metrics as core metrics is also more feasible now due to the greater availability of data, and development of the LEO dataset to allow more consistent analysis of self-assessed earnings across years.

52. For the TEF Year Four pilot, three core TEF metrics measure the employment circumstances of graduates after they have completed their studies. We look at the proportion of qualifiers in:

- highly skilled employment or higher study
- sustained employment or further study
- sustained employment where they are earning above the median salary for 25-29 year-olds, or that are in higher study.

53. This basket of three employment metrics makes use of the additional LEO-based core metrics, but seeks to avoid overweighting employment outcomes by not including all four possible metrics in this area.

54. The **highly skilled employment or higher study** metric is based on the DLHE survey, which asks leavers to report on their activity six months after gaining their qualification. The survey collected detailed data about a graduate's employment and further study destinations, and the metric shows the proportion of leavers (that responded to the DLHE) who report that they are in highly skilled employment or higher study.

55. Job titles and descriptions of duties are coded into the Standard Occupational Classification (SOC). Highly skilled employment is categorised as those jobs matched to SOC groups 1-3 (managerial and professional). Higher study is categorised as study that is reported by the student²⁸ to be a qualification that is at a level higher than the one that they have recently obtained before completing the DLHE survey. This is a refined version of the metric used in

²⁷ First degrees include undergraduate degrees at Level 6, including honours degrees such as BA and BSc, general and ordinary degrees. 'Other undergraduate' qualifications include (but are not limited to) foundation degrees, higher national diplomas and certificates, and other higher education certificates and diplomas. Students studying modules for institutional credit are not included in the scope of any TEF metrics or contextual data, as they are not in scope for TEF at provider or subject level.

²⁸ The levels of study reported by a student in their DLHE response are described at www.hesa.ac.uk/collection/c16018/a/typequal.

TEF Years Two and Three, which considered outcomes in highly skilled employment or any further study.

56. The other two metrics are based on the Longitudinal Education Outcomes dataset, which links higher education and tax data together to chart the transition of graduates from higher education into the workplace. The LEO dataset links information about students, including their personal characteristics, their education (including schools, colleges and higher education providers attended, as well as courses taken and qualifications achieved), their employment and income, and any benefits claimed.

57. The two LEO-based core metrics consider:

- a. The proportion of qualifiers in sustained employment or further study.
- b. The proportion of qualifiers in sustained employment that are earning above the median salary for 25-29 year-olds, or in higher study.

58. The LEO-based metrics used in this pilot will consider graduates' outcomes three years after graduation. The three graduating cohorts that comprise the metrics definition therefore correspond to the most recent three years of available LEO data, for tax years 2013-14, 2014-15 and 2015-16. The salary outcomes for each cohort are measured against a median salary threshold that is specific to the tax year in which their outcome is being measured, to ensure that the measure tracks changes in labour market conditions appropriately. The median salary for 25-29 year-olds that forms the threshold for the salary-based LEO metric is drawn from the series of Office for National Statistics/HMRC 'Personal Incomes Statistics' publications²⁹ for the appropriate tax year in which the graduates' outcome is being measured, as shown in Table 3.

Table 3: Median earnings thresholds for LEO-based metric cohorts

Higher education qualifiers in	Outcomes in tax year	Median earnings threshold
2009-10	2013-14	£20,000
2010-11	2014-15	£21,000
2011-12	2015-16	£21,500

59. The figures shown in Table 3 are below the starting salary for most modestly paying but socially valuable graduate jobs such as nursing, teaching or midwifery, meaning that the metric records such outcomes as being equally valuable as higher paying professions such as banking or law.

60. The information on self-assessed employment and earnings contained in the LEO dataset is available and consistently defined across all three graduating cohorts that contribute to this year's LEO-based metrics. Graduates in self-assessed employment will contribute to the calculation of both LEO-based metrics in this year's pilot. This was not the case in the Year Three pilot, in which data limitations meant the 'above median earnings' metric definition was limited only to graduates with recorded PAYE earnings. The proportion of graduates in scope

²⁹ Figures taken from table 3.2 of successive publications of Personal Incomes Statistics, available at www.gov.uk/government/collections/personal-incomes-statistics. Rounded to the nearest £500.

for the LEO-based metrics with self-assessment records will be included as contextual information at both provider and subject level.

61. Earnings from PAYE are annualised by calculating the individual's average daily wage for the days recorded in employment. Self-assessed earnings are not annualised as this calculation is not possible.

Presentation of metrics data

62. The presentation of the core metrics, which are included in the TEF metrics workbooks at both provider and subject level, will be illustrated in an exemplar workbook available on the OfS website alongside other technical documentation.
63. The TEF metrics workbooks will present information on each core metric (separately for full-time and part-time students) that will include:
 - a. Indicator (as a percentage).
 - b. Numerator and denominator of the indicator.
 - c. Benchmark (as a percentage).
 - d. Difference between benchmark and indicator.
 - e. Standard deviation, as a measure of the difference between the indicator and benchmark. These are standard deviations of a statistic and so they are more usually called standard errors.
 - f. Z-score (the number of standard deviations that the indicator is from the benchmark).
 - g. Flag (+, ++, -, or -- for reportable metrics).
 - h. Indicator as to whether the metric has a very high or low absolute value (either * or !).
 - i. Statistical significance of differences in absolute performance for attributes of the split metrics.
 - j. Provider contribution to its own benchmark (as a percentage).
64. The '**indicator**' is the outcome achieved by a provider or subject for a metric, for example, the observed proportion of students who continued (or completed) their studies in the year after they entered higher education. The indicator is calculated by dividing the numerator by the denominator. The '**denominator**' is the total number of students who contributed to the calculation of that indicator, for example, the total number of students who entered higher education. The '**numerator**', is the corresponding number of students who are counted positively against the metric, for example, the number of students who continued or completed their studies.

Reportable metrics

65. Reportable core and split metrics must have at least 10 students in the denominator, must have sufficient data to form the benchmarks³⁰, and, in the case of survey data, must have met the response rate threshold³¹. To prevent the disclosure of personal data, where a numerator differs from the denominator by no more than two students, the metric will be partially reportable.
66. Any data point that is not reportable for a core metric, split metric or for the supplementary data will be replaced with a symbol to indicate why, as follows:
- 'N' where there are fewer than 10 students in the population
 - 'N/A' where the provider did not report any students in the population, or did not participate in the survey
 - 'R' where the provider participated in the survey but has not met the response rate threshold required
 - 'SUP' where the provider does not have sufficient data to form the benchmarks.
 - 'DP' where the numerator differs from the denominator by no more than two students, or the metric information has otherwise been suppressed for data protection reasons.
67. In addition, the LEO-based above median earnings threshold or higher study metric must refer to at least 50 per cent of those in employment or higher study having known salary data or being in higher study.

Data protection suppressions

68. The production of metrics at both provider level and subject level means that data protection compliance requires a further assessment of TEF metrics in order to determine whether or not they are reportable. To prevent the disclosure of personal data, it is sometimes necessary to apply secondary suppression to TEF metrics to avoid the scenario in which data suppression implemented at the subject level (because of population sizes, response rates or insufficient benchmarking data) is rendered ineffective by the comparison of that subject's metrics with the provider-level and other subject-level metrics. The OfS has taken a pragmatic approach to the data protection suppressions applied, with the objective of minimising the levels of non-reportable data arising from data protection suppression. However, it should be noted that in

³⁰ Sufficient benchmarking data would be at least 50 per cent coverage for each factor (for example, where entry qualifications are used as a benchmarking factor, at least 50 per cent of the provider's students included in the core or split metric must have appropriately recorded entry qualifications).

³¹ For the NSS, this is 50 per cent. For the DLHE, this is 85 per cent of the target response rate, which is equivalent to 68 per cent for full-time students and 59.5 per cent for part-time students. Response rates are first tested at the core metric level for each mode: those that do not meet the threshold described here result in a global suppression of all of the core and split metrics data (other than the year splits) for the metric in the mode in question. Response rates are then tested for each split of the core metric individually (again, in each mode), with any necessary suppressions applied only to the split (and mode) in question.

designing the data protection suppression approach that has been applied, the requirements of data protection legislation have been paramount.

69. If a core metric or any of the supplementary data has a numerator that differs from the denominator by no more than two students, then it will be deemed **partially reportable**. The metric's denominator, flag, difference from benchmark and associated Z-score, and any very high or very low absolute value marker, will be the only metric information that is shown: to do otherwise risks disclosing information on outcomes for individual students within the cohort. If a provider has only one subject with a core metric or supplementary data deemed partially reportable, and has no subjects with the same metric non-reportable, a secondary suppression is required. In these cases, that metric will be restricted to be partially reportable (meaning that only the limited metric information listed previously will be shown) in another of the provider's smallest subjects: where possible, out-of-scope subjects will be selected for this suppression.
70. If a split metric does not meet the requirement to be reportable because it has a numerator that differs from the denominator by no more than two students, or the split has a denominator of fewer than five students, then that split metric will be partially reportable in its entirety: only limited metric information will be shown for any of the attributes in the same split (specifically, the metric's flag, difference from benchmark and associated Z-score, and any very high or very low absolute value marker). For example, partial suppression of the disability split metric referring to disabled students would also lead to the partial suppression of the corresponding split metric referring to students without a disability. In the subject-level metrics it has usually been necessary to implement a secondary suppression: to partially suppress the affected split in at least one other subject area that the provider delivers. As stated in paragraph 69, in selecting a subject area for secondary suppression, out-of-scope subjects will be used wherever possible.

Benchmarking

71. Benchmarks are used to allow meaningful interpretation of a provider's or subject's actual performance in each of the metrics by taking into account the mix of students and of subjects, and providing information about the 'expected' values based on this. The TEF benchmarks are calculated using a well-established methodology developed in relation to the UK Performance Indicators (UKPIs) for higher education and also used in the publication of NSS outcomes. A full explanation of the benchmarking methodology is provided on the HESA website³². Another worked example is given in the TEF metrics technical document.
72. A unique benchmark is calculated for each core metric, for each provider and subject. The benchmark is a weighted sector average where weightings are based on the characteristics of the students covered by that metric: it gives information about the values that might be expected for the indicator if the characteristics included in the weighting are the only ones that are important. Where differences exist between a metric's indicator and benchmark, these may be due to the provider's or subject's performance, or they may be due to some other characteristic which is not included in the weighting.
73. The benchmarking methodology used in TEF means that a provider is not being compared with a pre-set group of providers, such as a specific subset of other universities or other further

³² See www.hesa.ac.uk/data-and-analysis/performance-indicators/benchmarks.

education colleges. Instead, the outcomes for its students are compared with similar students across the entirety of the higher education sector. The outcomes for students in an individual subject are compared only with similar students across the sector studying the same subject.

74. For the purpose of calculating benchmarks for **provider-level** TEF metrics, ‘the sector’ is made up of all higher education providers delivering provision that is in scope for the TEF, regardless of whether they have met the eligibility criteria or have chosen to enter the TEF, or this subject pilot.
75. When benchmarking the **subject-level** metrics, ‘the sector’ is made up of all providers delivering provision that is in scope for TEF that reported students in the given subject area, regardless of their participation in this year’s pilot or their eligibility for provider-level TEF in Year Four. That is, only chemistry students are included when calculating the benchmarks for the chemistry subject area in subject-level metrics. The only exception to this is benchmarking the continuation metric at subject level. Here, ‘the sector’ is made up of all providers delivering provision that is in scope for the TEF that reported students in a group of subject areas³³.

Benchmarking factors

76. The benchmarking methodology seeks to ensure that student and course characteristics that have the largest effect on what we are measuring, are appropriately taken account of, in order to best focus judgements on the distinct performance of each provider or subject in relation to the experiences and outcomes of its particular student mix. Benchmarking factors are therefore selected and combined in a way that seeks to protect the statistical integrity of the benchmarking approach, while also aiming to ensure applicability to higher education provision delivered across all of the UK by providers of all types. The benchmarking factors selected comprise only those characteristics that are not within the provider’s control (or would be undesirable for a provider to control for), and seeks to limit the extent to which a benchmark value can be determined by a single provider; this is known as self-benchmarking, and can occur when a large proportion of the students in the comparison group are from a single provider.
77. The benchmarking factors used for each metric in TEF are set out in Table 4. The same benchmarking factors are used in the calculation of provider and subject-level metrics.

Provider contribution to its own benchmark

78. The variety of benchmarking factors means that some of the groups of students being compared may be very small, and there may not be many higher education providers that teach students who are similar to the ones in question. In such cases a provider’s benchmark may be heavily influenced by the outcomes of its own students, and the adjusted sector benchmark will be similar to the provider’s own indicator. The proportion that a provider’s or

³³ The continuation metric benchmarks subject of study using nine groupings of the CAH2 subjects, instead of the 34 individual CAH2 subjects which are used in benchmarking all other metrics. Further detail of how subjects are categorised into these nine groups is shown in the TEF metrics technical document. This document will become available at www.officeforstudents.org.uk/advice-and-guidance/teaching/subject-level-pilot-2018-19/further-technical-guidance in early November 2018.

subject's own students contribute to its own benchmark is therefore included in the TEF metric workbooks in order to highlight areas where the benchmark may be of limited use.

Table 4: Benchmarking factors used for each metric in the pilot

Factor	Description (number of categories)	NSS	Continuation	Highly skilled employment or higher study	Sustained employment	Above median earnings threshold
Subject of study	CAH level 2 groupings ³⁴ (variable)	✓ (34 groups)	✓ (9 groups)	✓ (34 groups)	✓ (34 groups)	✓ (34 groups)
Entry qualifications	A variant of those described on the HESA website (variable)	✗	✓ (28 groups, Full-time only)	✓ (4 groups)	✓ (4 groups, Full-time only)	✓ (4 groups)
Age on entry (as at 30 September in the academic year of entry)	Young (including unknown), Mature (2) Mature is defined as 21 and over Young is defined as Students under 21	✓	✓	✓	✓ (Full-time only)	✓ (Part-time only)
Ethnicity	Asian, Black, White (including unknown), Other (4)	✓ (Full-time only)	✓	✓	✓	✓

³⁴ Benchmarking uses the same, amended CAH2 subject areas that form the definition of subjects for the purposes of subject-level TEF in this year's pilot.

Factor	Description (number of categories)	NSS	Continuation	Highly skilled employment or higher study	Sustained employment	Above median earnings threshold
Sex	Male, Female (including Other) (2)	x	x	✓	✓ (Full-time only)	✓
Disability	Disabled, Not disabled (2)	✓	x	✓	x	✓
Educational disadvantage (measured by POLAR4 for all UK domiciled students, regardless of their age)	POLAR4 quintile 1 or 2, POLAR4 quintile 3, 4, 5 or unknown (2)	x	✓	✓	x	✓
Level of study	First degree, Other undergraduate, Programmes at the undergraduate/postgraduate boundary (3)	✓ (Full-time only)	✓	✓	✓	✓
Year	Three academic years relevant to the metric definition (3)	✓	x	x	x	x
Total distinct benchmarking groups		4,896 for full-time, 408 for part-time	12,096 for full-time, 432 for part-time	26,112	6,528 for full-time, 408 for part-time	13,056 for full-time, 26,112 for part-time

Metric flags

79. Once the core metrics are calculated and benchmarked, the difference between the indicator value and the benchmark is derived. Where the indicator is materially different from the benchmark, and that difference is statistically significant, this will be highlighted. This is referred to as **flagging**. Panel members will use metrics flags when forming an initial hypothesis about the rating for the provider, before considering them in light of submissions and contextual information to make judgements on the performance of provide or subject (see 236-278 of the 'TEF subject-level pilot guide'³⁵).

Material differences

80. Where a core or split metric has an indicator that is at least two percentage points above or below its benchmark, this is considered 'materially different'.
81. Exceptionally, where the benchmark is above 97 per cent and the provider's indicator is above the benchmark, the materiality test will not apply, and core and split metrics will only have to meet the significance test in order to be flagged. This is because it would otherwise be impossible for some providers to receive a flag of ++ (see paragraph 85), as it is not possible to achieve a result of over 100 per cent.

Z-scores and statistically significant differences

82. It is not automatically clear whether a material difference from a benchmark is statistically significant. To identify whether it is significant, we need to establish statistical confidence that the difference is greater than variances that would be expected due to chance alone. TEF metrics have adopted a variation on the UKPI method for testing for that difference. The UKPI method is explained in full on the HESA website³⁶. The method calculates the standard deviation of a difference between an indicator and its corresponding benchmark. In TEF metrics the number of standard deviations that the indicator is from the benchmark is given as the Z-score. Differences from a benchmark with a Z-score of +/-1.96 will be considered statistically significant. This is equivalent to a 95 per cent confidence interval (that is, we can have 95 per cent confidence that the difference is not due to chance).
83. The Z-score does not, on its own, provide an indication of performance. It only measures whether the difference between an indicator and the benchmark is statistically significant. As with all methods for establishing statistical confidence, a judgement is required as to the level of risk we are prepared to accept regarding the possibility of a false positive result (or in statistical terms, a Type I error). These would be cases where the Z-score leads us to determine that the difference between an indicator and its benchmark is significant, and therefore indicative of good or poor performance rather than a result of chance alone, when in fact we should not have rejected the possibility that the difference was due to chance. Conversely, as a test of the likelihood that a difference between a provider's benchmark and its indicator is due to chance alone, a Z-score of +/- 3.0 means the likelihood of the difference being due to chance alone is negligible: we have more than 99 per cent confidence that this is not the case. Thus, Z-score values larger than +/- 3.0 provide very little more statistical

³⁵ See www.officeforstudents.org.uk/advice-and-guidance/teaching/subject-level-pilot-year-two-2018-19/.

³⁶ See www.hesa.ac.uk/data-and-analysis/performance-indicators/definitions.

evidence than a Z-score of +/-3.0 and should, for practical purposes, be considered equivalent to +/-3.0.

84. Z-scores and differences from benchmark are provided in the metric workbooks to aid panel members in the assessment process. In particular, at Step 1b of the assessment process, panel members consider a number of additional factors related to the interpretation of the core and split metrics to refine the initial hypothesis, including the Z-scores and size of the difference from benchmark for each metric. In the pilot, we will test the use of metrics with Z-scores of +/-1.65 as potential indicators of performance, when considered alongside evidence in the submission. This equates to a confidence interval of 90 per cent.

Flags

85. Flags will be applied where the indicator is at least +/-2 percentage points from the benchmark **and** the Z-score is at least +/-1.96. Specifically:
- A difference of +2 percentage points and a Z-score of at least +1.96 will receive a positive flag, labelled '+'. If the benchmark is above 97 per cent and the indicator is above benchmark the difference of 2 percentage points is not required.
 - A difference of +3 percentage points and a Z-score of at least +3.00 will receive a double positive flag, labelled '++'. If the benchmark is above 97 per cent and the indicator is above the benchmark, the difference of 3 percentage points is not required.
 - A difference of -2 percentage points and a Z-score below -1.96 will receive a negative flag, labelled '-'.
 - A difference of -3 percentage points and a Z-score below -3.00 will receive a double negative flag, labelled '--'.

Absolute values

86. Panel members will consider a number of factors when forming and refining the initial hypothesis for TEF assessment (see 'Method of assessment' section, paragraphs 235-278 of the 'TEF subject-level pilot guide'³⁷). Their holistic consideration of all of the evidence will include a review of the complete set of metrics information listed in paragraph 63, including the absolute indicator values for the metric.

Very high and low absolute values

87. Where a core TEF metric has an indicator with a very high or low absolute value it will be marked in the metrics workbook. Very high or very low values are defined to be those absolute indicator values that fall within the top or bottom 10 per cent of providers for that metric (in the given mode). Very high values will be marked with a star (*), and very low values will be marked with an exclamation mark (!).
88. The top and bottom 10 per cent of providers will be identified (for the metric and mode in question) on the basis of all providers with a reportable provider-level metric that refers to more than 100 students. The absolute indicator value of the last provider to be counted within the top

³⁷ See www.officeforstudents.org.uk/advice-and-guidance/teaching/subject-level-pilot-year-two-2018-19/.

or bottom 10 per cent will be taken (at two decimal places) to determine the threshold for a value to be denoted very high or very low.

89. A 95 per cent confidence interval will be constructed for the absolute value for each metric (for any population size that the metric refers to).

Very high absolute values

90. The core metric will receive a **green star (*)** if either of the following applies:

- a. For any population size being referred to, the entirety of the 95 per cent confidence interval sits above the identified very high threshold.
- b. The metric has a reportable absolute indicator value of 100 per cent for a population of more than 100 students.

91. The metric will receive a **grey star** in if either of the following applies:

- a. Conditions 90a or 90b are satisfied, but benchmarked flags give a contradictory signal, that is, the core metric has a negative flag or has negative flags for any of its split metrics.
- b. The metric has a reportable absolute indicator value that is at or above the threshold for a value to be denoted very high, but the 95 per cent confidence interval overlaps the very high threshold (or the value is 100 per cent for a population of 100 or fewer students).

92. Values marked with a green star are intended to convey that a provider's performance in that metric is so high that, in absolute terms, the experience or outcome for students regarding that metric is outstanding:

- a. If the core metric is positively flagged, a green star can reinforce an interpretation of positive performance.
- b. If the core metric is unflagged, a green star should be interpreted as similar to a positive flag.

Very low absolute values

93. The core metric will receive a **blue exclamation mark (!)** if either of the following applies:

- a. For any population size being referred to, the entirety of the 95 per cent confidence interval sits below the identified very low threshold.
- b. The provider has achieved a reportable absolute indicator value of 0 per cent for a population of more than 100 students.

94. The metric will receive a **grey exclamation mark** if either of the following applies:

- a. Conditions 93a or 93b are satisfied, but benchmarked flags give a contradictory signal, that is, the core metric has a positive flag or has positive flags for any of its split metrics.
- b. The metric has a reportable absolute indicator value that is at or below the threshold for a value to be denoted very low, but the 95 per cent confidence interval overlaps the very low threshold (or the value is 0 percent for a population of 100 or fewer students).

95. Values marked with a blue exclamation mark are intended to convey that a provider's performance in that metric is so low that, in absolute terms, the experience or outcome for many students regarding that metric is not good:
- If the core metric is negatively flagged, a blue exclamation mark reinforces an interpretation of poor performance.
 - If the core metric is unflagged, a blue exclamation mark should be interpreted as similar to a negative.
96. As set out in the government consultation response, the thresholds above or below which an absolute value is considered as very high or very low have not been recalculated for subject-level metrics. Instead, those thresholds identified in the production of the provider-level metrics have been applied across all of the subject-level metrics to determine whether or not an absolute value receives a star or an exclamation mark.

Split metrics

97. Each core metric will be presented for all of the provider's students (separately for full-time and part-time students) and then for a series of subgroups (called 'splits'), which demonstrate the performance for specific groups of students. These splits primarily reflect student groups who are considered to be underrepresented in higher education.
98. Metric information will also be shown, or 'split', for the individual years that have contributed to the core and supplementary data. The year splits will not be considered as a trajectory, and the presence or absence of a trend will not affect the initial hypothesis (see the 'Step 1b: Metrics-based initial hypothesis' section, paragraphs 262-263 of the 'TEF subject-level pilot guide'³⁸).
99. The TEF metrics workbooks will provide the same information on each split metric as is presented for each core metric, described at paragraph 63 and including the indicator, numerator, denominator, benchmark, Z-score and flag. Very high or very low absolute values will not be identified for the split metrics.
100. Panel members will be particularly interested in where the split metric flags indicate that the student experience or outcomes for a subgroup differ from those which are indicated by the same core metric for the totality of the provider or subject's students. This will include differences in absolute indicator values as well as in flagged metrics. Providers should explicitly address these differences in their submissions.
101. The benchmarks calculated for each split metric are based on only the students within the split. That is, only mature students are included when calculating the benchmark for split metrics in the mature attribute of the age split. Note that this means that the split metrics specific to providers in the devolved administrations will only be benchmarked against students in providers within their administration.
102. Indices of Multiple Deprivation (IMD) measures that are specific to each devolved administration are used in the TEF metric splits. As these measures are country-specific, to

³⁸ See www.officeforstudents.org.uk/advice-and-guidance/teaching/subject-level-pilot-year-two-2018-19/.

ensure consistent data the populations need to be restricted in the same way; to do otherwise would risk performance being skewed by the different measures adopted in each nation. This means, for example, that the IMD splits for Scottish students are only comparing outcomes with other Scottish students. To take account of disadvantage in benchmarking, POLAR is used consistently across all administrations as it is the only available UK-wide measure.

103. The exemplar TEF metrics workbook will illustrate how the split metrics are presented in the TEF metrics workbooks at both provider and subject level.

104. The categories and definitions that will be used for producing the split metrics are shown in Table 5.

Table 5: Categories and their definitions for metric splits

Split	Category definition	Sub-groups
Year	Three individual years that have contributed to the core metrics or supplementary data in question.	Year 1, Year 2, Year 3 ³⁹
Level of study	Level of the programme a student is registered on.	First degree, other undergraduate, programmes at the undergraduate-postgraduate boundary ⁴⁰
Age	Age at start of study.	Young (defined as under 21 for splits of the full-time TEF metrics, and as under 31 for part-time splits) Mature (21 and over for full-time splits, and 31 and over for part-time splits)
Sex	Sex as self-declared on HESA or ILR student records.	Male, Female
Participation groups	Providers in England and Wales only. The POLAR4 classification is applied to UK-domiciled students aged under 21 only.	POLAR4 quintiles 1-2 POLAR4 quintiles 3-5

³⁹ Year 1 refers to the earliest year of data included in the core metric, while Year 3 refers to the most recent year of data included.

⁴⁰ Programmes at the undergraduate-postgraduate boundary are those undergraduate qualifications that include a postgraduate component. Examples include: integrated undergraduate-postgraduate taught masters' degrees on the enhanced or extended pattern; pre-registration medical degrees regulated by the General Medical Council; pre-registration dentistry degrees regulated by the General Dental Council; and other graduate or postgraduate diplomas, certificates or degrees at Levels 5 and 6, where a Level 5 or 6 qualification is a pre-requisite for course entry.

Split	Category definition	Sub-groups
Disadvantage based on national IMD: EIMD	Providers in England only. Applies to students domiciled in England only. EIMD 2015 identifies small area concentrations of multiple deprivation across England.	EIMD quintiles 1-2 ⁴¹ EIMD quintiles 3-5
Disadvantage based on national IMD: NI MDM	Providers in Northern Ireland only. Applies to students domiciled in Northern Ireland only. NIMDM 2017 identifies small area concentrations of multiple deprivation across Northern Ireland.	NI-MDM quintiles 1-2 NI-MDM quintiles 3-5
Disadvantage based on national IMD: SIMD	Providers in Scotland only. Applies to students domiciled in Scotland only. SIMD 2016 identifies small area concentrations of multiple deprivation across Scotland.	SIMD quintiles 1-2 SIMD quintiles 3-5
Disadvantage based on national IMD: WIMD and Communities First	Providers in Wales only. Applies to students domiciled in Wales only. WIMD 2014 identifies small area concentrations of multiple deprivation across Wales. Communities First is the Welsh government's community-focused programme tackling poverty.	WIMD quintile 1 OR Communities First area WIMD quintiles 2 to 5 (excluding Communities First)

⁴¹ Where quintile 1 represents the most deprived areas and quintile 5 represents the least deprived areas.

Split	Category definition	Sub-groups
Welsh medium	Providers in Wales only. This split identifies students who have accessed all or some of their provision delivered through the medium of Welsh.	More than 40 credits through the medium of Welsh for the relevant year Five to 40 credits taught through the medium of Welsh Fewer than five credits through the medium of Welsh
Disability	Disability as self-declared and recorded on HESA or ILR student records.	Disability No disability
Ethnicity	Ethnicity as self-declared on HESA or ILR student records.	White background, Black or minority ethnic background The black and minority ethnic group will also be broken down to report at the level of Black, Asian and Other
Domicile	Domicile as self-declared on HESA or ILR student records. NSS-based metrics only.	UK Other EU Non-EU students
Self-employment (LEO-based metrics only)	Whether graduates have been matched only to a self-assessment tax return within the HMRC tax records.	Graduates who have been matched only to a self-assessment tax return. Graduates not only in self-assessed employment.
Subject splits (Provider level only)	The core metric flags received by each of the providers subjects.	All 34 CAH2 subjects

Differential outcomes

105. The TEF assessment framework includes a specific criterion on the outcomes achieved by students from disadvantaged backgrounds (SO3). The approach to benchmarking split metrics described in paragraph 66 may pose challenges for assessing this criterion in instances where the outcomes for a specific group of students are universally low across the sector.

106. Comparing a provider's performance in relation to such groups with average outcomes across the sector for similar students helps to ensure a fair, equitable assessment process which does not disadvantage a provider for its recruitment profile. However, this approach may fail to identify significant gaps in the outcomes for different groups of students within a provider, or may fail to provide an incentive for the sector to address differential outcomes. The pilot will therefore test new ways of presenting split metric information in order to highlight differential outcomes.
107. In addition to the split metric information set out in paragraph 97-104, TEF pilot metric workbooks at provider-level will present the absolute gaps in the indicators between groups of students identified by the split metrics. While it is already possible to derive this information from the existing TEF metric workbooks, by explicitly presenting these differences we hope to make more visible these differences in performance. Differential outcomes will be explicitly calculated and included only in the provider-level workbooks.
108. In order to aid assessment, absolute differences in indicators will be supplemented by a mechanism to highlight in which cases these differences can be considered statistically significant.

Supplementary degree attainment data (at provider level only)

109. In the pilot we will test an expanded set of supplementary data relating to degree classifications awarded. This will be used at provider level only, and applies only to providers who hold taught degree awarding powers (TDAPs). The data will include Level 6+ undergraduate degree awards made by the provider to the students it has taught. The data will comprise:
- a. **Data on differential degree attainment.** This will show the number and proportion of degrees awarded as firsts and 2:1s to each of the student groups shown in the splits (over time (six, four and two years ago). This data is at an early stage of development, and we expect in future to align it with the OfS's approach to access and participation in higher education. The data will not be benchmarked, but, to aid interpretation, the panel will be provided with sector-wide data about differences in the degree classifications awarded to students from different backgrounds. We will explore how this data can be developed and used alongside the splits and evidence within submissions, in relation to assessing 'Positive outcomes for all'.
 - b. **Data on grade inflation.** This will show the number and proportion of degrees awarded as firsts, 2:1s, other degree classifications and unclassified degree awards ten, six, four and two years ago. As in provider-level TEF, It will be used alongside evidence in the submission as potential evidence in relation to assessing 'Rigour and stretch'. This data will also not be benchmarked, but to help contextualise it, we will include data on students' entry qualifications for the cohorts graduating six, four and two years ago, and we will provide the panel with sector-wide data relating to grade inflation. The differential degree attainment data may also help contextualise changes in a provider's overall grade profile.

Table 6: Supplementary degree attainment data definitions

Criteria	Data	Graduating years	Source
Positive outcomes for all	Degree attainment	2012-13, 2014-15, 2016-17	HESA and ILR data
Rigour and stretch	Grade inflation	2008-09 (or baseline year), 2012-13, 2014-15, 2016-17	
(Contextual)	Entry qualifications	2012-13, 2014-15, 2016-17	

Minimum data requirements

110. This section outlines:

- a. The minimum data requirements which need to be met in order for a provider to be able to participate in the pilot.
- b. The process for determining which of a participating provider's subjects are in scope for assessment at subject level.
- c. The minimum data required by an 'in scope' subject to enable it to be assessed and receive a subject-level rating.

111. The requirements set out in this section reflect feedback from providers and panel members who participated in the first subject-level pilot about the circumstances in which full assessment may not be appropriate, or where there was insufficient evidence to make an assessment.

Suitable provider-level metrics for eligibility

112. Given the key role of metrics in informing TEF assessment, providers must have a minimum set of reportable metrics at the provider level in order to be eligible for TEF assessment. (See paragraphs 65-70 for the definition of 'Reportable metrics'.)

113. In Years Two, Three and Four of provider-level TEF, suitable provider-level metrics have been defined as one year of reportable, benchmarked data for each of the six core metrics, for either full or part-time students, whichever formed the majority taught at the provider. A provider that does not have suitable metrics will not be eligible for assessment in the TEF Year Four provider-level exercise, but may opt in for a provisional rating.

114. The Year Four pilot will test an expanded basket of core metrics, whose inclusion would then impact on the definition of suitable provider-level metrics that would be appropriate for use in the first full subject-level exercise in 2019-21. This definition will need to consider the balance of metrics evidence that would be required to support robust assessment of providers and their subjects, as well as the availability and role of any provisional ratings at both provider and subject level. Consequently, for the purposes of this pilot, a provider's eligibility to participate will be determined by whether it has suitable metrics as defined for the TEF Year Four provider-level exercise.

Out-of-scope subjects

115. In the Year Three pilot a number of providers requested that some of their subjects should not be assessed. These subjects were populated with student data, and generated reportable metrics for some core and split metrics, with the reasons for requesting no assessment including:
- a. The subjects were being 'taught out' and no longer on offer to new students.
 - b. The subjects comprised only intercalated years, generic foundation years or other provision that is available only when integrated in a wider programme of study and not available to new students in its own right.
116. As one of the main purposes of TEF ratings is to provide information to prospective students, it is not appropriate to produce ratings for subjects to which students cannot apply.
117. Subjects will be considered out of scope for subject-level assessment and will not receive a rating if the entirety of provision within that subject area fits the description in paragraph 115a and 115b. Where a subject contains a mixture of in-scope and out-of-scope provision, the subject will receive a subject-level assessment. Furthermore, data for out-of-scope provision will continue to contribute to the provider's provider-level metrics and assessment. While there is no need for a rating to be produced in order to inform prospective student choice, providers should continue to be accountable for the experience of undergraduate students on courses that are out of scope for subject-level TEF assessment.
118. The OfS will seek to identify from available data those subjects that are formed wholly in the manner described within paragraph 115a, and will clearly indicate in the TEF metrics workbooks those subjects that are proposed as in scope and out of scope on this basis. A time series of new entrants to the subject area in each year has been added to the contextual data provided in the TEF metrics workbooks (see paragraphs 26-36), and the OfS will initially classify any subject with no new entrants in the most recent year of contextual data, and no relevant courses listed on the Unistats website, as out of scope.
119. However, it is recognised that the data available to the OfS for this purpose will be neither complete nor sufficiently current to provide a definitive classification of subjects as in scope or out of scope. Any provider that wishes to query the scope classification of any of its subjects will be invited to submit a subject scope declaration form to the OfS, who will then seek to agree any appropriate reclassifications with the provider on a case by case basis.
120. The OfS will test the parameters for identification of out-of-scope subjects through this pilot, in terms both of the data underpinning the proposed scope classification and of the burden of proof that providers must meet to allay any concerns of gaming TEF coverage and participation.

Changes to data or the scope of assessment

121. During the submission window, providers will have the opportunity to request changes to the list of subjects that the OfS has identified as in or out of scope for assessment. Figure 1

sets out the process by providers should review which subjects are in-scope, and request changes if necessary. This may include, for example:

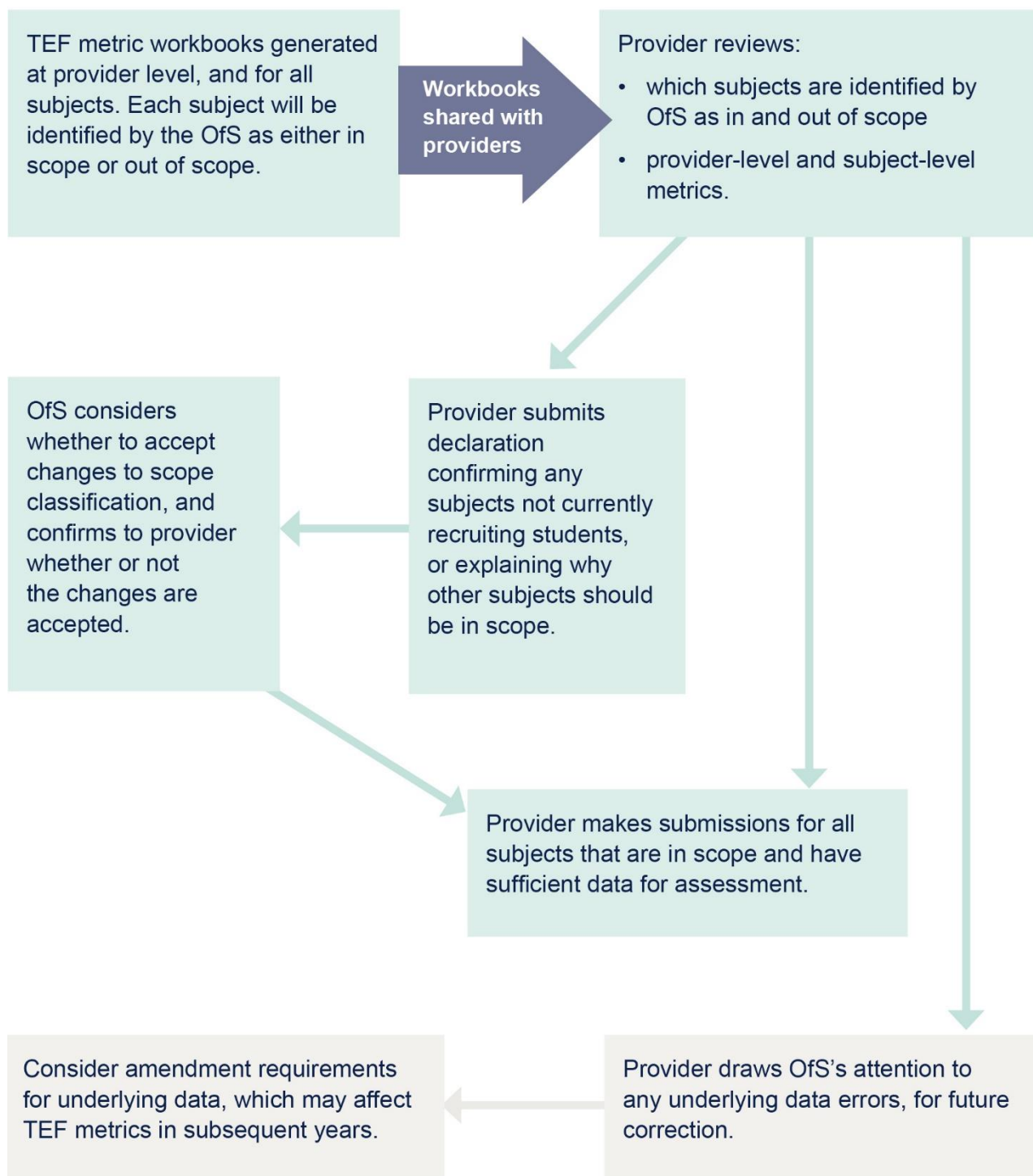
- a. Indicating where subjects the OfS has identified as current and in scope are no longer recruiting new students.
- b. Confirming whether subjects identified by the OfS as discontinued and no longer recruiting new students have been correctly categorised as out of scope.

122. Additionally, during the submission window, providers may wish to draw the OfS's attention to errors in their underlying data and begin the process for requesting amendments to it. However, providers should note that the OfS will not be able to process amended data or reissue subject-level pilot metrics to providers during the pilot submission window.

123. Outside the pilot submission process, a request to amend data for TEF purposes can be made in the usual way⁴².

⁴² Please see www.officeforstudents.org.uk/data-and-analysis/amendments-to-data/.

Figure 1: Process for reviewing which subjects are in scope



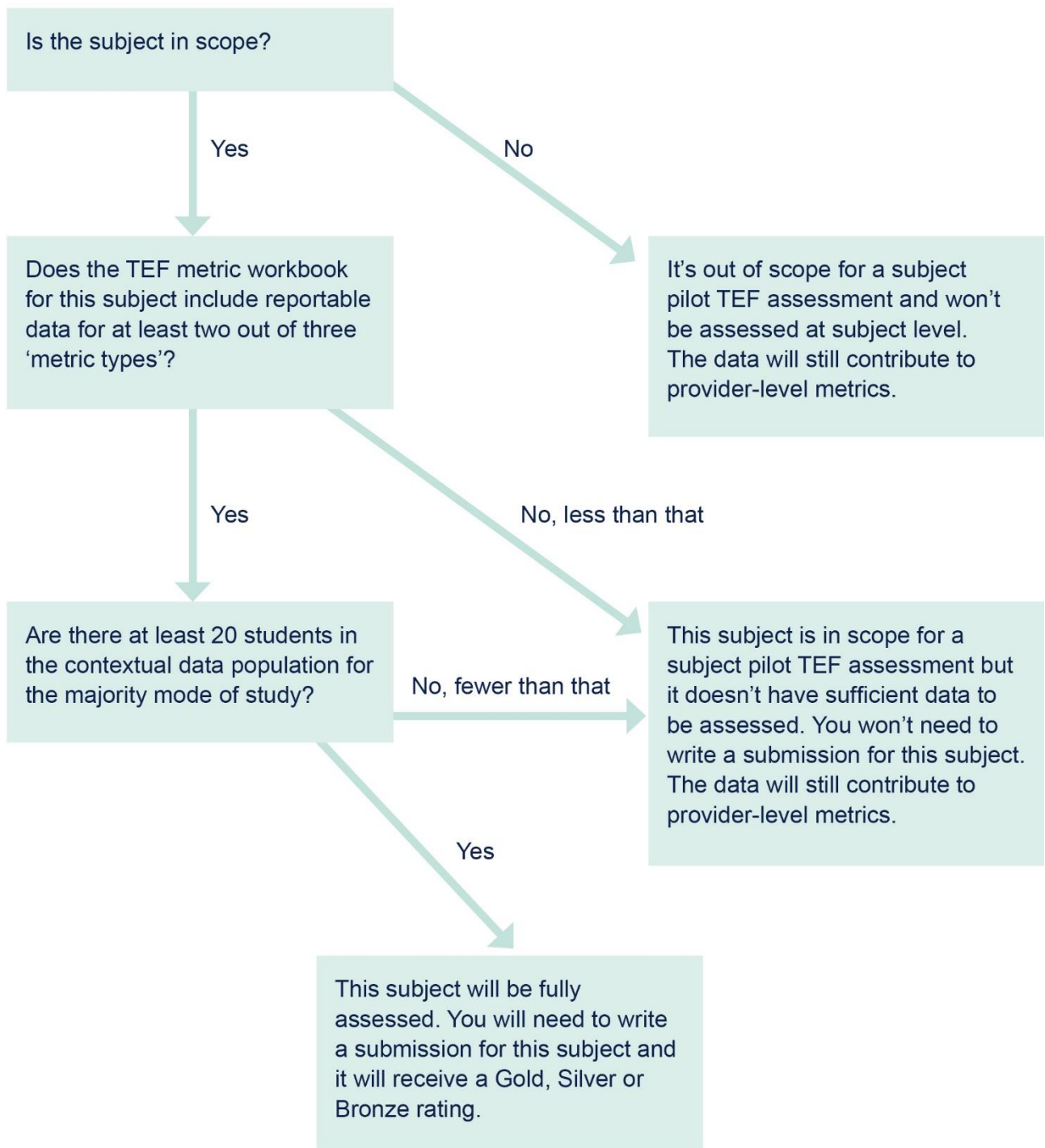
Sufficient metrics for assessment at subject level

124. In the Year Three subject pilot specification it was acknowledged that some providers would find that some of their core metrics at subject level became non-reportable, due to smaller student populations. Most providers would have non-reportable core metrics in at least one of their subject areas (because most providers have at least one small subject).

125. During the Year Three subject pilot, panel members found that if multiple metrics were non-reportable, or cohorts were very small, they typically had insufficient evidence when considering the metrics alongside the submission, to make a best fit judgement about the rating. The Year Four pilot will therefore explore thresholds for the minimum set of data required for a subject to be assessed. The thresholds are deliberately set at a lower level than indicated by evidence from the first pilot, with the aim of including as much provision as possible and exploring whether submissions can more effectively compensate for limitations in the data
126. Once it has been determined that a subject is in scope for assessment (see paragraphs 115-123) the following thresholds for sufficient metrics will be applied in the pilot:
- a. In its majority mode, the subject must have reportable or partially reportable core metrics for two out of the three 'metric types'⁴³ (see paragraph 43).
 - b. The subject must also have a minimum headcount of 20 students in the contextual population for its majority mode of study.
127. Subjects with fewer than two reportable or partially reportable metric types, or with fewer than 20 students, in the majority mode of study will not be assessed at subject level. The data will however be included in the provider's provider-level metrics.
128. A subject will be considered to have reportable student satisfaction metrics as long as one or more of the core metrics derived from the NSS are reportable or partially reportable. A subject will be considered to have reportable employment metrics as long as one or more of the core metrics derived from either DLHE or LEO are reportable or partially reportable. For example, a provider that has reportable DLHE metrics but non-reportable LEO metrics would be considered to have reportable employment metrics.
129. Figure 2 summarises the minimum data requirements for a subject to be assessed

⁴³ For example, a provider that has reportable employment metrics (whether sourced from DLHE or LEO data, or both) but non-reportable NSS-based metrics, would require reportable continuation metrics in order to satisfy this criterion.

Figure 2: Which subjects will be assessed in the Year Four pilot?



Impact of NSS boycott

130. The specification for provider-level TEF in Year Three explained that any provider that does not have reportable metrics for the National Student Survey, for which there is evidence of a boycott of the NSS by students at that provider, should not be disadvantaged by an NSS boycott. In particular, it shall be treated as if it had reportable metrics for the boycotted years, for the purposes of eligibility.
131. This principle of ensuring a provider's ability to participate in TEF is not unduly affected by an NSS boycott, will be extended to the subject pilot. In this pilot, where boycott activity has been evidenced, we will seek to be flexible in the application of the minimum data requirements, and will explore how to ensure robust assessments in circumstances where the NSS data are materially affected by a boycott.
132. For the purposes of the provider and subject-level metrics shown in the TEF metrics workbooks, the response rate threshold for a reportable metric will remain at 50 per cent. Core metrics will be defined consistently for all providers whether or not they experienced boycotts, and will be calculated from the most recent three years of NSS data.
133. Where a provider has experienced an NSS boycott, but this has not caused the core NSS metric, or any single year splits, to be non-reportable based on the response rate falling below 50 per cent, their NSS metrics will remain unchanged.
134. In the case where a provider considers satisfaction levels in its metrics to have been materially affected by an NSS boycott, the onus will be on the provider to demonstrate the existence and impact of the boycott activity in its submission.
135. Where a provider has experienced an NSS boycott and this has caused the NSS metrics to be non-reportable, the onus will be on the provider to provide alternative sources of evidence against the relevant criteria. This may be alternative student survey data, other forms of representative student feedback, or other types of evidence relevant to these criteria. In the absence of NSS data the submission will need to include sufficient alternative evidence to enable the panel to make holistic judgements against the criteria.

Dissemination of data

136. At the start of the submission window, the OfS will make available to each pilot participant its own TEF metrics and contextual data. Pilot participants will be provided with instructions about how to access their data via the TEF extranet. Once the submission window is closed, the TEF metrics workbooks will be issued to panel members for consideration. Providers and panel members must treat the data in strict confidence.
137. We will also release subject-level pilot data to all providers that are eligible for TEF Year Four to support the sector and its students to prepare for subject-level TEF. All providers will be instructed that the information must not be disclosed to any third parties, including staff or students who are not directly involved in the development of subject-level TEF policies and processes (see 'Access to the metrics' section of the 'TEF subject-level pilot guide'⁴⁴).
138. Each provider participating in the Year Four subject-level pilot will receive both provider-level and subject-level metrics workbooks, which will share the same core metrics. At both levels, all core metrics will be reported separately for full-time and part-time students, and will be benchmarked. The provider-level core metrics used in the Year Four subject-level pilot will differ from the metrics produced as part of Year Four provider-level TEF. The treatment of missing and non-reportable data will also be different for the pilot.
139. For the pilot, 34 subjects have been defined by amending the second level of the CAH structure⁴⁵. The OfS will generate, and providers will receive, subject-level metrics for each of the 34 subjects, as well as for the provider as a whole. Providers will not be required to do any coding or mapping of their courses, subjects or data, and the metrics workbooks will clearly indicate which subjects are in scope for assessment in the pilot (see paragraphs 115-123).
140. In addition to the TEF metric workbooks, the OfS will make individualised student-level data available so providers can understand how the indicators have been derived from the underlying data, and which individual students have been mapped to each subject. The OfS has published full descriptions of the subject-level pilot metrics, which are included at Annex B, as well as full algorithms in the TEF metrics technical document⁴⁶. Providers can use these resources to check their underlying data for accuracy.

Data confidentiality and protection

141. The OfS is designated as a producer of official statistics and complies with the UK Statistics Authority's code of practice for statistics⁴⁷. In line with the code, the OfS would normally expect

⁴⁴ See www.officeforstudents.org.uk/advice-and-guidance/teaching/subject-level-pilot-year-two-2018-19/.

⁴⁵ Further information on the development of the new HECoS and the CAH is available at www.hesa.ac.uk/innovation/hecos.

⁴⁶ This document will become available at www.officeforstudents.org.uk/advice-and-guidance/teaching/subject-level-pilot-2018-19/further-technical-guidance in early November 2018.

⁴⁷ Please see www.officeforstudents.org.uk/data-and-analysis/producing-statistics/, and www.statisticsauthority.gov.uk/code-of-practice/.

to provide free and equal access to its statistics through their publication, prior to any release to third parties (such as providers or panel members).

142. In 2019-20 and beyond, it is likely that the TEF metrics and contextual data will be published – for all English providers, whether participating in TEF assessment or not, and for all providers in the devolved administrations who have participated in TEF assessment – and will be released to providers in advance of publication under very strict conditions. The OfS anticipates that the information will be shared with providers that are in scope for TEF, exclusively for quality assurance and the operational purpose of preparing submissions for TEF assessment. All providers throughout the UK will be required to comply with these conditions: failure to do so will cause the OfS to reconsider the availability of TEF metrics and contextual data prior to publication for future iterations of TEF assessment.
143. The 2018-19 pilot remains formative with regard to its role in developing the policy and design for subject-level TEF: as such it will be conducted in confidence, with no individual ratings generated from the pilot being published. The developmental nature of this pilot means that the TEF metrics and contextual data defined for this purpose remain experimental, and are intended as a tool for constructive and collaborative policy development. As described in the main guidance, the metrics and contextual data form only one part of the evidence base considered in TEF assessment: while the metrics inform TEF assessment, they do not determine TEF ratings. While subject-level TEF remains in development, the OfS considers that publication of the TEF metrics being piloted would be prejudicial to the effective development of government policy. Consequently, the OfS does not plan to publish 2018-19 pilot TEF metrics and contextual data. The information will be shared with providers solely for the purposes of participating in the pilot or engaging with the development of subject-level TEF more generally.
144. Upon receipt of the pilot TEF metrics and contextual data, providers will be instructed that the information must not be disclosed to any third parties, including staff or students who are not directly involved in the production of a provider's TEF submissions, or in the development of a provider's subject-level TEF policies and processes. A record of the individuals to whom access has been granted must be made and maintained by the provider, to include the purpose of such access for the individual in question.
145. The OfS has a duty to prevent the disclosure of personal data, and we must remind providers that all uses of the TEF metrics that have been issued to them must comply with data protection legislation⁴⁸. In particular, the individualised student-level data made available through this exercise contains sensitive data items, so access to this data must be restricted to those staff who have a legitimate reason to access and process individual student-level data. To ensure that no provider is able to identify any individual student's contribution (or lack thereof) to the LEO-based metrics, the OfS will be unable to supply student-level data to providers in relation to these metrics. Similarly, NSS data is collected by a third party and any data supplied to providers will be at a sufficiently aggregated level to prevent disclosure and protect the anonymity of responses.

⁴⁸ Including the Data Protection Act (2018) and the General Data Protection Regulation.

Annex A: List of abbreviations

CAH	Common Aggregation Hierarchy
DLHE	Destinations of Leavers from Higher Education
DWP	Department for Work and Pensions
EIMD	English Index of Multiple Deprivation
FPE	Full person equivalence
FTE	Full-time equivalence or full-time equivalent, depending on context
HECoS	Higher Education Classification of Subjects
HESA	Higher Education Statistics Agency
HMRC	Her Majesty's Revenue and Customs
ILR	Individualised Learner Record
IMD	Indices of Multiple Deprivation
JACS	Joint Academic Coding System
LEO	Longitudinal Educational Outcomes
NIMDM	Northern Ireland Multiple Deprivation Measure
NSS	National Student Survey
OfS	Office for Students
PAYE	Pay As You Earn
POLAR	Participation of Local Areas
SIC	Standard industrial classification of economic activity
SIMD	Scottish Index of Multiple Deprivation
SOC	Standard Occupational Classification
TEF	Teaching Excellence and Student Outcomes Framework
UKPI	UK Performance Indicators
WIMD	Welsh Index of Multiple Deprivation

Annex B: TEF subject-level pilot - Full metrics descriptions

Metrics based on the National Student Survey

1. Paragraphs 2 to 24 provide a full description of the metrics to be used in the 2018-19 subject-level TEF pilot which are based on the National Student Survey (NSS). Unless otherwise stated, the details of the metrics' coverage, exclusions and benchmarking factors (described in paragraphs 4 to 10) are applicable to all five of the metrics derived using NSS responses.
2. The NSS asks a range of individual questions which are organised into different sets. These are known as NSS question scales, with each representing a different theme. In responding to an individual NSS question, students indicate their agreement with each statement on a five-point scale. Across the questions that make up a given scale, total agreement by each student is calculated as the percentage of responses that are 'Agree' or 'Strongly agree'. Questions marked with 'N/A' or not answered are ignored. An example, based on the 'Teaching on my course' scale (which comprises Questions 1 to 4), is given in Table B1.

Table B1: Example data

Student	Q1	Q2	Q3	Q4	Percentage agree
A	Strongly agree	Strongly agree	Agree	Neither	75
B	Strongly agree	Strongly agree	Agree	N/A	100
C	Strongly agree	Agree	Agree	Disagree	75
D	Strongly agree	Agree	Disagree	Disagree	50
E	Agree	Disagree	N/A	N/A	50

3. In this example, the total percentage agreement for the provider would be 70 per cent (the sum of percentages divided by the number of students: $(75+100+75+50+50) \div 5 = 70$).

Coverage (applicable to all NSS-based metrics)

4. The NSS is targeted at all final year undergraduates. Non-final year students on flexible provision or who change their study plans may also be included by participating providers.
5. The NSS covers UK, other EU and non-EU students.
6. The NSS-based metrics cover students surveyed during the spring of:
 - 2016 (defines the Year 1 year-split metric)
 - 2017 (defines the Year 2 year-split metric)
 - 2018 (defines the Year 3 year-split metric).
7. The NSS response rate in 2018 was 70 per cent.

Exclusions (applicable to all NSS-based metrics)

8. The following exclusions apply:
- a. Students who did not reach the final year of their course in any of the three most recent years.
 - b. Students not aiming for an undergraduate level qualification, or aiming for a qualification of 1 FTE or lower.
 - c. Students who were not on a full-time or part-time mode of study.

Benchmarking factors (applicable to all NSS-based metrics)

9. The factors used to benchmark the NSS-based metrics for full-time students are:

- subject of study
- age of entry
- ethnicity
- disability
- level of study
- year of cohort.

10. The factors used to benchmark the NSS-based metrics for part-time students are:

- subject of study
- age of entry
- disability
- year of cohort.

'Teaching on my course' metric

11. This metric is based on student's responses to NSS questions 1 to 4 which cover the NSS scale 'Teaching on my course'.

12. In 2016 these questions were as follows:

- Q1** – Staff are good at explaining things.
- Q2** – Staff have made the subject interesting.
- Q3** – Staff are enthusiastic about what they are teaching.
- Q4** – The course is intellectually stimulating.

13. In 2017 and 2018 these questions were as follows:

- Q1** – Staff are good at explaining things.

- Q2** – Staff have made the subject interesting.
- Q3** – The course is intellectually stimulating.
- Q4** – My course has challenged me to achieve my best work.

‘Assessment and feedback’ metric

14. This metric is based on student’s responses to NSS questions which cover the NSS scale ‘Assessment and feedback’.

15. In 2016 these were Questions 5 to 9, as follows:

- Q5** – The criteria used in marking have been clear in advance.
- Q6** – Assessment arrangements and marking have been fair.
- Q7** – Feedback on my work has been prompt.
- Q8** – I have received detailed comments on my work.
- Q9** – Feedback on my work has helped me clarify things I did not understand.

16. In 2017 and 2018 these were Questions 8 to 11, as follows:

- Q8** – The criteria used in marking have been clear in advance.
- Q9** – Marking and assessment has been fair.
- Q10** – Feedback on my work has been timely.
- Q11** – I have received helpful comments on my work.

‘Student voice’ metric

17. This metric is based on student’s responses to NSS questions 23 to 25, which cover the NSS scale ‘Student voice’. As these questions were only present in the 2017 and 2018 NSS, there will be no ‘Student voice’ metric for ‘Year 1’, which corresponds to the 2016 NSS.

18. In 2017 and 2018 the ‘Student voice’ questions were as follows:

- Q23** – I have had the right opportunities to provide feedback on my course.
- Q24** – Staff value students’ views and opinions about the course.
- Q25** – It is clear how students’ feedback on the course has been acted on.

19. Question 26 from this scale is not included in the calculation of the ‘Student voice’ metric.

‘Academic support’ metric

20. This metric is based on student’s responses to NSS questions which cover the NSS scale ‘Academic support’.

21. In 2016 these were Questions 10 to 12, as follows:

- Q10** – I have received sufficient advice and support with my studies.
- Q11** – I have been able to contact staff when I needed to.
- Q12** – Good advice was available when I needed to make study choices.

22. In 2017 and 2018 these were Questions 12 to 14, as follows:

Q12 – I have been able to contact staff when I needed to.

Q13 – I have received sufficient advice and guidance in relation to my course.

Q14 – Good advice was available when I needed to make study choices

‘Learning resources’ metric

23. This metric is based on student’s responses to NSS questions which cover the NSS scale ‘Learning resources’.

24. In 2017 and 2018 the ‘Learning resources’ questions were as follows.

Q18 – The IT resources and facilities provided have supported my learning well.

Q19 – The library resources (e.g. books, online services and learning spaces) have supported my learning well.

Q20 – I have been able to access course-specific resources (e.g. equipment, facilities, software, collections) when I needed to.

Continuation metrics

25. The continuation metrics described at paragraphs 26 to 39 are based on the individualised student data captured in the Higher Education Statistics Agency (HESA) and Individualised Learner Record (ILR) student records.

Full-time continuation metric

26. This metric tracks students from the date they enter a higher education provider to their activity a year later. The continuation metric is based on student activity on a census date one year and 14 days after their commencement date. Students who qualify at undergraduate or postgraduate level on or before the census date, continue at the same provider on the census date, or are studying at higher education level at another provider on the census date are deemed to have continued. All other students are deemed non-continuers.

27. To align with the census date period of one year and 14 days, an entrant year cohort is defined based on those students starting courses between the dates of 18 July and the following 17 July. This allows the activity of all students in this cohort on their census date to be determined in the following data reporting period.

28. To be counted as continuing, the student must either have qualified or be recorded as actively studying on a higher education course in the relevant HESA or ILR dataset. Students who transfer to a provider that does not submit data to HESA or ILR will be counted as non-continuers.

Coverage of the full-time continuation metric

29. This metric includes all UK-domiciled students who are included in one of the relevant HESA or ILR datasets and registered as entrants on higher education Level 4, 5 and 6 programmes⁴⁹.

30. The full-time continuation metric covers students entering higher education:

- between 18 July 2013 and 17 July 2014 (defines the Year 1 year-split metric)
- between 18 July 2014 and 17 July 2015 (defines the Year 2 year-split metric)
- between 18 July 2015 and 17 July 2016 (defines the Year 3 year-split metric).

Exclusions of the full-time continuation metric

31. The following exclusions apply:

- a. EU and non-EU international students.
- b. Students not registered on a first degree or other undergraduate course.
- c. Students registered at the same provider studying at the same level in the year prior to entry.
- d. Students recorded in another provider's HESA or ILR data for the same activity.
- e. Students with more than one record at a provider with the same mode and level of study.

Benchmarking factors for the full-time continuation metric

32. The factors used to benchmark the full-time continuation metric are:

- subject of study
- entry qualifications
- age on entry
- ethnicity
- Participation of Local Areas (POLAR4) quintile
- level of study.

Part-time continuation metric

33. This metric tracks students from the date they enter a higher education provider to their activity two years later. The continuation metric is based on student activity on a census date two years and 14 days after their commencement date. Students who qualify at undergraduate or postgraduate level on or before the census date, continue at the same provider on the census date, or are studying at higher education level at another provider on the census date are deemed to have continued. All other students are deemed non-continuers.

⁴⁹ Throughout this annex references to Level 6 qualifications should be taken to include integrated masters' qualifications.

34. To align with the census date period of two years and 14 days, an entrant year cohort is defined based on those students starting courses between the dates of 18 July and the following 17 July. This allows the activity of all students in this cohort on their census date to be determined in the data reporting period two years afterwards.
35. To be counted as continuing, the student must either have qualified or be recorded as actively studying on a higher education course in the relevant HESA or ILR dataset. Students who transfer to a provider that does not submit data to HESA or ILR will be counted as non-continuers.

Coverage of the part-time continuation metric

36. This metric includes all UK-domiciled students who are included in one of the relevant HESA or ILR datasets and registered as entrants on higher education Level 4, 5 and 6 programmes.
37. The part-time continuation metric covers students entering higher education:
- between 18 July 2012 and 17 July 2013 (defines the Year 1 year-split metric)
 - between 18 July 2013 and 17 July 2014 (defines the Year 2 year-split metric)
 - between 18 July 2014 and 17 July 2015 (defines the Year 3 year-split metric).

Exclusions of the part-time continuation metric

38. The following exclusions apply:
- a. EU and non-EU international students.
 - b. Students not registered on a first degree or other undergraduate course.
 - c. Students registered at the same provider studying at the same level in the year prior to entry.
 - d. Students recorded in another provider's HESA or ILR data for the same activity.
 - e. Students with more than one record at a provider with the same mode and level of study.

Benchmarking factors for the part-time continuation metric

39. The factors used to benchmark the part-time continuation metric are:
- subject of study
 - age on entry
 - ethnicity
 - POLAR4 quintile
 - level of study.

Employment metrics

'Highly skilled employment or higher study' metric

40. Paragraphs 41 to 50 provide a full description of this metric, which is based on the Destinations of Leavers in Higher Education (DLHE) survey.
41. This metric expresses the number of UK-domiciled leavers who say they are in highly skilled employment or studying at a higher level (or both), as a percentage of all those who are working or studying or seeking work at approximately six months after leaving. All other categories are excluded from the denominator for this indicator.
42. Leavers are asked to indicate their current activity, selecting from eight categories. They are then asked to indicate the most important activity. In table B2 (adapted from HESA⁵⁰) the responses that are included in the 'Highly-skilled employment or higher study' metric are highlighted (those in white or yellow are included in the denominator; those in yellow are included in the numerator). The responses that are excluded from the indicator are shaded in grey.
43. Those who indicate they are in employment are asked to provide further detail about that employment including a job title. That job title is mapped to the Standard Occupational Classification (SOC)⁵¹. For this metric, jobs that are coded in SOC major groups 1 to 3 are counted as highly skilled.
44. Those who indicate they are in further study are asked to provide further detail about the type of qualification they are aiming for. This is used to determine whether this further study was at a higher level than their original study. For students who qualified at 'Other UG' level, the responses that are classified at a higher level are 'higher degree, mainly by research', 'higher degree, mainly by taught course', 'postgraduate diploma or certificate' and 'first degree'. For all other students, the responses that are classified at a higher level are 'higher degree, mainly by research', 'higher degree, mainly by taught course' and 'postgraduate diploma or certificate'.
45. The indicator is therefore those leavers in categories 01 to 06 (where employment is in SOC 1-3, and further study is at a higher level) divided by those leavers in categories 01 to 08.
46. Further detail can be found on the HESA website⁵².

⁵⁰ See www.hesa.ac.uk/pis/defs#DLHE.

⁵¹ See www.hesa.ac.uk/support/documentation/industrial-occupational.

⁵² See www.hesa.ac.uk/pis/emp.

Table B2: DLHE responses that are included in the 'highly-skilled employment or higher study' metric

(Those responses shown in white and yellow are included in the denominator; those highlighted in yellow are included in the numerator). The responses that are excluded from the indicator are shaded in grey.)

Most important activity (MIMPACT)	If any other activity includes (ALLACT)	Derived activity category	SOC group	Level of qualification recently obtained	Type of qualification (TYPEQUAL)
		XX Ineligibility or explicit refusal			
Working full-time	Engaged in full-time study, training or research or Engaged in part-time further study, training or research	03 Primarily in work and also studying	SOC 1-3	All	All
			Other	All	All
	Otherwise	01 Full-time work	SOC 1-3	All	All
			Other	All	All
Working part-time	Engaged in full-time study, training or research or Engaged in part-time further study, training or research	03 Primarily in work and also studying	SOC 1-3	All	All
			Other	All	All
	Otherwise	02 Part-time work	SOC 1-3	All	All
			Other	All	All
Unemployed and looking for work		08 Unemployed		All	All

Most important activity (MIMPACT)	If any other activity includes (ALLACT)	Derived activity category	SOC group	Level of qualification recently obtained	Type of qualification (TYPEQUAL)	
Due to start a job in the next month	Working full-time	01 Full-time work	SOC 1-3	All	All	
			Other	All	All	
	Engaged in full-time further study, training or research, provided that 'Working full-time' has not been selected.	05 Full-time study		All	All	01 – Higher degree, mainly by research
				All	All	02 – Higher degree, mainly by taught course
				All	All	03 – Postgraduate diploma or certificate
				Other undergraduate	All	04 – First degree
				First degree, or undergraduate qualifications containing postgraduate components	All	04 – First degree
				All	All	Other
	Working part-time, provided that Working full-time and 'Engaged in full-time further study, training or research' has not been selected.	02 Part-time work		SOC 1-3	All	N/A
				Other	All	N/A
Otherwise	07 Due to start work			All	N/A	

Most important activity (MIMPACT)	If any other activity includes (ALLACT)	Derived activity category	SOC group	Level of qualification recently obtained	Type of qualification (TYPEQUAL)
Engaged in full-time further study, training or research	Working full-time or Working part-time	04 Primarily studying and also in work		All	01 – Higher degree, mainly by research
				All	02 – Higher degree, mainly by taught course
				All	03 – Postgraduate diploma or certificate
				Other undergraduate	04 – First degree
				First degree, or undergraduate qualifications containing postgraduate components	04 – First degree
				All	Other
	Otherwise	05 Full-time study		All	01 – Higher degree, mainly by research
				All	02 – Higher degree, mainly by taught course
				All	03 – Postgraduate diploma or certificate
				Other undergraduate	04 – First degree

Most important activity (MIMPACT)	If any other activity includes (ALLACT)	Derived activity category	SOC group	Level of qualification recently obtained	Type of qualification (TYPEQUAL)
				First degree, or undergraduate qualifications containing postgraduate components	04 – First degree
				All	Other
Engaged in part-time further study, training or research	Working full-time or Working part-time	04 Primarily studying and also in work		All	01 – Higher degree, mainly by research
				All	02 – Higher degree, mainly by taught course
				All	03 – Postgraduate diploma or certificate
				Other undergraduate	04 – First degree
				First degree, or undergraduate qualifications containing postgraduate components	04 – First degree
	All	Other			
	Otherwise	06 Part-time study		All	01 – Higher degree, mainly by research

Most important activity (MIMPACT)	If any other activity includes (ALLACT)	Derived activity category	SOC group	Level of qualification recently obtained	Type of qualification (TYPEQUAL)
				All	02 – Higher degree, mainly by taught course
				All	03 – Postgraduate diploma or certificate
				Other undergraduate	04 – First degree
				First degree, or undergraduate qualifications containing postgraduate components	04 – First degree
				All	Other
Taking time out in order to travel		09 Other			
Something else		09 Other			

Coverage of the highly-skilled employment or higher study metric

47. This metric includes all UK-domiciled leavers who are included in the relevant HESA and ILR datasets and have been awarded full Level 4, 5 or 6 qualifications.

48. The metric covers students leaving higher education in academic years:

- 2014-15 (defines the Year 1 year-split metric)
- 2015-16 (defines the Year 2 year-split metric)
- 2016-17 (defines the Year 3 year-split metric).

Exclusions of the highly-skilled employment or higher study metric

49. The following exclusions apply:

- a. EU and non-EU international students.
- b. Students who are not counted in the DLHE target population.
- c. Students who were not awarded an undergraduate Level 4, 5 or 6 qualification.
- d. Students who are recorded in another provider's ILR data for the same activity.

Benchmarking factors for the highly-skilled employment or higher study metric

50. The factors used to benchmark the highly-skilled employment or higher study metric are:

- subject of study
- entry qualifications
- age on entry
- ethnicity
- sex
- disability
- POLAR4 quintile
- level of study.

‘Sustained employment or further study’ metric

51. Paragraphs 52 to 69 provide a full description of the metrics to be used within the 2018-19 subject-level TEF pilot which are based on the Longitudinal Employment Outcomes (LEO) dataset, which links higher education and tax data together to chart the transition of graduates from higher education to the workplace. The LEO dataset links information about students, including their personal characteristics, their education (including schools, colleges and higher education providers attended as well as courses taken and qualifications achieved), their employment and income, and any benefits claimed.

52. This employment metric considers the proportion of qualifiers in sustained employment or further study three years after graduation, based on the LEO dataset.
53. The Department for Education's definition of sustained employment is consistent with definitions used for 16-19 accountability, and the outcome-based success measures published for adult further education. The definition of sustained employment three years after graduation looks at employment activity captured by Pay As You Earn (PAYE) employment records for at least one day a month in five out of six months in the October to March periods in 2013-14, 2014-15 and 2015-16, for graduates in 2009-10, 2010-11 and 2011-12 respectively. If they are employed in all five months from October to February, but do not have a PAYE employment record for March, then graduates must have an additional employment record in April to be considered as being in sustained employment. The definition also includes any graduates returning a self-assessment tax form in 2013-14, 2014-15 or 2015-16 stating that they have received income from self-employment during that tax year.
54. 'Sustained employment' is taken together with further study in the definition of TEF metrics: the numerator counts all graduates identified as being in sustained employment or further study. A graduate is defined as being in further study if they have a valid higher education study record at any UK publicly funded higher education institution or any English alternative provider or further education college in the HESA and ILR student records in the 2013-14, 2014-15 or 2015-16 tax year. The further study does can be a higher education qualification at any level (undergraduate or postgraduate).
55. Further detail can be found on the Gov.uk website⁵³.

Coverage of the sustained employment or further study metric

56. This metric includes all UK-domiciled leavers who are included in the relevant HESA and ILR datasets and have been awarded full Level 4, 5 or 6 qualifications.
57. The metric covers students leaving higher education in academic years:
- 2009-10 (defines the Year 1 year-split metric)
 - 2010-11 (defines the Year 2 year-split metric)
 - 2011-12 (defines the Year 3 year-split metric).

Exclusions of the sustained employment or further study metric

58. The following exclusions apply:
- a. EU and non-EU international students.
 - b. Students who were not awarded an undergraduate Level 4, 5 or 6 qualification.
 - c. Students who are recorded in another provider's ILR data for the same activity.
 - d. Students at providers in Northern Ireland, or at providers that were not required to return HESA or ILR data in 2009-10, 2010-11 or 2011-12.

⁵³ See www.gov.uk/government/statistics/graduate-outcomes-by-degree-subject-and-university.

- e. Students without an HM Revenues and Customs (HMRC) or Department for Work and Pensions (DWP) tax or benefits record in any year, and the small minority of students whose personal characteristics data was not sufficiently complete to enable linking to HMRC or DWP records.

Benchmarking factors for the sustained employment or further study metric

59. The factors used to benchmark the full-time sustained employment or further study metric are:

- subject of study
- entry qualifications
- age on entry
- ethnicity
- sex
- level of study.

60. The factors used to benchmark the part-time sustained employment or further study metric are:

- subject of study
- ethnicity
- level of study.

‘Above median earnings or in higher study’ metric

61. This employment metric is based on the LEO dataset, and considers the proportion of qualifiers in sustained employment who are earning over the median salary for 25- to 29-year-olds, or are in further study at a higher level than their original qualification.

62. Qualifiers in sustained employment or further study are defined as in the description of the ‘Sustained employment or further study’ metric. It is the population of graduates who were in sustained employment (with known salary information) or in further study who form the denominator of this metric. The numerator includes graduates within this denominator population whose PAYE or self-assessment earnings exceed the median salary for 25- to 29-year-olds in the relevant tax year three years after graduation. This is defined according to the statistics published in the annual HMRC publication series ‘Personal income statistics’⁵⁴. The median salaries for 25- to 29-year-olds, as published, were £20,000 in 2013-14, £21,000 in 2014-15 and £21,500 in 2015-16.

63. Earnings from PAYE are annualised by calculating the individual’s average daily wage for the days recorded in employment and multiplying this by the number of days in the tax year. Self-assessed earnings are not annualised as this calculation is not possible. This means that the metric considers raw earnings data for graduates who have only been matched to a self-assessment tax return. For a graduate with a combination of earnings from PAYE and self-

⁵⁴ See www.gov.uk/government/collections/personal-incomes-statistics.

assessment, the metric considers the combination of annualised PAYE earnings and raw self-assessed earnings.

64. Further detail can be found on the Gov.uk website⁵⁵.

Coverage of the above median earnings or in higher study metric

65. This metric includes all UK-domiciled leavers who are included in the relevant HESA and ILR datasets and have been awarded full Level 4, 5 or 6 qualifications.

66. The metric covers students leaving higher education in academic years:

- 2009-10 (defines the Year 1 year-split metric)
- 2010-11 (defines the Year 2 year-split metric)
- 2011-12 (defines the Year 3 year-split metric).

Exclusions of the above median earnings or in higher study metric

67. The following exclusions apply:

- a. EU and non-EU international students.
- b. Students who were not awarded an undergraduate Level 4, 5 or 6 qualification.
- c. Students who are recorded in another provider's ILR data for the same activity.
- d. Students at providers in Northern Ireland, or at providers that were not required to return HESA or ILR data in 2009-10, 2010-11 or 2011-12.
- e. Students without an HMRC or DWP tax or benefits record in any year, and the small minority of students whose personal characteristics data was not sufficiently complete to enable linking to HMRC or DWP records.
- f. Students who were not in sustained employment or further study three years after graduation.
- g. Students who were in sustained employment three years after graduation but whose salary information was not known.

Benchmarking factors for the above median earnings or in higher study metric

68. The factors used to benchmark the full-time above median earnings or in higher study metric are:

- subject of study
- entry qualifications
- ethnicity

⁵⁵ See www.gov.uk/government/statistics/graduate-outcomes-by-degree-subject-and-university.

- sex
- disability
- POLAR4 quintile
- level of study.

69. The factors used to benchmark the part-time above median earnings or in higher study metric are:

- subject of study
- age on entry
- entry qualifications
- ethnicity
- sex
- disability
- POLAR4 quintile
- level of study.

Supplementary degree attainment data (at provider level only)

70. Paragraphs 71 to 86 provide a description of the set of supplementary data relating to degree classifications awarded that will be used within the pilot. This data will only be generated at provider level, for providers that hold taught degree awarding powers (TDAPs).

Coverage

71. The supplementary data relating to degree attainment will only be produced for providers that currently hold TDAPs. It covers all awards made by a provider to the students it has taught.

72. The data will include all students who are included in one of the relevant HESA or ILR datasets and recorded as qualifying from a Level 6 (or higher) undergraduate degree award.

73. The data covers UK, other EU and non-EU students.

Exclusions

74. The following exclusions apply:

- a. Students who were not awarded an undergraduate Level 6+ qualification.
- b. Awards made by a provider to students who are registered or taught elsewhere, under franchising or validation arrangements.
- c. Students who are recorded in another provider's ILR data for the same activity.

Benchmarking factors

75. The supplementary data relating to degree attainment is not benchmarked.

Composition of the supplementary data

76. The supplementary data relating to degree attainment will comprise:

- a. Data on differential degree attainment (described further in paragraphs 77 to 80).
- b. Data on grade inflation (described further in paragraphs 81 to 83).
- c. Contextual data on the prior attainment of the graduating cohorts considered by the data on differential degree attainment and grade inflation (described in paragraphs 84 to 86).

Data on differential degree attainment

77. This data will show the proportion of Level 6+ undergraduate degrees awarded as firsts and upper seconds (1sts and 2:1s). The number of students awarded a 1st or 2:1 are counted as the numerator. The denominator counts all Level 6+ undergraduate degree qualifiers awarded a 1st, 2:1, any other degree classification or unclassified degree award.

78. The data will be shown for each of the student groups shown in the standard TEF metric splits (described in Table 5 of the main body of this document). For each split, the data will be shown for three cohorts individually: for the cohorts graduating six, four and two years ago. The data covers students awarded qualifications in academic years:

- 2012-13 (defines the 'six years ago' position)
- 2014-15 (defines the 'four years ago' position)
- 2016-17 (defines the 'two years ago' position⁵⁶).

79. The TEF metric workbooks for the pilot will also present the absolute gaps in the proportions between the groups of students in each of these years. Where the differences between the proportions is statistically significant (based on an exact binomial test), these cases will be highlighted within the workbook.

80. This data is at an early stage of development and we expect in future to align it with the Office for Students' wider approach to data on degree attainment, including for the purposes of understanding access and participation in higher education.

Data on grade inflation

81. This data will show the number and proportion of degrees awarded as each of 1sts, 2:1s, other degree classifications and unclassified degree awards 10, six, four and two years ago. The data covers students awarded qualifications in academic years:

- 2008-09 (defines the baseline year, as the '10 years ago' position)

⁵⁶ The 'two years ago' position reflects the most recent academic year of HESA and ILR data currently available.

- 2012-13 (defines the 'six years ago' position)
- 2014-15 (defines the 'four years ago' position)
- 2016-17 (defines the 'two years ago' position).

82. Data will be provided for these years, where it is available within providers' HESA and ILR student-level data returns. The Office for Students considers information 'available' for any year in which the provider held and used its own TDAPs: information will only be considered unavailable if the provider did not award any Level 6+ undergraduate degrees to students it taught and registered in a given year. If data is unavailable for the baseline year of 2008-09 but is available for a year between 2008-09 and 2012-13, data will instead be provided for the year that is nearest to 2008-09 as the baseline.

83. The data will also report the percentage changes in the number of graduates awarded each category of degree classification, between 2008-09 (or the baseline year identified) and 2016-17.

Contextual data on the entry qualifications of graduating cohorts

84. The data on differential degree attainment and grade inflation will be accompanied by contextual data on the entry qualifications of students within those graduating cohorts, based on the qualifications those students held at their point of entry to higher education.

85. The data covers students awarded qualifications in academic years:

- 2012-13 (equating to the 'six years ago' position described for the data on differential degree attainment and grade inflation)
- 2014-15 (equating to the 'four years ago' position)
- 2016-17 (equating to the 'two years ago' position).

86. The entry qualification information will present data using the same categories as the TEF contextual data (described in Table 1 of the main body of this document). Students are assigned to one of the following categories:

- a. UK-domiciled student holding any higher-education level qualification.
- b. UK-domiciled student with high tariff points (over 390).
- c. UK-domiciled student with medium tariff points (280 to 390).
- d. UK-domiciled student with low tariff points (1 to 280).
- e. UK-domiciled student with non-tariff bearing qualifications.
- f. Non-UK domiciled student. Very few international qualifications are included in the UCAS tariff, so no attempt has been made to sub-categorise the qualifications held by students domiciled outside of the UK.



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