

HEFCE 02/24

Respond by Friday 26 July 2002

April

Request

# Teaching Quality Enhancement Fund

**Funding arrangements 2002-03 to 2004-05**

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## Teaching Quality Enhancement Fund

### Funding arrangements 2002-03 to 2004-05

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To	Heads of HEFCE-funded higher education institutions Heads of HEFCE-funded further education colleges Heads of universities in Northern Ireland
Of interest to those responsible for	Learning and teaching, Widening participation, Academic and strategic planning
Reference	02/24
Publication date	April 2002
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### Executive summary

#### Purpose

1. This document describes the funding arrangements for each strand of the Teaching Quality Enhancement Fund (TQEF) for the period 2002-03 to 2004-05. It provides information about the funding arrangements and timetable for:
  - sending to us revised institutional learning and teaching strategies and action plans

- the Fund for the Development of Learning and Teaching (FDTL) phases four and five
- the Learning and Teaching Support Network (LTSN)
- the National Teaching Fellowship Scheme.

#### Key points

2. We intend to build on the initial success of the TQEF by continuing funding over the three-year period 2002-03 to 2004-05 for the three strands of the TQEF: the institution, the subject and the individual.
3. We expect to allocate £31 million to the TQEF in 2002-03, £30 million in 2003-04 and £31 million in 2004-05.
4. Funding within the institutional strand of the TQEF will be allocated to all higher education institutions. Institutions are requested to submit a revised learning and teaching strategy and action plan to us by 26 July 2002 in order to have their institutional allocation confirmed for the three-year period 2002-03 to 2004-05.
5. Institutions are encouraged to use the funds provided within the institutional strand to support the implementation of learning and teaching strategies which underpin activities relating to one or more national areas of priority, as set out in paragraph 15.
6. We will continue to support the subject strand of the TQEF through our funding for the LTSN and phases four and five of the FDTL.
7. We will continue to recognise and reward individual academics who demonstrate excellence in learning and teaching through the National Teaching Fellowship Scheme, and through our support for implementation of recognition and reward schemes within the revised institutional learning and teaching strategies.

#### Action required

8. Revised institutional learning and teaching strategies and action plans must be submitted to Victoria Martin at the HEFCE by **Friday 26 July 2002**.

## Development of the TQEF initiative

### Background

9. We established in 1999 an integrated fund – the Teaching Quality Enhancement Fund – to contribute to the delivery of our learning and teaching strategy. HEFCE 99/48 described the funding arrangements and timetable for each strand of the TQEF until July 2002. This document describes the funding arrangements and timetable of the TQEF for the period 2002-03 to 2004-05. The TQEF will therefore continue for a further three-year period from August 2002 to July 2005.

### Strategic purposes and priorities

10. The main aim of our learning and teaching strategy remains to contribute to the improvement of the quality of learning and teaching in higher education. The strategy has five main purposes:
  - a. Encouragement and reward. We wish to increase the status of learning and teaching, reward high quality, and help those with the potential to achieve high quality to do so.
  - b. Disseminating and embedding good practice. All of the strands of the TQEF support the dissemination and embedding of good practice. We have published two 'guides to good practice' to support our initiatives on institutional learning and teaching strategies (HEFCE 01/37) and widening participation (HEFCE 01/36). We expect to publish a further joint guide to good practice for learning and teaching and widening participation in July 2002.
  - c. Co-ordination and collaboration. We will continue to foster increased collaboration with other agencies and ensure that our initiatives complement those of other bodies.
  - d. Research and innovation. We will continue to build on the substantial innovation in learning and teaching already taking place in the UK higher education sector, and identify other areas where investment in research and development can best contribute to the learning experience of a diverse and expanding student population.
  - e. Building capacity for change. The capacity for change underpins each element of our strategy.

### Development of the TQEF within a new policy environment

11. In her letter of guidance which informed us of our grant for 2002-03, the Secretary of State for Education and Skills, the Rt Hon Estelle Morris MP stated that:

'As we continue to promote our widening participation and access policies, academic standards and the quality of the student experience must be maintained and enhanced. The quality of teaching is the chief factor in determining whether students gain from

higher education, and I look to the Council to invest in programmes designed to raise the quality of teaching in higher education.'

12. The continued development of the TQEF, as well as other initiatives we support, will promote the enhancement of the quality of learning and teaching.

### **National areas of priority for learning and teaching in HE**

13. The Government has said that 50 per cent of young people should have the opportunity to benefit from higher education by 2010. This target has both an economic and a social purpose. More graduates are needed to enable the UK to sustain and develop a knowledge economy able to compete globally. And fair access for those from disadvantaged backgrounds to all forms of education, including higher education, is an essential part of addressing social exclusion.
14. We want to have a clear strategic alliance between our strategies for learning and teaching, widening participation, and disability, within a framework that has the key objective of maintaining and improving quality and standards in learning and teaching.
15. To achieve our strategic objectives, and support delivery of the overall target for increased participation in higher education, we need to work in partnership with the higher education sector to effect change in a number of key areas. These include the following national areas of priority:
  - widening participation
  - ensuring fair access to higher education
  - maintaining and improving retention rates
  - enhancing the employability of graduates and diplomates
  - encouraging and disseminating good and innovative practice in support of high quality learning and teaching.
16. The funds provided within the institutional strand of the TQEF for the implementation of learning and teaching strategies must support activities relating to one or more of the national areas of priority set out in paragraph 15.
17. To inform discussions about the actions needed to achieve the Government's 50 per cent target, we undertook a comprehensive analysis of trends in the supply and demand of student places in higher education (HE). The report, 'Supply and demand in higher education' (HEFCE 01/62) was published in October 2001. The report showed that there has been little increase in the proportion of 16 year-olds staying on in full-time education and training or in subsequent educational attainment, since 1994. On current trends there will not be a significant increase in the supply of qualified applicants to higher education based on the numbers achieving A-levels or advanced vocational qualifications. The report also showed a marked skew in HE participation by socio-economic group. Those in the highest socio-economic group are seven times more likely to enter HE than those in the lowest group. So the greatest scope for increasing

participation in HE lies in the more disadvantaged groups in society who are currently under-represented.

18. In response to this, the HEFCE and the Learning and Skills Council (LSC) launched Partnerships for Progression, a joint initiative designed to raise the aspirations of school and college pupils from these under-represented groups. The proposals for the HEFCE/LSC partnership were put out for consultation (HEFCE 01/73) with responses requested from the sector by 22 March 2002.
19. In view of the changing policy environment for higher education and the new learning environment that is developing as we broaden the intake of students into higher education, we have decided to link the development of the TQEF to the national areas of priority listed in paragraph 15. The funding provided through the institutional strand of the TQEF will give all higher education institutions (HEIs) the opportunity to ensure that their learning and teaching strategies better reflect the challenges for the sector in the delivery of the new student learning environment.
20. Each of the national areas of priority will impact to varying degrees on each higher education institution; set different challenges for each; and will have implications for the way they develop and implement their learning and teaching strategies. We need to ensure that all HEIs can manage the changes required in the new learning environment that will result from the policy drivers outlined in paragraph 15. We aim to facilitate and support this capacity for change through the three strands of the TQEF.

#### Related HEFCE initiatives

21. In recognition of the interdependence of activities and programmes focusing on widening participation and learning and teaching, we have set out in a consultation document published in April 2002 our proposals for widening participation in higher education in the period 2003-04 to 2005-06 (HEFCE 02/22). The response date is 19 July 2002.
22. We have also invited applications for a three-year special funding programme to improve provision for students with disabilities (HEFCE 02/21). This programme will cover 2002 to 2005.
23. In May 2002 we will publish our Race Equality Scheme as required by the Race Relations (Amendment) Act 2000. The Act requires that the HEFCE examines and reports on whether institutions are meeting the general and the specific duties under the Act. Both the HEFCE and institutions need to ensure that all relevant functions and policies meet the general duty of the Act, to:
  - eliminate unlawful discrimination
  - promote equality of opportunity
  - promote good relations between people of different racial groups.
24. We will consult the sector and other stakeholders on our Race Equality Scheme during summer 2002.

## Formative evaluation of the TQEF

25. In May 2001 we commissioned independent consultants to undertake a formative evaluation of the TQEF. Key findings are at Annex B. The evaluation concludes that although the funds we invest for the TQEF are relatively small, the impact has been significant. The fund has also helped to gear up matching institutional funds. In establishing the TQEF in 1999 we expected the funding to act as a catalyst for extending existing activity or generating new activities, and to encourage other institutional resources to be directed at delivering institutional learning and teaching strategies. The formative evaluation indicates that good progress has been made, and that the TQEF has supported the capacity for change across the sector. In particular, the institutional strand has acted as a powerful lever for enabling and accelerating change.

## **TQEF funding from 2002-03**

### Institutional strand

26. The institutional strand of the TQEF will continue to support HEIs in developing and implementing their strategies to improve learning and teaching in HE. We expect this strand of funding to be directed at achieving the national areas of priority set out in paragraph 15.
27. To support the institutional strand of the TQEF, we will publish good practice guidance and organise regional seminars in the following areas:
- 'Recognising and rewarding excellent teachers': 15 May 2002, Coventry and 30 May 2002, Manchester
  - 'Funding innovation and embedding change': 2 July 2002, Coventry and 8 July 2002, Manchester
  - 'Maximising the benefits to undergraduates of research strengths': 17 September 2002, Coventry and 23 September 2002, Manchester.
28. Further details of these seminars can be obtained from the TQEF National Co-ordination Team (contact details at Annex F).
29. To encourage the development and maintenance of high quality throughout the sector, our support within this strand of the TQEF will continue to be inclusive rather than selective. Therefore, all HEIs will be entitled to this funding on submission of revised learning and teaching strategies and action plans. HEIs will need to demonstrate that their target outcomes are specific, measurable so far as possible, realistically challenging, relate to a timetable for completion and have clear milestones so as to provide a firm basis for subsequent monitoring.
30. We expect to allocate £16 million to this strand of the TQEF in 2002-03, £17 million in 2003-04, and £17 million in 2004-05. Allocation of funds will be determined by formula,



using the standard resource for teaching funding as the base. Annex E indicates the level of funding for each institution.

31. Paragraphs 55 to 70 of this document explain what institutions need to do to receive this funding. Annex D provides the template for the information required in the action plans. Note that a separate action plan is required for each year of funding.

#### Subject strand

32. We are supporting the subject strand of the TQEF through two streams of funding: the UK-wide Learning and Teaching Support Network; and phases four and five of the Fund for the Development of Teaching and Learning.

#### Learning and Teaching Support Network

33. Launched in January 2000, the LTSN is funded by the four higher education funding bodies in the UK. It is managed and co-ordinated by an executive based in York and co-located with the Institute for Learning and Teaching (ILT). Its 24 subject centres are a mix of single-site and consortium-based centres, all located within relevant subject departments of higher education institutions.

34. The LTSN provides support and development opportunities to all who work in teaching or the support of learning in UK higher education. In addition to the subject centres that offer subject-specific expertise and information, the LTSN has a Generic Centre which addresses learning and teaching issues that cross subject boundaries. The network also includes the Technologies Centre and Technology for Disabilities Information Service.

35. The LTSN aims to:

- promote and transfer high quality learning and teaching practices in all subject disciplines
- provide a 'one stop shop' of learning and teaching resources and information for the whole higher education community
- develop and support networks of practitioners.

36. The LTSN is one of the key ways in which we enable the support and dissemination of innovatory practice. Consequently, we directed applicants under phase four of the FDTL to establish a relationship with the relevant LTSN subject centre or Generic Centre, to ensure that the network is a central element of future FDTL projects' dissemination strategies.

37. The LTSN is undergoing formative evaluation. The independent evaluation team has said that the LTSN is contributing effectively to the promotion of high quality learning and teaching, and is playing an increasingly significant role in facilitating change in learning and teaching in higher education. Key findings from the interim formative evaluation of the LTSN are at Annex C.

38. In the light of its successful progress, all the funding bodies have confirmed their funding for the LTSN until December 2004. The funding for England is set out in Table 1.
39. Continuation of funding for the LTSN is conditional on the LTSN and programme executive reflecting the key national priorities (see paragraph 15) within its strategic planning and operational objectives. As with other strands of the TQEF, we shall wish to see from the LTSN the establishment and attainment of targets that are achievable and measurable.

#### Fund for the Development of Teaching and Learning

40. In October 2001 we launched phase four of the FDTL (HEFCE 01/60). The aims of phase four are to:
  - stimulate developments in learning and teaching
  - secure the widest possible involvement of institutions in the take-up and implementation of good practice.
41. The primary focus of FDTL is to develop, disseminate and embed good practice in learning and teaching throughout the higher education sector.
42. The FDTL programme has always been closely linked to the Quality Assurance Agency for Higher Education (QAA) subject review process, with phases of the FDTL relating directly to rounds of QAA subject reviews. For example, applications to phase four of the FDTL had to relate to one or more of the 13 subject areas reviewed by the QAA between October 1998 and September 2000. Further, FDTL applicants are required to have been awarded quality approved status and a grade four in the aspect of provision for which funds are sought.
43. In phase four of the FDTL we made greater use of the subject review process than in previous phases, by identifying subject and generic priority areas for learning and teaching development derived from the subject overview reports.
44. In addition, to ensure a synergy of activity within the subject strand of the TQEF, applicants are required to consult and include the relevant LTSN subject centre and/or Generic Centre in their dissemination strategy. In this way, we aim to ensure that FDTL phase four projects are linked into other learning and teaching developments, and that the positive impact of project outcomes is maximised. A consequence will be that projects will provide subject centres with high quality material which they can share with their subject communities. This should give greater opportunities for project developments to become embedded in learning and teaching across the sector. In turn, the projects are provided with an effective continuation strategy via the subject centre network and a sustainable site for their development.

45. Phase four of the FDTL also encouraged applicants to consider how the activity links to their institution's learning and teaching strategy and, where appropriate, its human resources strategy and widening participation strategy. In the context of widening participation, applicants are encouraged to consider how their project outcomes can be made accessible to a diverse student population.
46. FDTL funding arrangements are set out in Table 1. We intend to issue the invitation to bid for phase five of the FDTL in autumn 2003. An invitation will be published and distributed to HEIs and eligible further education colleges (FECs) nearer the date.
47. Subject areas eligible for funding under phases four and five of the FDTL are at Annex G.

#### Individual strand

48. The central purpose of the individual strand of the TQEF is to recognise and reward academics who have demonstrated excellence in learning and teaching. The allocation of funds for the National Teaching Fellowship Scheme (NTFS) is set out in Table 1. We will continue the two-pronged approach within the NTFS:
  - a. We will continue to provide £1 million a year to fund the NTFS. The scheme has run successfully and is in its third year of operation. Under the scheme HEIs nominate a member of staff for the award, 20 fellowships are awarded each year and each fellow is awarded £50,000. The scheme is managed for the HEFCE and the Department for Employment and Learning (DEL) by the ILT. Information about the NTFS can be obtained from the ILT (contact details at Annex F).
  - b. Institutions may wish to use part of the funding available to them for implementing revised learning and teaching strategies to strengthen their recognition and reward schemes for teaching staff, giving them greater capacity to reward high quality teaching.

#### TQEF National Co-ordination Team

49. The TQEF National Co-ordination Team (NCT), based at the Centre for Higher Education Practice at The Open University, co-ordinates projects funded within the FDTL on behalf of the HEFCE and DEL. The NCT:
  - provides educational development support for individual projects and for project staff
  - supports the management of individual projects
  - encourages co-ordination and connections across projects
  - collects and disseminates information on FDTL projects
  - provides advice and guidance to the HEFCE and DEL
  - facilitates the management of change in learning and teaching.

50. The NCT fulfils its responsibilities by:

- visiting projects and attending project events and meetings
- giving advice and feedback on questions and issues raised by projects
- running workshops and producing briefings on themes that are common across projects, such as project management, dissemination and evaluation
- sharing information across projects through a newsletter and web-site
- organising an annual conference.

51. The TQEF NCT is one of a number of HEFCE-funded national co-ordination teams which provide support, advice and guidance on priority policy areas. Details of these teams and other sources of information are at Annex F.

#### Support for higher education in further education colleges

52. Indirectly funded (franchised) provision which HEIs deliver through partnership arrangements with FECs will be included in calculating the institutional strand of the TQEF. Therefore in preparing strategies and deciding how to spend their allocations, HEIs should take account of their franchised provision as well as their own directly funded programmes, in order that all the students for whom the HEI is responsible can benefit from the activities to improve learning and teaching.

53. FECs with higher education funded directly by HEFCE will not receive institutional strand funding within the arrangements described above. A separate development fund for learning and teaching for HE in further education was established in 1999, and phase two of this fund was launched in January 2002. The total funding available for the second phase of this funding will be £18 million covering a period of three academic years from 2001-02 to 2003-04. The funding arrangements can be found in HEFCE 02/02.

#### Allocation of TQEF funds

54. The expected allocation of funds through the TQEF is shown in Table 1 below.

Table 1 **Expected allocation of funds through the TQEF 2002-03 to 2004-05**

<b>Activity</b>	<b>2002-03</b>	<b>2003-04</b>	<b>2004-05</b>	<b>Total</b>
Ongoing commitments to existing projects (FDTL/TLTP)	£4M			£4M
Implementing institutional learning and teaching strategies	£16M	£17M	£17M	£50M
National Teaching Fellowship Scheme	£1M	£1M	£1M	£3M
Subject development (FDTL phases four and five): innovation and enhancement	£3M	£5M	£5M	£13M
Subject-based LTSN	£6.5M	£6.5M	£7M	£20M
Co-ordination and evaluation of the TQEF	£605,000	£608,000	£787,000	£2M
<b>Total TQEF</b>	<b>£31,105,000</b>	<b>£30,108,000</b>	<b>£30,787,000</b>	<b>£92M</b>

## **Applying for TQEF funds for 2002-03 to 2004-05**

### **Background**

55. Following the publication of the Report of the National Committee of Inquiry into Higher Education in July 1997 (the Dearing Committee), and our subsequent consultation on the promotion of learning and teaching within the HE sector (HEFCE 98/40), we highlighted the promotion of learning and teaching strategies as a key priority. Learning and teaching strategies are essential – both to ensure institutional commitment to developing, maintaining and enhancing higher quality in learning and teaching, and to raise the profile and status of teaching within institutions.

### **Definition of a learning and teaching strategy**

56. An effective learning and teaching strategy will outline what an institution wants to achieve with regard to learning and teaching, how it will do so, and how it will know when it has succeeded.

57. The revised learning and teaching strategy should build on an institution's existing strategy; reflect the institution's mission; link closely with the institution's overall corporate plan; and link with other institutional strategies. It should be informed by previous experience in learning and teaching, and should demonstrate how the effectiveness of the strategy will be monitored by the institution.

### **Content and structure of the strategy**

58. Institutions prepare learning and teaching strategies primarily for their own purposes, not for the HEFCE's. So far as possible, we will leave it to institutions to determine the content and structure of their revised strategies. However, to encourage good practice we would encourage institutions to include:

- objectives which are explicitly linked to the institution's corporate plan
- objectives which are explicitly linked to the institution's widening participation strategy, disability statements, and to other relevant strategies such as for human resources and estates
- objectives which are designed to meet the needs of an expanding and diverse student population
- targets whose achievements can be objectively demonstrated, through milestones or other measurable outcomes
- details of specific policy processes and changes that are designed to enhance the quality of learning and teaching, including recognising and rewarding excellence
- named individuals or post holders responsible for delivering each element of the strategy
- monitoring and evaluation procedures.

59. In addition we encourage institutions to have a revised learning and teaching strategy and action plan that:
- promote equality of opportunity
  - consider the requirements of both the Race Relations (Amendment) Act 2000 and the Special Educational Needs and Disability Act 2001
  - ensure that students are not disadvantaged on the basis of their religious beliefs or their sexual orientation.
60. We also encourage institutions to address the national areas of priority, as set out in paragraph 15, in their revised strategies and action plans.
61. We will use the action plan provided by HEIs to monitor the use of TQEF funding within the institutional strand. Institutions should provide a separate action plan for each year of funding to allow progress against targets to be monitored more effectively. The targets should be specific, measurable so far as possible, achievable, realistically challenging, relate to a timetable for completion and with clear milestones. Although it may be some time before the outcomes of the revised strategy can be assessed, it should be possible to check annually on the achievement of targets and objectives. Milestones should therefore be included, which will be reported on in the annual operating statement to be returned to us in July of each year.
62. Targets should include both outputs and outcomes. Output targets reflect the processes required to achieve an outcome. They can provide milestones against which progress can be reported in the annual operating statement. Outcome targets demonstrate the success of an activity, compared with objectives or benchmarks.
63. It is recognised that where there are significant changes, the outcome targets in particular might need to be reviewed and revised during the funding period in the light of annual achievements. Institutions may also wish to update their action plans to take account of experiences in the first or second year of their revised strategy. However, in the first instance, institutions should plan for three years based on their experiences of their existing strategies.
64. Where an HEI has indirectly funded partnerships with FECs to deliver all or part of HE courses, its strategy should include a section on the enhancement of learning and teaching in those partner FECs.

### **How to apply for funds**

65. We will fund activities to deliver aspects of revised learning and teaching strategies, rather than the creation of the revised strategies themselves. All institutions should submit information in a standard format detailing the activities to be funded by us and how these link with their strategic objectives (see Annex D).

66. Institutions should submit five copies of their revised learning and teaching strategy and action plan, to include details of the activities to be funded, to Victoria Martin at the HEFCE by Friday 26 July 2002. Both documents should cover the three-year period 2002-03 to 2004-05.

### **Allocation process**

67. To confirm each institution's funding allocations, we will not assess the strategy itself. Rather we will consider the activities described and how well they fit with the accompanying strategy and other information such as the institution's corporate plan, disability statement, widening participation strategy, and other relevant documents.
68. We will consider the information submitted by institutions during August and September 2002. We expect to confirm the funding allocation from the institutional strand of the TQEF by late October 2002. As this is an entitlement fund, rather than a competitive bidding process, we anticipate that all institutions which submit satisfactory details of activities to be funded, in line with an accompanying revised learning and teaching strategy, will receive their full funding allocation.
69. Decisions on funding for 2002-03 will be made in late October 2002. Annex E outlines institutions' funding within this strand of the TQEF. We intend to allocate the funding for the three-month period August to October 2002 within our payment to institutions in November 2002.
70. Funding for future years (2003-04 and 2004-05) will be released on the production and approval of a statement of progress towards targets set in the original submission. This statement will continue to form part of the institution's annual operating statement to be returned to us in July each year from July 2003. It will need to show that the revised strategy is being implemented and monitored effectively, and is either meeting or making progress towards measurable targets and outcomes. This process is consistent with our approach to monitoring special funding programmes as described in HEFCE 99/30. It reduces the burden on institutions and places the learning and teaching strategies within the context of the institutions' corporate plan. Institutions are still expected to submit a statement of progress against the targets in their existing learning and teaching strategies within their annual operating statement to be submitted in July 2002. HEFCE 02/19 outlines the information required from HEIs in their annual operating statements for 2001-02.

### **Promoting and transferring good practice**

71. A good practice guide to learning and teaching strategies was published by the HEFCE in July 2001 (HEFCE 01/37). A joint learning and teaching and widening participation good practice guide is expected to be published in July 2002. HEFCE 01/37 can be accessed via the HEFCE web-site under 'Publications'.