



SFC Guidance

Annex A

**Guidance for the development of University Outcome Agreements: 2018-19
to 2020-21**

Annex A: Self-evaluation report

What?

1. A brief factual report comprising:
 - Reflection on available statistical data.
 - Qualitative and quantitative progress in the preceding year, including specific reference to published milestones (recognising that, for the year in question, audited statistical data will not be available and that we rely on institutions' own data at this point in time).
 - Early thoughts on progress in the current year (for example, towards recruitment targets, any internal evidence on retention).
 - Rationale for any proposed changes to targets in the draft Outcome Agreement.
2. The report should be approximately five to six pages.
3. The report should be signed off by the Principal or head of institution on behalf of the governing body.
4. For the self-evaluation of AY 2016-17 we wish HEIs to comment on progress against specific commitments against the priorities featured in the 2017-18 guidance. These were:
 - Access to Higher Education¹.
 - High Quality, Efficient and Effective Learning.
 - Right Learning, Right Place.
 - A Developed Workforce.
 - Internationally Competitive Research Base.
 - Greater innovation in the economy.
 - Sustainable Institutions.
5. We would specifically like to see:
 - Progress on widening access, articulation and retention.
 - Early indications on delivery of additional strategic funded places for AY 2017-18.
 - Delivery against the institution's AY 2016-17 UIF plan.

When?

6. The report is due by 31 October 2017.

¹ For reviewing progress over AY 2016-17 institutions should use SIMD 2012. Progress from AY 2017-18 onwards will be assessed using SIMD 2016.

Why?

7. To provide universities with an early opportunity to identify highlights and challenges from the preceding year, recognising that audited HESA data will not be available.
8. To provide universities with an opportunity to review and where appropriate revise milestones towards three year targets - we would not normally expect three year targets themselves to change, unless external circumstances had also changed significantly.
9. To sit alongside periodic in-year data and statistical collections carried out by SFC that inform the Outcome Agreement process.

Further information

10. Contact your institution's Outcome Agreement contact for further information.