

UNIVERSITY OF TEESSIDE

ACCESS AGREEMENT

Cover sheet – Updated 16-02-05

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Date:	23 December 2004

1. Bursaries and other financial support for students to be provided from estimated additional fee income.

(i) Bursaries

The University will also introduce Bursaries directed at those from less affluent backgrounds.

- For students with a family income which entitles them to receive the full Maintenance Grant of £2,700 (currently approximately 25% of the University's intake) the bursary will be £1,300 per year of study.
- For students with a family income which exceeds that which entitles them to the maximum Maintenance Grant but which is less than £25,000 a year, the bursary will be £500 per year of study (currently approximately 31% of the University's intake).

These bursaries will be payable to all full-time home and EU students who are liable for tuition fees at the full rate of £3,000 and who meet the above criteria.

(ii) Welcome Grants

The University will also introduce a bursary in the form of a "Welcome Grant" of £500 for all home and EU first year students who do not receive support from the income-related bursaries outlined in (i) above which will be paid over the first year only. Currently, approximately 7% of the University's intake falls into £25,000 - £33,000 residual income band.

(iii) Scholarships

The University will also introduce a minimum of 250 scholarships per annum of up to £1000 per year, normally payable for the entire period of undergraduate study

(excluding periods of work placement). Although principally determined by criteria relating to high levels of previous academic attainment, these will be used to attract good quality applicants from those groups with whom the University has undertaken outreach work to raise aspirations in order to encourage them to realise their full potential.

2. Nature and cost of outreach activities to be funded through estimated additional fee income and also from other sources

The total *additional* cost of outreach activity including infrastructure costs will be £1,220,000.

These additional costs will arise as a result of a number of activities such as:

- extending existing raising aspirations and widening participation activities (i.e. initiatives such as Meteor, Passport and Summer College)
- introduction of further specific measures to encourage mature students;
- increased staffing costs associated with the provision of additional student support and guidance
- increased ICT infrastructure costs; and
- other marketing and advice/guidance activities prior to, and following, 2006/7.

3. Institutional milestones and objectives, including institutional baseline data

Baseline Data and Performance Targets

Hefce Indicator	Performance Targets <i>(ALL targets are based on performance relative to that in the most recent (2002/3) Hefce indicators)</i>	Baseline Data (%) (2002/03)		
		Actual	Benchmark	Differential
T1B: Young FT UG entrants from Socio-Econ. Classifications 4 -7	To maintain the existing differential between the actual level achieved and our performance benchmark.	42.6%	37.7%	+ 4.9%
T1B: Young FT UG entrants from low participation neighbourhoods	To maintain the existing differential between the actual level achieved and our performance benchmark.	27.1%	16.9%	+ 10.2%
T2B: Mature FT UG with no previous HE Experience from low participating neighbourhoods	To maintain the existing differential between the actual level achieved and our performance benchmark.	25.5%	17.3%	+ 8.2%

Milestones

- To maintain the existing comprehensive outreach activity
- To extend membership of the University's Passport scheme by adding an additional two new institutions per year from within the North East and/or

North Yorkshire regions each year over the period covered by the Access Agreement (6 in total).

- To increase by 5% the number of applications made to Higher Education by members of the University's Passport Scheme.
- To maintain the current level of on campus raising aspirations and widening participation activity and incorporate a student 'awareness, advice and guidance' funding element within those activities (currently 150 per year).
- To offer student funding 'awareness, advice and guidance' information events to approximately 250 institutions per year.
- To offer to at least 50% of the University's major feeder institutions the opportunity to select from a range of student funding 'awareness, advice and guidance' information events to be delivered off-site.
- To increase the current level of on-campus events for mature students from the current level of 6 per year to 8 in total in 2006/7, 12 in total in 2007/8, and 20 in total 2008/9.
- To establish an Adult Passport Scheme and offer the opportunity of membership of this scheme to a minimum of 170 adults in total in 2006/7, 215 in total 2007/8, and 250 in total in 2008/9.

4. Total amount to be spent on access measures (including financial assistance); how much of that total expenditure is additional as a result of the access agreement?

Total spend is currently £7.28 million of which £7.05 million per annum is funded through HEFCE core grant, Widening Participation funding, special initiatives and access/hardship Funds.

As a result of the Access Agreement this figure will increase, in the first year, by a further £1.87 million in 2006/7 to a level of £9.15 million per annum (an increase on current levels of expenditure of 25.7%).

5. Relationship between this additional expenditure and the estimated additional fee income.

The total estimated additional income from variable fees over the three years of the plan is £22,246,200. The total estimated additional expenditure in the same period, arising from the University's extended raising aspirations, outreach and widening participation activities, is £8,148,700. This leaves an excess of income over costs of £14,097,500 – making the total additional expenditure 36.63% of the increased variable fee income. In 2006 the total additional expenditure will be 45.28% of the increased variable income.

UNIVERSITY OF TEESSIDE

ACCESS AGREEMENT – Updated 16-02-05

a) Level of fees or fee limits

Our primary target over the period of the Access Agreement is to maintain full time undergraduate recruitment at, or only slightly above, its current level whilst expanding part time recruitment (particularly through Foundation Degrees), postgraduate recruitment (both part time and full time), and overseas recruitment.

From 2006 the University proposes to charge £3,000 p.a. tuition for all full-time, HEFCE funded undergraduate provision (i.e. delivered directly at the University or indirectly through partnership arrangement)s.

The University will maintain tuition fees for part-time courses at a level broadly equivalent to levels charged in the academic year 2004/05.

The plan covers a three year period and it is proposed that the fee levels will rise in line with inflation throughout that period.

b) Bursaries and other financial support for students

The University intends to introduce a range of Bursaries and Scholarships for students from 2006.

1) Income Related Bursaries

The University will also introduce Bursaries directed at those from less affluent backgrounds.

- For students with a family income which entitles them to receive the full Maintenance Grant of £2,700 the bursary will be £1,300 per year of study.
- For students with a family income which exceeds that which entitles them to the maximum Maintenance Grant but which is less than £25,000 a year, the bursary will be £500 per year of study.

These bursaries will be payable to all full-time home and EU students who are liable for tuition fees at the full rate of £3,000 and who meet the above criteria. All bursaries will be paid in cash.

The notion of family income may include parental or spousal income as relevant, but will exclude any income of the student.

The University will seek to establish a broad relationship between the thresholds for its bursary scheme and the thresholds for Educational Maintenance Allowances. The University believes that this will enable the system to be easily explained to and understood by a large proportion of potential applicants.

The precise thresholds may be subject to change and adjustment over the lifetime of this agreement in line with changes in the statutory system of student support and the thresholds for Educational Maintenance Allowances, but the principle will be that students will continue to receive the bursary determined by the level of income assessed at the start of their course.

2) Welcome Grants (First Year Bursaries)

The University will also introduce a once-only Welcome Grant (First Year Bursary) of £500 for all home and EU first year students who do not receive support in the form of an income-related bursary, which will be paid over the first year only. This bursary is to recognise the additional costs that students often face in establishing a new life as a student – particularly for those students who may come from a background with little or no experience of Higher Education. Currently, approximately 7% of the University's intake falls into the £25,000 - £33,000 residual income band. A percentage of this expenditure has therefore been included in the schedule of income and costings shown on Page 9.

3) Scholarships

The University will also introduce a minimum of 250 scholarships p.a. of up to £1000 per year, normally payable for the entire period of undergraduate study (excluding periods of work placement). Although principally determined by criteria relating to high levels of previous academic attainment, these will be used to attract good quality applicants from those groups with whom the University has undertaken outreach work to raise aspirations in order to encourage them to realise their full potential.

c) Widening participation and outreach activities

In supporting the transition to a system of tuition fees and bursaries, the University will draw on its positive experiences of widening participation in a regional context. The University will seek to maintain its extensive commitment to widening participation in the North East region by continuing to encourage the engagement of students from socially disadvantaged and low participation areas in further and higher education by maintaining current levels of activity. A table summarising existing widening participation activities is attached at Appendix 1.

In addition to the existing activities listed in Appendix 1 the University will:

- Introduce a range of additional student activities to add to the current range of pre-entry activity ('Passport' transition events)
- Incorporate information, advice and guidance relating to fees, bursaries and scholarships into all existing pre-entry Passport and transition events.
- Offer to at least 50% of major feeder institutions the opportunity to select from a range of student funding interventions to be delivered off-site.

An important element of the existing widening participation strategy is through the engagement of adults, and particularly those adults seeking to enter, re-enter or progress within the labour market and whom are disadvantaged in doing so by previous low levels of formal educational attainment.

This is particularly important in the North East region due to the region's long history of chronic under-achievement and low staying-on rates. Existing activities in this area include, inter alia:

- the funding of outreach workers;
- flexible degree entry routes which acknowledge APEL and provide individualised guidance and routes.

In addition to these and to support widening access for mature students the University will:

- increase the funded programme of on- campus activities to which potential adult learners are recruited (culminating in a programme of short courses under the 'Summer College' and 'Summer University' banners);
- develop an 'Adult Passport' scheme for Access students;

The University recognises the value of students from underrepresented groups in encouraging the aspirations and developing the intentions of others from their communities. This is recognised by the use of these students as role models and mentors in the University's extensive outreach work. The University also recognises that these students often face a greater task in managing a successful transition into Higher Education. This is particularly the case with those from backgrounds where there is little or no history of previous participation. The University therefore plans to introduce the new role of 'Student Support Officer' – as a result of which it will appoint individuals who will work to support students in managing the transition from initial application into and through Higher Education. These new appointments will develop existing good practice in order to reinforce a positive experience of Higher Education and will ensure that the University remains aware of, and responsive to, the particular needs of students from non-traditional backgrounds.

The University has a mature strategic partnership ('The University of Teesside Partnership') with all six FECs and all six Sixth Form colleges in the Tees Valley, along with two neighbouring County Durham FECs, Derwentside and Bishop Auckland. In addition to working together as 'core' partners in progression activities, we are jointly seeking to widen access by the development of 'distributed HE learning centres' within college premises to provide accessible 'first step' HE in the form of a range of UCPDs¹, Higher National Certificates and Diplomas and a growing number of Foundation Degrees. There are more than 1300 students currently studying within the partnership and the planned growth is underpinned by successful Foundation Degree ASN bids in 2002/3 and 2003/4 which has allocated 1326 FTE places to the Partnership. We anticipate giving reality to the 'distributed learning' concept by creating "University Centres" as part of Darlington College's new building programme and Hartlepool College of Further Education's campus refurbishment through a successful Strategic Development Fund bid to HEFCE. We have evidence that this strategy is widening participation, both in encouraging less confident students to benefit from the more secure and accessible environment of their local FE college as well as our growing ability to reach into sectors and the workforce in those sectors who have not previously been offered HE progression pathways, via Foundation Degrees.

¹ University Certificate in Professional Development, normally 20 credits at HE Level One

The University of Teesside has played a leading role in the development of a Regional Lifelong Learning Network for the North East Region. In targeting 'young people and adults in the workforce' we aim to widen participation to vocationally qualified employees and to those employees whose knowledge and skills have been developed in the workplace but are not formally accredited. The LLN envisages significant infrastructural developments to access and vocational higher education pathway opportunities which are supported by employers and underpinned by timely information, advice and guidance.

d) Communication to prospective students

The University will ensure that all prospective students are informed of the aggregate amount of fees that the institution will charge for the completion of the course.

The University intends that its bursary schemes will be straightforward and simple to understand. The University will supplement its existing work on student financial advice and guidance through the appointment of 2 additional Advice and Guidance staff to ensure that sufficient resource is available to make sure potential applicants are aware of the schemes and how they might impact upon them.

The provision of information to students will compliment the existing highly respected and successful forms of advice and guidance which are detailed in Appendix 2: Communications with Applicants.

The University processes for communicating with potential applicants are through the following mechanisms.

- Information directly into schools via local, regional and national mailings for distribution to students
- Information and events targeted at professionals in the advice and guidance and subject specialists (Heads of Sixth Forms/Heads of Careers/Subject Teachers)
- Face to face activities through the recruitment team at Higher Education Fairs, Parent's Evenings and Careers and Options events – locally, regionally and nationally
- Standard publications which reach a wide audience e.g. prospecti and newsletters, course specific information
- Web-site information – FAQ's and Virtual Adviser
- A schedule of pre-entry activities delivered into schools/colleges and on-campus via our Passport Scheme e.g. Discovery Days, Lecture Series, Masterclass, Transition activities, Open Days, Applicant Open Days, Visit Days

The University will, in the Spring of 2005, introduce and embed a student funding element into all of these information and pre-entry activities and will also enhance its provision of individual advice and guidance to applicants through the extension of its financial advice services. This will provide additional information about the costs of study (including tuition and living costs), the availability of funding to support study and support in developing money management skills.

e) Total amount to be spent on access measures

Infrastructure Costs

To support the additional communication and financial assessment needs, and additional outreach activity the University has identified the following additional infrastructure costs.

- Two additional student advisors within the University's Student Services Department who will be responsible for advising students and administering the bursary/scholarship scheme.
- One post with responsibility to disseminate the details of the changes to student funding and the potential benefits of the Teesside proposals. This will supplement the work which has already started by existing University staff.
- It is anticipated that if students are to be required to pay more for their education then there will be greater pressure on the University to try and ensure their successful completion of their studies. It is therefore proposed that the University appoint up to 6 Student Support Officers to build upon the University's successful research and activity in transition management into Higher Education. In addition to work in supporting applicants through the application and admissions process, these new posts will enhance the student support experience throughout their studies at the University.
- Like the financial support that we receive for PG bursaries, most of the funding for widening participation/raising aspirations initiatives (like Meteor, Student Ambassador and Passport) is also coming to an end (in March 2005), and the University needs to identify other funding streams if this activity is to be protected. It is therefore proposed that the University agree to invest £100K p.a. of its variable fee income in supporting the continuity of these important initiatives.
- There will be some limited 'up-front' ICT systems costs of c.£60,000 to purchase some 'postcode' software and a bolt-on adaptation to SITS to enable us to identify and monitor applications from low participation neighbourhoods.
- The University has given a commitment to spending £200,000 specifically on awareness raising activities prior to the introduction of the Access Agreement, which will be used to fund a range of marketing, promotion, and student/advisor information activities .

Summary data of estimated income and costs associated with the implementation of the Fees and Bursary Strategy

	Year 1 (2006/07)		Year 2 (2007/08)		Year 3 (2008/09)	
	Est. Students	Income	Est. Students	Income	Est. Students	Income
<u>Variable Fee Income</u>						
Total Income from Variable Fees	2300	4,140,000	4252	7,653,600	5807	10,452,600
<u>Bursary Strategy Costs</u>						
Bursaries for less affluent students	Students	Cost	Students	Cost	Students	Cost
residual family income <£15,000 p.a. (£1300 p.a. to consist of £300 mandatory + £1000 discretionary bursary)	575	747,500	1063	1,381,900	1451	1,886,300
residual income of £15,000 - £25,000 p.a. (£500 p.a. discretionary)	713	356,500	1318	659,000	1800	900,000
Welcome Grants - £500 Residual income of £25,000 - £33,000 p.a.	161	80,500	298	149,000	406	203,000
Scholarships up to £1000 p.a.(all UK/EU FT students) <i>from low participation neighbourhoods*</i>		100,000		190,000		275,000
New Post - Top up Fees Advisor/Marketing Officer		30,000		30,000		
New Posts - Student Financial Advisors (x2)		50,000		50,000		50,000
Funding to support Raising Aspirations/Widening Participation Activity eg. Meteor and Passport <i>Including the appointment of up to 6 Student Support Officers</i>		250,000		250,000		250,000
IT Infrastructure		60,000				
Raising awareness activities including marketing and student advisor activities prior to 2006/07		200,000				
Sub Total		1,874,500		2,709,900		3,564,300
Excess of Income over Cost		2,265,500		4,943,700		6,888,300
Bursary Costs as % of increased variable fee income		45.28%		35.41%		34.10%

Assumptions

1. Numbers of students likely to receive bursaries in each category are estimates based on current profile
2. FT home undergraduate recruitment to remain static
3. Attrition rates included
4. The criteria for qualification for a bursary will be applied equally to all home and EU students.
5. The University has assumed that a 35-40% of the funding that is made available for Scholarships will directly support students from low participation neighbourhoods.

f) Milestones and objectives

The University has already exceeded the HEFCE national and location adjusted benchmarks and has a national reputation for its widening participation and outreach activities.

As the University currently attracts around 27% of its existing student intake from low participation backgrounds and 42% from Socio-Economic Classifications 4 to 7, it is likely that the increased investment by other Universities in widening participation activities will have some direct impact on our ability to sustain or further enhance our recruitment from these groups and hence it is with this in mind that the following our nominated statistical benchmarks below are linked to maintaining our current excellent level of performance, rather than seeking to significantly enhance it further.

Statistical Analysis

Performance Targets (linked to Hefce Performance Indicators)

T1B: Young Full Time Undergraduates from Socio Economic Groups 4-7: maintain the existing differential based on the most recent 2002/3 Hefce indicators between the actual level achieved and our performance benchmark (Currently +5%).

T1B: Young Full Time Undergraduates from low participation neighbourhoods: maintain the existing differential based on the most recent 2002/3 Hefce indicators between the actual level achieved and our performance benchmark (Currently +10%).

T2A: Mature Full Time Undergraduate entrants (% of mature entrants who are mature with no previous experience of HE from low participation neighbourhoods): maintain the existing differential based on the most recent 2002/3 Hefce indicators between the actual level achieved and our performance benchmark (Currently +8%).

In addition to this it is intended to purchase a software package so that a more detailed analysis of widening participation by postcode can be carried out at School and Programme level. The level of sophistication of the analysis will develop throughout the duration of the plan. This will also allow more direct targeting of outreach and marketing activity.

Milestones for Outreach Activity

- To maintain the existing comprehensive outreach activity
- To extend membership of the University's Passport scheme membership by adding an additional two new institutions per year from within the North East and/or North Yorkshire regions over the period covered by the Access Agreement (6 in total).
- To increase by 5% the number of applications made to Higher Education by members of the University's Passport Scheme.

- To maintain the current level of on campus raising aspirations and widening participation activities and incorporate a student 'awareness, advice and guidance' funding element within the activities (currently 150 per year).
- To offer student 'awareness, advice and guidance' funding information events to approximately 250 institutions per year.
- To offer to at least 50% of the University's major feeder institutions the opportunity to select from a range of student 'awareness, advice and guidance' funding information events to be delivered off-site.
- To increase the current level of on campus events for mature students from the current level of 6 per year to 8 in total in 2006/7, 12 in total in 2007/8, and 20 in total 2008/9.
- To establish an Adult Passport Scheme and offer the opportunity of membership of the scheme to at least 170 in total in 2006/7, 215 in total 2007/8, and 250 in total in 2008/9.

g) Monitoring

The University will produce an annual monitoring in December /January of each year a report for inclusion in the Hefce Annual monitoring statement for HEIs which will draw upon:-

- (i) An analysis of the Hefce performance indicators as identified above
- (ii) A commentary on the additional outreach activity against the defined milestones
- (iii) An analysis of the level of support given to students through the bursary strategy

The report will be presented to the Academic Board, the Corporate Management Committee and a summary report to the Board of Governors.

STUDENT LIFE CYCLE AND WIDENING PARTICIPATION

ACTIVITY

Stage	Young People	Adult Learners/Part-time Learners
Aspiration Raising	<p>Meteor Scheme - Year 6-9 (10 Primary Schools, 7 Secondary Schools)</p> <p>Student Ambassador Scheme - years 9-11 (Six Secondary Schools)</p> <p>National Mentoring Scheme - years 9-11 – Tees Valley wide – Schools and Further Education Colleges</p> <p>Excellence in Cities - Widening Participation Strand</p> <p>AimHigher regional/national activities for widening participation and gifted and talented pupils</p> <p>Science, Technology, Engineering and Mathematics – SETPOINT North East – interventions at all Key Stages</p> <p>AimHigher ESF/HEFCE HE Summer Schools (gifted and talented)</p> <p>Master Classes Subject Tasters Open Days /University Visits</p> <p>Passport Scheme - post-16 (26 institutions)</p>	<p>Tasters</p> <p>Partnership with FE Sector - tasters, small bites</p> <p>Adult Learner's Week – tasters in outreach centres with partner colleges</p> <p>Advice and Guidance Office – Course Information Centre and through Community Learning Advisers</p> <p>University visits and tours</p> <p>Community Learning Advisers</p> <p>Part-time Open days</p> <p>Community capacity building –</p> <p>Community Learning Team and Community Informatics Research Application Unit (CIRA)</p> <p>Passport Scheme – adults (proposed)</p>
Pre-entry	<p>AimHigher Summer School, - tasters, academic and social activities</p> <p>Passport Scheme - early application/advice on application</p> <p>Open Days and Visits</p> <p>Science, Technology, Engineering and Mathematics interventions – to support HE applications</p> <p>Higher Education Fairs and input into Careers Education Programmes</p> <p>Course Information Centre</p> <p>Discovery Days (Subject Tasters)</p> <p>Speakers into Schools</p>	<p>Access Open Day - subject and financial advice</p> <p>QAA recognised Access Programmes, Work-based access</p> <p>Summer College - FE level short courses, skill based and subject study</p> <p>University visits for students making transition from outreach locations to University</p> <p>Summer College - pre-entry skill based and subject module</p> <p>One to one advice and guidance through the Course Information Centre</p> <p>Discovery Days</p> <p>Community Learning Team visiting learning centres</p>

Appendix 2

Communications with Applicants	August	September	October	November	December	January	February	March	April	May	June	July
Information on Pre-entry activities												
Applicant Information												
Publications - Prospectus etc												
Course Information - subject specific												
Video/CD Rom												
Open Day Information												
Funding Information												
Magazine for Applicants												
Course Focus Magazine												
Passport student Pack												
Accommodation Leaflet												
Open Day - Invitation to Visit												
School Newsletter												
Accommodation Leaflet												
Disability Information												
Parents Guide												
Good Luck Cards (cross ref with CCU to avoid duplication)												
'Made your Decision Yet' card												
Guide for the Student's Union												
Orientation Programme Details												
International Handbook												
Summer College Information												
Enrolment Pack												
Welcome Week Information												
Student Handbook (issued on site)												
Invites to focus groups												
Cyber Café Course Finder Sessions												
Fee Assessment												