



# Widening Access to Postgraduate Study and Fair Access to the Professions

working together to ensure fair access to postgraduate taught education

SEPTEMBER 2015

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September 2015, The University of Sheffield.

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# Foreword

We are pleased to present the report  
*Widening Access to Postgraduate Study and Fair  
Access to the Professions.*

Our consortium of six, selective, research intensive, institutions in England was the largest of the HEFCE funded Postgraduate Support Scheme projects. We have some geographical coherence and as members of the Russell Group we share a similar mission. Participating in this pilot was of major significance to each of our institutions. We have large postgraduate taught (PGT) cohorts; and together represent 10% of the Home and EU PGT numbers outside of London. Importantly, we were committed to act together to widen access to PGT study and promote fair access to the professions. The increased national focus on postgraduate education is not only welcome, but very timely.

The actions and innovations described in this report helped us to learn more about the demand for PGT study, to understand potential students' motivations for study at this level and better understand the barriers faced by those wishing to progress their studies. The initiative has allowed us to test options for financial support, pilot academic innovations and trial interventions in the provision of information, advice and guidance including working with employers. As part of the project, we awarded 416 PGT scholarships to home and EU graduates with widening participation characteristics as defined by our criteria.

Our shared experience and the evidence as set out in this report will inform our different institutional approaches to our future provision of PGT study. The Government through the Department for Business, Innovation and Skills has been consulting on proposals for the future funding for postgraduate study and this report is timely in providing findings and recommendations which can inform the Government and HEFCE on how to ensure the future vitality of PGT education from 2015/16.

We would like to thank those colleagues from across our six institutions involved in this project for their effort in bringing it to a successful conclusion. We would also like to thank our benefactors, alumni and research bodies who have contributed to this project through the giving of their time, expertise and insight and through funding the project. Lastly and most importantly we extend our thanks to the scholarship award holders, some of whom are profiled in this report, for their valuable participation in this project.



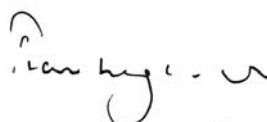
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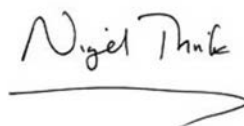
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# Acknowledgements

Widening Access to Postgraduate Study and Fair Access to the Professions was ambitious in design and involved teams across six universities in its realisation.

The steering group would like to thank the Higher Education Funding Council for England (HEFCE) for making this project possible, and in particular to thank Chris Millward and Dr. Brooke Storer-Church for their support and advice throughout.

As a consortium of six universities we are indebted to the contributions made by our colleagues from each partner institution who worked across institutional boundaries in a common endeavour to widen access to postgraduate study and the professions. Also, we would like to thank those who participated in a dissemination conference and who contributed to the project.

Special thanks are owed to the project managers: Jackie Toyne (Consortium), Helen Sykes (Leeds), Jane Hardman (Manchester), Clare McKeague (Newcastle), Betty Anyika (Sheffield), Cherryl Jones (Warwick), and Duncan Lean (York); as well as our Steering Group Members: Louise Banahene (Leeds), Helen Barton (Manchester), Anne Coxhead (Newcastle), Helen Dingle and Professor Jackie Labbe (Sheffield), Professor Christina Hughes (Warwick), Dr. Paul Wakeling and David Muckersie (York).

The outcomes described in this report would not have been possible without the valuable contribution of Dr. Paul Wakeling and Dr. Sally Hancock from the Department of Education at the University of York, Professor Gillian Hampden-Thompson from the School of Education and Social Work at the University of Sussex, Ritva Ellison and Kate Purcell of Warwick Institute for Employment Research, Rachel Moreton at CFE, Dr. Robin Mellors- Bourne at CRAC (the Careers Research & Advisory Centre), Soo Vinnicombe at the University of Sheffield, University Benefactors and Employers. Your generous support is greatly appreciated- thank you.

We would like to extend our thanks to the students and alumni who participated in the various research activities of the project. And finally our thanks go to the scholarship holders who were willing to work with us and share their experiences. Their presence gave this project its purpose and acted as a constant reminder of how and why the sector should work to liberate the talents of able people whatever their background and circumstances.

**DR. TONY STRIKE**

*Chair of the Consortium Steering Group*

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# Executive Summary

This report provides the analysis, findings and recommendations of the HEFCE funded Postgraduate Support Scheme (PSS) 2014/15 '*Widening Access to Postgraduate Study and Fair Access to the Professions*' project delivered by a Sheffield – led consortium comprised of six selective, research intensive, English Russell Group institutions (Leeds, Manchester, Newcastle, Sheffield, Warwick and York).

Our project was organised around four key themes:

**Financial** – Concerned with the development, pilot and evaluation of new models of financing PGT study with a view to creating a sustainable and equitable future for postgraduate study;

**Academic Innovation** – Concerned with the development and implementation of new academic products in order to encourage access, fairness, social mobility and the sustainability of PGT provision;

**Information, Advice & Guidance** – To develop and implement targeted interventions to provide information, advice and guidance to students to help attract and retain quality candidates;

**Understanding the Student** - To provide a detailed picture of postgraduate taught applications and enrolment at institutional level and develop an understanding of motivations and barriers to PGT study for students. In addition, to model the WP characteristics of postgraduate taught students and how these compared with undergraduate WP characteristics.

The project commenced in January 2014 and concluded in August 2015. This report was compiled at the end of the HEFCE funding period.

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## Key Findings

### POSTGRADUATE TAUGHT SCHOLARSHIP SCHEMES

- Universities could develop the criteria, launch and operate a postgraduate taught scholarship scheme in a timely way.
- Universities were prepared to match fund and seek additional benefactor funding against a state contribution to deliver postgraduate taught scholarships.
- Widening participation criteria for postgraduate study were possible to develop and could be operated successfully to target and select students for awards.
- There was unmet demand from eligible applicants for an appropriately promoted postgraduate scholarship scheme using widening participation criteria.
- The availability of scholarships had a significant influence on applicants' ability to participate in higher education at postgraduate level.
- Those students who returned to postgraduate study rather than progressed directly from undergraduate studies were more likely to have widening participation characteristics which had prevented their earlier progression to PGT.
- Single, simple and clear scholarship schemes were easier to promote, attracted more applications and less ineligible applications, and achieved higher acceptance rates than more complex or fragmented offers.
- The PSS scholarship holders were keen to be visible amongst the postgraduate population and welcomed opportunities to identify themselves as a group. Our scholars have been keen to tell their stories to us and to each other, and to participate in institutional activities which promote postgraduate widening participation as an issue of concern.

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## PROFESSIONAL CAREER DEVELOPMENT LOAN SCHEME

- Our project supported the proposal that there should be some form of government-backed loan scheme support for taught postgraduates. It was felt that the Government's proposal would act to increase and to some extent widen participation in postgraduate study. However, we found considerable opposition to the proposed age restriction to the loan offer raised by not only colleagues across the partner institutions but in our research and also amongst the current postgraduate scholarship holders.
- Our project has shown that the introduction of a loan scheme will not in itself be sufficient to support widening participation at postgraduate level. Our project has found that graduates from disadvantaged backgrounds are more concerned about extending their student debt burden than those from more affluent backgrounds.

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## MATCHED FUNDING

- It was possible to raise new funding specifically to support Master's study through philanthropic giving. Activities to gather small gifts from alumni were relatively low cost and simple to implement, with encouraging returns. Gifts from major donors took more lead time and more effort, but again, the project has shown that funding for postgraduate taught study can successfully be raised through this route.
- The engagement of institutional Development Offices was key. Development Offices may have concerns around philanthropic fund-raising specifically for Master's level study, and a small-scale pilot may be necessary to prove the concept. However, engagement will be strongly influenced by the position of postgraduate study in institutional philanthropic priorities.
- A greater understanding of the value of a Master's for access to particular professions was needed to be able to articulate the case for raising funding through employers.

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## ACADEMIC INNOVATION

- The pilot programmes demonstrated that there was latent demand for postgraduate programmes from non-traditional postgraduate student groups and that where the programmes on offer were flexible and designed to meet their learning needs these students were able to make a successful transition to PGT courses of study.
- The research conducted into integrated Master's programmes showed us how important it is for all potential postgraduate students to have access to comprehensive information advice and guidance around the benefits of Master's level study.
- Several elements were necessary for true academic innovation to emerge: sufficient and dedicated funding, a shared vision at the theoretical level even if practical developments differ, academic buy-in and dedicated time by the right academic leaders, and an agreed approach to quality assurance and scrutiny.
- A Toolkit for PGT programme innovation was developed to support innovation that suits the needs and structures of individual universities.

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## INFORMATION, ADVICE & GUIDANCE AND EMPLOYER ENGAGEMENT

- Our project has shown that WP approaches and interventions widely employed in undergraduate WP outreach programmes can be usefully developed to support PGT access.
- Staff often expressed concern about patronising potential PGT students, but students themselves felt that the availability of IAG was scarce and there was an assumption that having achieved an undergraduate degree meant they would automatically understand what was expected of them at PGT study, when in fact this was not the case.
- Clear institutional signposting is required to sources of information, advice and guidance intended for and appropriate to PGT students.
- As a sector we need to further understand that PGT students are not and do not present as a homogenous group. Part-time students, those with caring responsibilities and students who study a Master's straight from UG will all have very different experiences and require different opportunities to enhance their skills, ability and knowledge.

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## UNDERSTANDING THE STUDENT

- We saw a broad similarity of outcome across consortium institutions, noting that inter-institutional differences are most likely to be between different kinds of university.
- Getting into a research-intensive, selective university as an undergraduate may be more important than other factors in subsequently getting on to a postgraduate programme since some of the patterns observed did not differ markedly for those from different backgrounds.
- We found that the consortium institutions' postgraduate student body comprised relatively few graduates of post-1992 universities.
- Academic attainment was a very strong predictor of postgraduate access. That said, our project showed social class, gender and ethnic differences in offer rates and in overall rates of transition to taught postgraduate Master's programmes across the different sources of data.
- Inequalities in access do not seem to be due to differential aspiration, because those from minority ethnic groups and disadvantaged socio-economic groups were most likely to intend to enrol on a taught postgraduate Master's degree, but least likely to realise that intention.
- Qualitative evidence suggested that undergraduates' intentions for Master's study articulated early in their course were quite vague, most admitted to only seriously considering further study after graduation.
- Obtaining suitable employment was the principal motivation for undertaking PGT study, but intrinsic interest also featured. There were a number of findings pointing to graduates using the taught postgraduate Master's as a form of 'repair' for wrong choices and dead ends at an earlier stage, pointing to a need for improved information, advice and guidance both prior to and during undergraduate study.
- Looking at finance and funding, cost not debt featured most prominently. There were some indications that very high debts proved a barrier for disadvantaged groups. We found that there is a need for continued scholarship support, along the lines of the PSS awards offered in this and other projects, in order that those with high academic ability who lack their own or familial financial resources can be supported through Master's study.
- There are benefits in the graduate labour market for Master's graduates, although they are not – at least not yet – principally about salary. For nearly all Master's graduates, the type of work they secure seems to be relatively highly skilled.
- Inequalities of ethnicity, social class and gender appear in postgraduate transitions. There remains a possibility that there is unfairness in the postgraduate admissions process but we lack the data to determine this. We should also note the considerable heterogeneity and complexity seen in our findings. Working with the PSS scholars and reviewing the detailed qualitative evidence from the Careers Research and Advisory Centre (CRAC) reminds us to be alive to difficult individual circumstances which could otherwise get 'lost in the cracks' of broader conclusions.

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# Glossary

Admissions Study	Applicant and Registration Data
BIS	Department for Business, Innovation and Skills
BSc	Bachelor of Science
CLL	Centre for Lifelong Learning, The University of Warwick
DLHE	The Destinations of Leavers from Higher Education Survey
DSA	Disabled Students' Allowances
HE	Higher Education
HEA	Higher Education Academy
HEFCE	Higher Education Funding Council for England
HEIDI	Higher Education Information Databases for Institutions
HESA	Higher Education Statistics Agency
IAG	Information, Advice & Guidance
IM	Integrated Master's
IMD	Indices of Multiple Deprivation
JISC	Joint Information Systems Committee
OFFA	Office for Fair Access
PAS	Postgraduate Advantage Scheme
PbG	The Pathways Beyond Graduation Survey
PhD	Doctor of Philosophy
PtPG	The Pathways to Postgraduate Study Survey
POLAR	Participation of local areas classification that groups together the UK based on the proportion of the young population that participates in higher education
PG	Postgraduate
PGR	Postgraduate research programmes such as PhDs that involve independent study and the development of research and analysis skills
PGT	Postgraduate taught courses such as MA, MSc that are usually aimed at extending knowledge in one area
PSS	Postgraduate Support Scheme
QAA	Quality Assurance Agency for Higher Education
RCUK	Research Councils UK
RG	Russell Group Universities
SME	Small and Medium-sized Enterprises
STEM	Science, Technology, Engineering and Maths
UG	Undergraduate
WBS	Warwick Business School
WMG	Warwick Manufacturing Group
WP	Widening Participation (in higher education)

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# Chapter 1 Introduction and Background

DR. TONY STRIKE *University of Sheffield*

& JACKIE TOYNE *University of Sheffield*

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## 1.1 INTRODUCTION

This report provides the analysis, findings and recommendations of the HEFCE funded Postgraduate Support Scheme (PSS) 2014-15 project '*Widening Access to Postgraduate Study and Fair Access to the Professions*'. A pilot delivered by a Sheffield – led consortium comprised of six selective, research intensive, English Russell Group institutions (Leeds, Manchester, Newcastle, Sheffield, Warwick and York).

The project commenced January 2014 and concluded in August 2015. This report was written at the end of the HEFCE funding period, and provides our findings and recommendations. In addition, it offers an examination of the characteristics of the postgraduate students who benefitted from the scholarship programmes delivered by the partner institutions, and provides findings drawn from the different strands of the project.

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## 1.2 CONTEXT

In 2010, the Browne report '*Securing a sustainable future for higher education: an independent review of higher education funding and student finance*' made recommendations to government on the future of fees policy and financial support for full and part-time undergraduate students, which led to the most significant changes in funding policy for universities within a generation. Following its recommendations the Government made changes including lifting the cap on Home and EU undergraduate fees (then at £3,290 per year), implementing a new higher fee cap of £9,000 per year as well as the introduction of a government-backed loan scheme for undergraduate fees, offered to all students and to be repaid only when graduates were earning over £21,000 per annum. The review dedicated only one page to postgraduate funding and included the recommendation that postgraduate students should not receive the same funding support as undergraduates citing their reason:

*"we have seen no evidence that the absence of student support in the taught postgraduate market has had a detrimental impact on access to postgraduate education."* (Browne, 2010, p.55).

However, the review group recognised that their funding recommendations would transform the HE landscape and Browne recommended that:

*"In the future if students are paying higher fees to enter undergraduate education, they will be less likely to participate in postgraduate study. Trends in postgraduate study should therefore be monitored carefully, including after the introduction of any changes to funding and student finance."* (Browne, 2010, p.55).

At the time of the review, the news media focused on the undergraduate population and it stressed the impact these changes would have on restricting social mobility by discouraging entry to undergraduate study. The one page of Browne's review dedicated to postgraduate funding was seemingly overlooked and commanded much less public attention.

Parallel to the Browne review, an independent review group for government was asked to consider the value of and challenges to postgraduate education. The Department for Business Innovation and Skills (BIS) published the findings of their review of postgraduate education led by Professor Adrian Smith in the report '*One Step Beyond: Making the most of postgraduate education*'. The review group made clear that the spotlight needed to be turned to postgraduate education and expressed their concern that:

*"Until recently, the issue of whether there is fair access to postgraduate study had been relatively neglected- certainly in comparison to the policy measures taken to combat inequality of opportunity at undergraduate level."* (Smith, 2010, p.45).

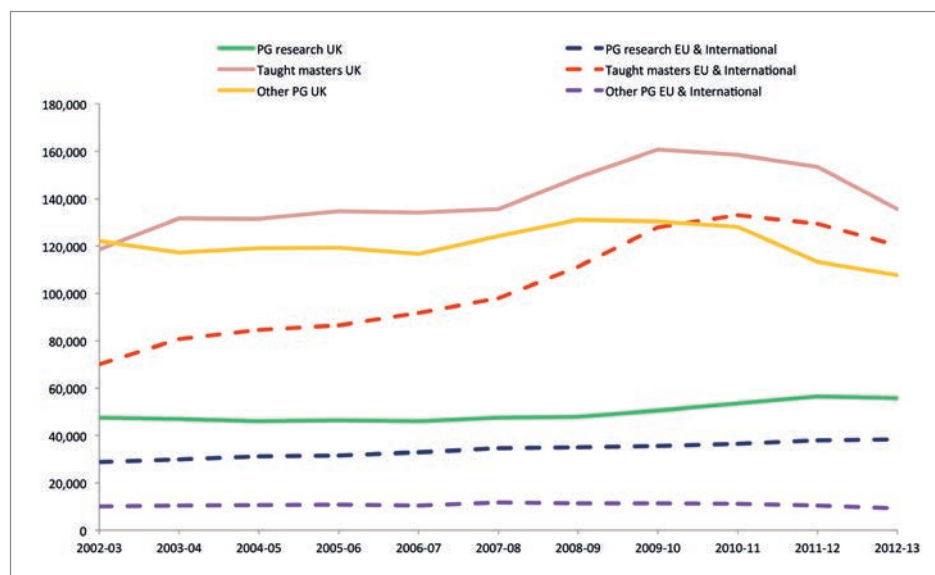
Smith's review strengthened the profile of postgraduate education within public debate and demonstrated that postgraduate study was of major national importance, valuable for social mobility, economic growth and supporting the growth and dissemination of specialist knowledge. They made explicit the value of postgraduate study to the UK's economic growth and international competitiveness. A recommendation of Smith's review was that equity of access to postgraduate study and the impact of financial and other barriers required further investigation.

Following this review, a nascent campaign began to call for fair access to postgraduate study. Increasingly commentators on widening participation identified and reported upon examples of inequality within the postgraduate population. For instance, the report *'The social composition and future earnings of postgraduates'* commissioned by the Sutton Trust (2010) found that 30% of university students educated at private schools were in postgraduate education six months after graduating, compared to only 23% of state educated pupils. Similarly *'Transition to higher degrees across the UK: An analysis of national, international and individual differences,'* (Wakeling & Hampden-Thompson, 2013) reported that survey analysis found inequalities in transition to postgraduate study by gender, social class, and ethnicity. More recently HEFCE's report published in 2015 *'Delivering opportunities for students and maximising their success:*

*Evidence for policy and practice 2015-2020'* (HEFCE, 2015) shows that there are worse outcomes- in terms of degree attainment and progression to postgraduate study and/ or graduate employment- for students from disadvantaged backgrounds (as measured by POLAR3), students from ethnic minority groups and disabled students not in receipt of Disabled Students Allowance (DSA).

The issue of fair access was being highlighted at a time when there was increasing concern across the sector about the diminishing numbers of UK/EU students registering for postgraduate study. *'Exploring Student Demand for Postgraduate Study'* showed us that the recent growth in postgraduates registering in the UK had been driven by large numbers of students from outside the EU (Department for Business, Innovation and Skills [BIS], 2013).

FIGURE 1.1:  
Number of UK/EU  
applications for PGT study  
(Source: BIS 2013)



As shown in Figure 1.1 recent past trends were not very encouraging and revealed that the number of UK/EU applications for PGT study had risen year on year until 2009/2010 and then applications had fallen in both 2010/2011 and 2011/2012. The number of applications submitted by UK domiciled applicants showed a substantial decrease of 15% over two years (BIS, 2013). There was widespread concern that if left unchecked this reduction would continue and would inevitably be exacerbated as the first cohort of undergraduates who had been charged the new higher fees graduated in summer 2015. It was expected that UK domiciled graduates from lower socio-economic backgrounds who faced increased levels of undergraduate loan debt would feel less able to progress to postgraduate study and face further debt and upfront costs. In his report *'Higher Education: The Fair Access Challenge'*, Milburn the government's adviser on social mobility warned that:

*"There is a real risk that an individual's ability to pay up front, rather than their potential, will become an increasingly determining factor in who can access postgraduate education ... Moreover, as tuition fees rise, those from disadvantaged*

*backgrounds may be less likely to want to take on additional debt after graduating."* (Milburn, 2013, p.72).

The benefits of postgraduate study for the UK economy and society, as well as individuals and employers were increasingly evident. Simply measured in economic terms, evidence showed that postgraduates enjoyed higher earning outcomes than those with a first degree only (Department for Business, Innovation and Skills [BIS], 2010). The lifetime wage premium had been estimated at £200,000 for a postgraduate degree (Milburn, 2012). In addition, according to research provided by London Economics to BIS the net benefit of a Master's degree in tax revenues to the Treasury was around £67,000 for men and £44,000 for women (Conlon & Patrignani, 2011).

Further, postgraduate qualifications were increasingly becoming a standard requirement for entry into professions such as journalism, accountancy and academia. In the first major review undertaken by the Higher Education Commission since the Browne report and the subsequent rise in undergraduate tuition fees, Milburn warned:

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*“Postgraduate education is in danger of becoming “the new frontier of widening participation”- with prospective students currently barred from study if they cannot afford fees or access sufficient credit. There are a number of fields and professions where postgraduate qualifications are becoming a de facto requirement for employment. If action is not taken we could see the gains made from widening participation at undergraduate level diminished.”*

(Higher Education Commission, 2012, p. 53).

Up until this point, policy initiatives aimed at achieving widening participation within HE had focused upon undergraduate level and impressive gains had been made in this regard. However it was becoming increasingly clear that inequality cannot be viewed as an issue which affects access to undergraduate study only. Commentators such as Stuart (2012) reminded us that social mobility can be both upwards

and downwards and those who were the first generation in their families to access HE undergraduate study were more vulnerable and at greater risk of downward mobility.

Consequently attention turned to how Government policy could be developed to support progression and halt this disparity between access to undergraduate and postgraduate study. Equitable access to postgraduate study and the related issues of equity, social justice and social mobility had become politically prominent. However, little was known as to what motivates people to further study, what barriers existed which hindered progression, what advice and guidance worked to support progression, why some institutions were more successful than others in recruiting, what the implications were for course design and delivery to support study at this level, and what widening participation indicators were relevant for postgraduates (Strike, 2015).

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### 1.3 HEFCE SUPPORT

As a response to the concerns and issues raised, HEFCE announced in December 2013 the launch of a Postgraduate Support Scheme, a £25 million publicly funded competitive programme to stimulate initiatives promoting postgraduate taught education. The funding was available for pilot projects that would test options for finance and for activity aimed at stimulating progression into postgraduate taught education, particularly among currently under-represented groups and in areas that supported the Government's ambitions for economic growth.

HEFCE's scheme had two key aims, to ensure that taught postgraduate education:

- was accessible to the most capable students regardless of their background, thereby maximising its contribution to social mobility and the diversity of the professions, including the higher education profession,
- continued to be successful and sustainable at the heart of higher education teaching, research and knowledge exchange, thereby supplying the highest level of skills and knowledge to industry, the professions and public services, and attracting students from around the world. (HEFCE CL18/2013, p.2).

The findings of the pilots were intended to inform:

- Institutional practice,
- Government Policy and Funding,
- Future research.

There were twenty pilot projects funded under the HEFCE PSS scheme and across the portfolio the projects each focused on one or more of the following themes:

- Finance,
- Pastoral Support,
- Employability.

A synopsis of the project summaries for the twenty pilots can be found at: [www.hefce.ac.uk/sas/PSS/](http://www.hefce.ac.uk/sas/PSS/)

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### 1.4 CHAPTER SUMMARY

This chapter has provided the policy background and context to our project. The subsequent chapters explain the approach employed to deliver the pilot PSS project and also our findings. We are confident that our pilot has significantly contributed to our participating institutions' understanding of innovation in the provision of postgraduate taught study.

Through this report we hope to further inform the sector's understanding of the multi-dimensional factors that hinder progression to postgraduate taught study and in particular for those among currently under-represented groups which will better inform institutional practice, Government policy and funding, as well as future research.

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# Chapter 2 Our Approach

DR. TONY STRIKE *University of Sheffield*

& JACKIE TOYNE *University of Sheffield*

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## 2.1 INTRODUCTION

In this chapter the project scope, deliverables and the framework developed to manage the project '*Widening Access to Postgraduate Study and Fair Access to the Professions*' are described.

Prior to HEFCE's call for proposals, the University of Sheffield was already concerned with reviewing many aspects of its postgraduate taught offer. The funding call provided the catalyst to develop this further.

Any proposal for a pilot project aimed at stimulating progression into postgraduate taught education (PGT),

particularly among currently under-represented groups, required a multi-dimensional response to unravel the concerns and issues identified within chapter 1 of this report. In the initial institutional discussion which took place, it was felt that a project proposal should be developed with other Russell Group (RG) partners to establish a project of scale across different sites which would broaden the experiences and expertise available and provide a holistic approach to address the multiple factors that may hinder the progression of students and prevent innovation by institutions.

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## 2.2 ESTABLISHING THE CONSORTIUM

Dr. Tony Strike, Director of Strategy, Planning and Change at the University of Sheffield invited partners interested in establishing a consortium bid to express their interest in submitting a proposal to HEFCE under the Postgraduate Support Scheme (PSS)2014/15 call.

Five institutions responded positively and volunteered to be a partner to an application with the University of Sheffield- namely Leeds, Manchester, Newcastle, Warwick and York- and the consortium was formed. The project proposal submitted to HEFCE was a collaboration of all the partners.

The six participating institutions have distinct missions, visions and strategies. There are, however, common

institutional, regional, and economic interests and challenges which meant the success of this project was central to all our institutional strategies and as such all were willing to work across institutional boundaries. Each institution was committed to fairness and equity of access to education based on merit; regardless of background, characteristics or ability to self-fund, and to sustaining and growing PGT student numbers. The group had some geographical coherence, large PGT cohorts, together representing 10% of Home PGT numbers outside of London (see Table 2.1), belonged to the same mission group and were prepared to act in a common cause on widening access to PGT programmes while valuing academic excellence.

TABLE 2.1:  
New full-time PGT  
registrations in 2012/13  
(Source: HESA 2012/13)

Institution	Home/EU	Overseas	Proportion Overseas
Newcastle	836	1,703	67%
Sheffield	1,183	2,079	64%
Warwick	1,148	1,835	62%
Manchester	1,635	2,561	61%
Leeds	975	1,486	60%
York	861	1,051	55%
Other Russell Group	22,257	24,127	52%
Other sector	60,750	52,602	46%
All	89,645	87,444	49%



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The Sheffield-led consortium of six selective research intensive English Russell Group institutions was the largest project in terms of the scale of the pilot projects funded by the HEFCE PSS 2014/15. The total project budget was £5.3 million of which £2.9 million came from HEFCE with the remainder deriving from institutional matched funding. Some 73% of the total budget was routed through the partner institutions to students in the form of scholarships.

Managing a collaboration between higher education providers was challenging in a system which is often seen as marketised. Student-orientated market norms meant working with care, to avoid any anti-competitive behaviour that might lead to accusations of collusion. However,

for us collaboration which harnessed the strength of the consortium to address common societal challenges remained a strong imperative. Information sharing between partners throughout the establishment, delivery and reporting of this project was subject to data sharing agreements to allow research to take place. We did not share PGT target, pricing or admissions information which was not readily available in the public domain.

This report contains institutionally anonymised data and survey responses. Each of the participating institutions has been supplied with their own results and the consortium averages but the results of the other five partners were presented anonymously.

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### 2.3 OUR PROJECT AIMS

The project was ambitious in design and focused on themes of: financial; academic innovation; information, advice and guidance; and understanding the student, as summarised in Figure 2.1 right.

Each strand had an agreed scope:

**Financial** - To develop, pilot and evaluate models of financing PGT study with a view to creating a sustainable and equitable future for postgraduate study;

**Academic Innovation** - To develop and implement new academic products in order to encourage access, fairness, social mobility and the sustainability of PGT provision;

**Information, Advice & Guidance** - To develop and implement targeted interventions to provide information, advice and guidance to students to help attract and retain quality candidates including working with employers of postgraduates;

**Understanding the Student** - To provide a detailed picture of postgraduate taught applications and enrolment at institutional level and develop an understanding of motivations and barriers to PGT study for students. In addition, to model the WP characteristics of postgraduate taught students and how these compared with undergraduate WP characteristics.

Each of the strands had a clear rationale for inclusion and was refined as the project developed. Existing evidence was evaluated and used to inform the activities of the particular project strand. The rationale will be explained within each of the subsequent chapters.

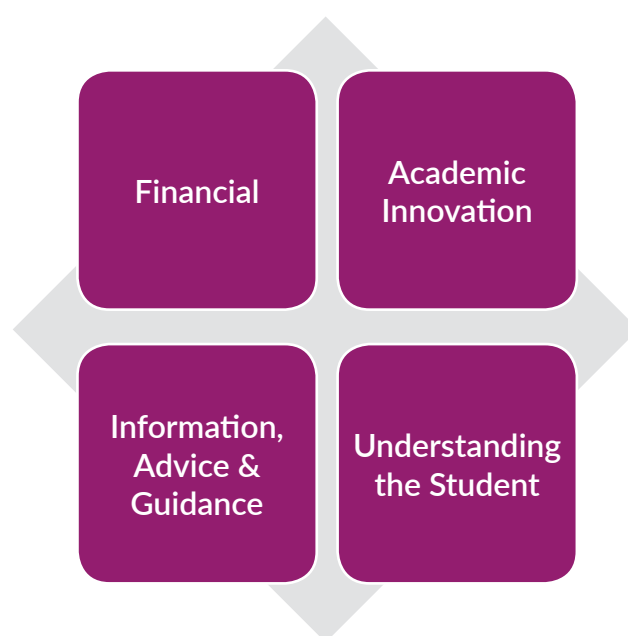


FIGURE 2.1: Overview of Four Project Strands

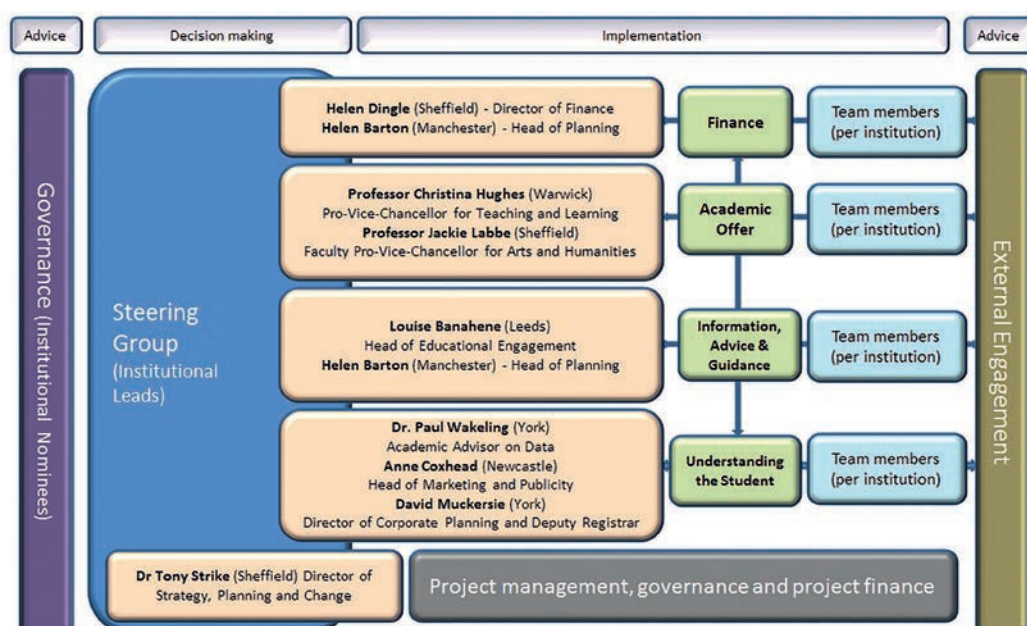


## 2.4 ROLES AND RESPONSIBILITIES OF THE CONSORTIUM PARTNERS

The University of Sheffield was awarded the HEFCE funds and had a collaboration agreement in place with the consortium partners. Each institution nominated a lead person for the project, the project strands were led by

one institution on behalf of the group and each institution committed to delivering the whole project scope. The roles and responsibilities structure adopted for the project is shown in Figure 2.2 below.

FIGURE 2.2:  
Roles and responsibilities  
of members



The Steering Group had oversight of the project across all six consortium partners and all four strands. Together the members of the steering group brought a wide range of perspectives and a wealth of experience to the project. They each offered specialist knowledge within the strands they led on. In addition, they represented the interests of and made project decisions representing their own institution.

In the initial stages of the project, the steering group met every month and after six months this was adjusted to a meeting every two months. In between meetings regular communication took place.

In addition to the institutional lead, each partner institution appointed a dedicated project manager funded by the project to support institutional delivery. Also, a consortium project manager was appointed to co-ordinate activity centrally across the six institutional project managers and to support the chair of the steering group.



FIGURE 2.3:  
Project Managers from L-R:  
Helen Sykes (Leeds);  
Cheryl Jones (Warwick);  
Duncan Lean (York);  
Jackie Toyne (Consortium Project Manager);  
Clare McKeague (Newcastle);  
Jane Hardman (Manchester);  
Betty Anyika (Sheffield).



## 2.7 DISSEMINATION

Institutional reports, updates and findings were presented throughout the project to each institution and to each strand lead.

Prior to the end of the project, a consortium dissemination conference was held in Sheffield to present, discuss and review findings. This conference was viewed as integral to returning value from the project to the consortium institutions and was open to institutional partners only. In total 83 delegates attended and included a broad range of colleagues from each institution. Attendees included Chris Millward from HEFCE, five PSS PGT Scholarship holders, Student Union representation from participating universities,

Pro Vice-Chancellors of Learning and Teaching, Deputy Vice-Chancellors, Senior Academics and other key staff involved in PGT delivery.

This closed event was an opportunity for the project team to share and discuss the significance of their findings. This final report is the primary means of wider dissemination to the sector and takes account the views expressed at the conference.

In addition a consortium website has been developed which contains our project research findings and case studies of scholarship holders. The website can be found at: [www.postgradsupport.co.uk](http://www.postgradsupport.co.uk)

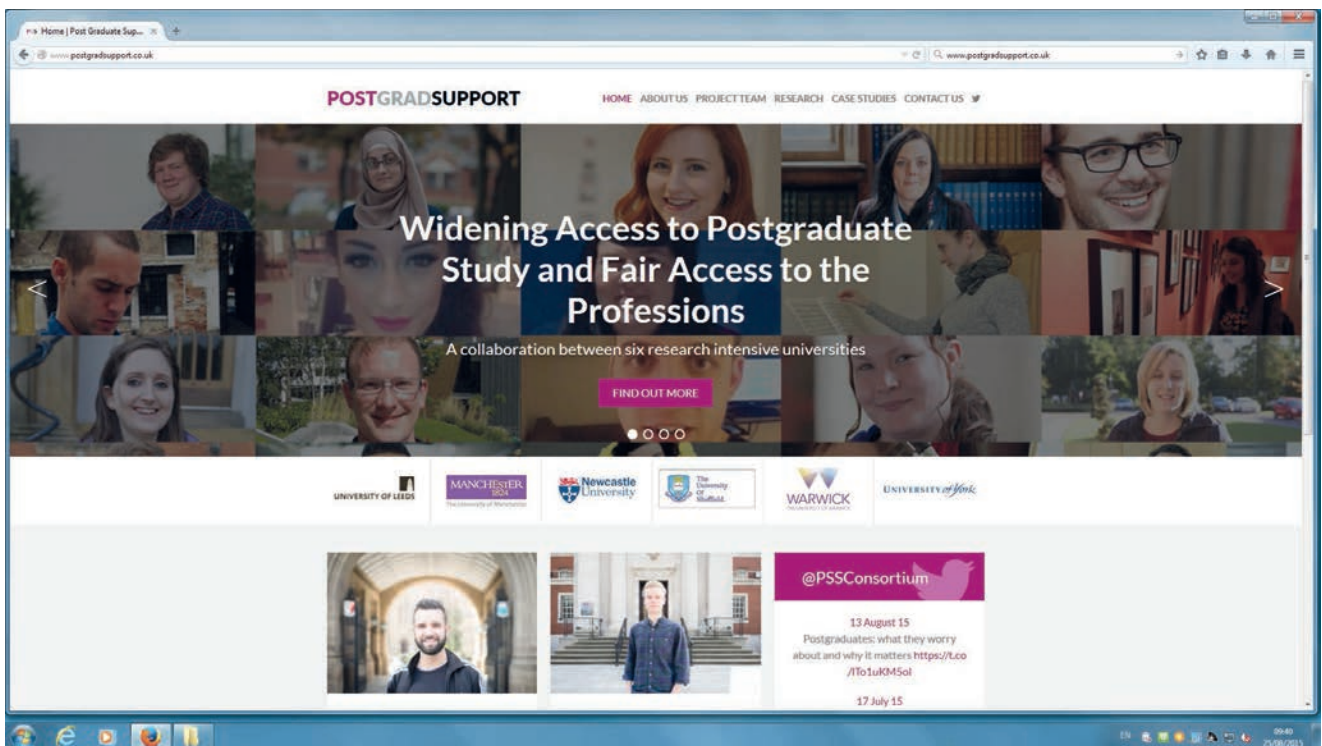


FIGURE 2.5: Project Website Homepage

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## 2.8 PROJECT EVALUATION

As shown in Figure 2.4 project evaluation was an ongoing feature of our project. At the outset we recruited an independent external organisation (CFE) to evaluate the delivery of the objectives across all partner universities.

Their evaluation involved two phases of activity.

Phase One took place at the beginning of the project and involved:

- The design of a qualitative and quantitative evaluation framework (including indicators) and methodology for the project targeting under-represented groups accessing postgraduate taught education (PGT).
- The production of a specification guide of MIS data collection requirements which would be necessary for completion of phase two of the evaluation.

Phase Two commenced in spring 2015 and ended July 2015 and entailed:

- Evaluation of the project against the framework and methodology proposed in phase one and the evaluation work plan.
- Production a final evaluation report to summarise impact and progress made during the project.

We were keen to include a robust evaluation process within our project plan to promote transparency and to ensure that a consistent approach was adopted at all partner sites. In addition, we felt that dissemination should include all learning generated by the project and an objective evaluation would assist us in this and would demonstrate whether or not we had met our project objectives and also show where and why the project differed to that which was originally planned. A summary of the evaluation is available at Chapter 9 of this report with a full report available at: [www.postgradsupport.co.uk](http://www.postgradsupport.co.uk)

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## 2.9 CHAPTER SUMMARY

This chapter has explained the framework developed to manage the project. It has described the key elements of the management structure. Each element of the project framework was not discrete and the selection of each element was seen to have implications upon another, and indeed the overall project. This chapter therefore provides

the context for the project and sets the stage for the following sections which contain the discussion, analysis, findings and recommendations generated by each of the project strands. The subsequent chapters have been written by the project strand leads that have steered the project activity in the particular area.

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# Chapter 3 Postgraduate Taught Scholarship Schemes

DR. TONY STRIKE *University of Sheffield*

& JACKIE TOYNE *University of Sheffield*

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## 3.1 INTRODUCTION

A central activity of our project concerned offering financial support to graduates and alumni from widening participation or under-represented groups to enable their progression into PGT study where this was their ambition. Within our project proposal, we stated that we would test options for finance and activity aimed at stimulating progression into PGT in two ways:

- 1) Develop, implement and evaluate a **Pilot Postgraduate Taught Scholarship Scheme** - offered at scale to test or prove demand and to improve take-up of taught postgraduate programmes, particularly among under-represented groups with recognised undergraduate widening participation (WP) backgrounds;

- 2) Investigate how the financial strength of the HE sector could be used to co-design, launch and pilot a **Professional Career Development Loan Scheme** which would be:

- a. Designed to increase the general level of available loan funding for PGT students;
- b. Targeted at widening participation groups.

A successful pilot we argued would provide the foundation for a national scheme.

In this chapter we will consider our approach to the first of these objectives, a Pilot Postgraduate Scholarship Scheme. In Chapter 4 we share our experience of co-designing a proposed Professional Career Development Loan Scheme with a commercial partner.

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## 3.2 BACKGROUND

As discussed in the opening chapter of this report, whilst evidence was readily available to demonstrate the recent reduction in United Kingdom and European Union (UK and EU) PGT numbers, the reasons for this decline had not been established. Whilst commentators agreed that the main reason for this reduction was financial, they also cited a variety of other factors including lack of demand, lack of opportunity, and lack of programmes prospective students wanted to study. As the first cohort of undergraduate students paying the higher fee levels were due to graduate in summer 2015 it was feared that this decline in numbers progressing to PGT study would accelerate particularly amongst those from lower socio-economic backgrounds. Over recent years, the sector has gradually addressed concerns over inclusion, access, success and retention at undergraduate level. However, there was a perceived risk that any gains made at undergraduate level would be cancelled out if inequality simply passed up to postgraduate level. Therefore the need to solve the issue of equitable progression to PGT was a priority.

The term widening participation (WP) refers to people from backgrounds under-represented at university. WP is one

of the strategic objectives of HEFCE and it is pursuing this policy through a number of measures including the PSS programme. Those targeted under such policy initiatives at undergraduate level include young people from low income backgrounds, those living in neighbourhoods with a low participation rate in higher education, those whose parents did not go to university, those from state schools, young people from a care background, those with a disability, or those returning to education as mature students. WP initiatives at undergraduate level seek to address disparities in the relative representation of these groups and increase the proportion from under-represented groups.

Whilst we are familiar with the concept of undergraduate WP, this narrative does not yet extend to postgraduate study. Commentators including Wakeling and Hampden-Thompson (2013) have reiterated the need to address the fundamental question of what is meant by underrepresentation, disadvantage and WP at PGT level. For our consortium, HEFCE's funding for the PSS project was viewed as pivotal in developing the dialogue and extending our understanding of this endangered group.



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### 3.3 DEVELOPMENT OF THE SCHOLARSHIP SCHEMES

Within our funding bid we specified that we would develop, implement and evaluate a Pilot Scholarship Scheme offered at scale to test or prove demand and to improve take-up of taught postgraduate programmes, particularly among under-represented groups from WP backgrounds.

In order to test for qualifying demand the six consortium institutions co-operated in offering 350 scholarships of typically between £10,000 and £15,000 based on WP criteria. These scholarships would be funded 50% by HEFCE and 50% matched by the institutions. The project evaluation report provides further analysis of each of the six schemes<sup>1</sup>.

The PSS project began in January 2014, for recruitment of students to commence their studies in autumn 2014. This tight timescale meant that we had to adopt a pragmatic approach to the design of the schemes. In the absence of any pre-existing nationally agreed WP criteria at postgraduate level, each of the partner institutions developed their own scheme criteria to include their WP indicators.

Due to the requirements of the HEFCE PSS funding, there were common shared eligibility criteria for the six partners' schemes:

- **Period of Study:** Applicants had to intend to study at one of the six institutions on a one-year full-time or two-year part-time taught postgraduate programme beginning September 2014 (due to the short term nature of the funding, scholarship awards were not open to applicants deferring entry);
- **PGT Course:** Applicants had to pursue PGT study leading to an MA, MBA, Med, MMus, MPH, MRES, MSc or LLM qualification. Applicants must if selected subsequently take up a place and remain on one of these eligible programmes. Scholarships were not available to those intending to study for a PGCE, postgraduate research degree or an integrated Master's degree, or those who already held a qualification at Master's or doctoral level, or those studying postgraduate courses that already attract financial support by an employer or other public body;
- **Domicile Status:** Applicants had to be a UK or EU student paying academic fees at the UK/EU rate.
- **Academic Achievement:** Applicants had to have an upper second class degree or above by July 2014. The schemes operated on the basis of this threshold plus the other criteria, not on the basis of academic ranking.
- **Widening Participation Measure:** Applicants had to satisfy at least one WP Criteria or be a member of a defined under-represented group for their chosen course of study.

It was the first four criteria (listed above) that permitted an application to be considered as eligible for further consideration against the widening participation criteria. If an application satisfied the first four criteria and at least one WP measure then it was counted as eligible for consideration for the funding.

Each of the partner institutions developed their own WP measures. Some institutions replicated existing concepts of WP as applied to undergraduates (e.g. first member of the family to go to university), others translated the undergraduate criteria to the new population (e.g. in receipt of state benefits in place of means tested bursary for an undergraduate) and some were experimental innovations (e.g. those who had been out of HE for more than two years of study). Encouragingly a common list of measures emerged although no institution used the entire list. Where institutions shared a common measure, the qualifying criteria they used differed. In the absence of national guidance no common view existed on the best way to measure WP characteristics at postgraduate level, and the differences may have appropriately reflected the priorities of each institution. Debate took place about the independence of postgraduate applicants from their parents and the extent to which any original disadvantage they may have experienced as an undergraduate had been removed on their graduation with a Bachelor's degree.

Table 3.1 opposite summarises the criteria measures selected by the six institutions.

Having selected its criteria, each institution then determined its own weighting scores to be applied. A common weighting applied by all six institutions was that applicants who evidenced a local authority care background were automatic qualifiers for the scholarship scheme. Scheme design also included necessary consideration being given to tie break situations. Institutions varied in this regard, some gave priority to students who could demonstrate that they satisfied more than one of the criteria, others prioritised students with the highest graded academic qualification; others introduced supporting textual statements into the application process which were presented anonymously to a panel for scoring.

<sup>1</sup> A copy of the evaluation report is available at: [www.postgradsupport.co.uk](http://www.postgradsupport.co.uk)

Criterion	Measures	Number of partners applying criteria
Financial Status	The institution considered the applicant's previous undergraduate status: the applicant had received a full fee waiver, OR had received a maintenance grant from the Student Loan Company OR had received a means tested bursary as an undergraduate; OR the institution considered the applicant's current financial status: for example, in receipt of means- tested benefits (E.g. Job Seekers Allowance, Housing Benefit, Council Tax Benefit, Universal Credit etc.)	6
Neighbourhood Data	Applicant's postcode on entry to undergraduate study was measured by: Index of Multiple Deprivation OR POLAR3 OR PARTNERS Formula which is specific to Newcastle University only and is a probability formula based on following postcode data: NSSEC 4-8, Employment deprivation and Child Well-being index.	5
School Achievement	School achievement data for the year in which the applicant sat their GCSE's or equivalent, compared with the national average- combined with Neighbourhood IMD data	1
Local Authority Care Background	Prior to undergraduate study, the applicant had been in local authority care for at least 13 weeks.	6
Disability	Applicant was in receipt of Disabled Students' Allowance (DSA) as an undergraduate AND/OR in receipt of Disability Living Allowance (DLA) OR Personal Independence Payment (PIP).	5
Carer	Applicant had to be a Carer for an ill or disabled family member, OR a single parent with pre-school or school age children.	3
First Generation	First in immediate family (excluding siblings) to go to University.	3
Under-representation	In an under-represented group for their chosen course of study: For example women into engineering; women into business.	3

TABLE 3.1: Widening Participation Scholarship Scheme Criteria

### 3.4 ADMINISTERING THE PSS SCHEME AT INSTITUTIONAL LEVEL

In determining the scholarship schemes, institutions needed to consider how they would administer their scheme, which was seen to have an impact upon the award of scholarships. Institutions which operated a central fund that incorporated both the HEFCE funding and the institutional match made awards on the basis of those whose applications scored the highest. However, where a central fund was not administered and each faculty or department or programme had a number of scholarships on offer, the schemes became more complex both to advertise and to administer the selection process. Where the match funding was provided by specific faculties or departments, those applicants who scored the highest for those faculties or schools were offered the scholarship awards- irrespective of whether they scored the highest for WP out of the overall pool of applicants. We found that those partner institutions which operated a single scheme with a centralised fund attracted higher

We found that those partner institutions which operated a single scheme with a centralised fund attracted higher numbers of applications, had fewer ineligible applications and could make scholarship offers solely based on a single rank of their selected criteria.

numbers of applications, had fewer ineligible applications and could make scholarship offers solely based on a single rank of their selected criteria. The institutions which did not administer a central fund and whose schemes were more devolved or more complex in design, did experience greater administrative problems as described, but their approach did enable them to spread the awards and target particular programmes of study.

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### 3.5 MATCH FUNDING THE SCHOLARSHIPS

As part of our project overall budget, each institution was required to provide at least a 100% match for the HEFCE funding. In the main, the match came from institutional central funds or from particular faculties/departments as described above.

However some of the partners did approach benefactors to match fund and this proved to be successful. The funds raised through philanthropy were substantial but remained a small proportion of the overall match funding required.

We explain our experiences of raising benefactor and donor match funding more fully in chapter 5 of this report.

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### 3.6 PROMOTING THE SCHEMES

The timescale of the PSS project was challenging for all the consortium partner institutions. Designing and obtaining institutional approval for the scholarship schemes and identifying institutional match funding was the first hurdle. The second was ensuring the scholarship offer could be advertised so that we attracted eligible applicants.

Consequently each consortium partner developed their own communication and marketing plan to promote their scheme which included:

- All plans involved extensive internal promotional activity such as placing advertisements on institutional websites and intranets, further references included on admissions and academic department websites, as well as staff websites, careers services websites, and students' union websites. Final year students were sent personal e-mails. Social media including Blogs, Facebook pages and Twitter messages were also employed.
- All partners promoted the scholarship offer to all PGT offer holders commencing study 2014/15; and also to any PGT enquirers.
- Alumni from each partner institution were notified of the scholarship offer.
- Further promotion took place via the distribution of flyers, bookmarks etc. at internal and external events such as PGT open days.

In addition to the institutional marketing plans, the consortium undertook some shared promotion. We developed a consortium home page with links to the six partners' schemes and application processes. Figure 3.1 below shows a copy of the page. This home page was used in several ways throughout the project. For example, it was used in our 'Understanding the Student' project strand (see Chapter 8), which distributed two research surveys during spring/summer 2014 by personal email to alumni of and current students at all six participant universities. On completing the survey the respondents were taken to the home page which thanked them for their participation and also promoted the availability of PGT scholarships for autumn 2014 entry.



FIGURE 3.1: Copy of project home page used to support the Understanding the Student project strand.

In addition, the home page was further used by the consortium partners as part of a shared promotion placed with Prospects. In May 2014, 92,500 Home and EU PGT enquirers registered with Prospects were emailed to notify them of the scholarship offers and they were directed to the promotional home page for further information.

Our evaluation has shown that amongst the survey respondents most found out about the availability of scholarships through the university websites (67.5%) and the second most common way was through the academic departments (23.1%) (Moreton, 2015, p.15).



### 3.7 TAKE-UP OF THE SCHEMES

In the context of falling numbers of UK and EU applications and registrations to PGT study and uncertainty over the strict eligibility rules applied by the consortium partners, there was some apprehension across the consortium members as to whether or not qualifying demand would materialise. Individuals with aspiration who met the WP criteria may not have existed and the places may have gone unfulfilled.

In addition, we were conscious that the time available for designing schemes, promoting them and awarding scholarships to successful applicants was extremely tight. Further, the timing of this activity did not map into the typical academic year cycle and was a relatively late offer.

In the event, the response was overwhelming.

Despite the strict eligibility criteria and WP criteria described above, the consortium received five times the number of complete and eligible applications than it had scholarships to offer as shown in Table 3.2 below.

Institution	Number of Eligible Applications
A	360
B	302
C	237
D	309
E	171
F	346
<b>Total</b>	<b>1725</b>

**TABLE 3.2: Number of eligible scholarship applications (Institutions are represented with letters A-F)**

Despite the strict eligibility criteria and WP criteria described above, the consortium received five times the number of complete and eligible applications than it had scholarships to offer.

Collectively our consortium achieved the highest number of eligible applications out of the twenty projects funded by the HEFCE PSS programme. In the face of this demand, the consortium partners made additional funding available (this time without additional HEFCE matched funds) so that the number of scholarship awards increased from the 350 originally planned to 416 actually awarded. This is the largest single postgraduate taught scholarship offer the country had seen and also by far the highest offer by any of the HEFCE PSS funded projects.

Across the consortium, 31 of those initially offered a scholarship turned the offer down citing a variety of reasons including that at the time of the offer their personal circumstances prevented them from pursuing PGT, some had received a job offer, and a small number felt that the

scholarship offer was not of sufficient monetary value to cover all their costs (fees and living costs).

Overall, we found that those institutions which offered a straightforward scheme where applicants were made aware of the exact detail of the scholarship offer at the time of application attracted fewer decliners. When a scholarship offer was declined the next eligible applicant on the reserve list was made an offer. The number of scholarship holders was maintained at 416.

A small number of applicants reported that their scholarship award would impact upon their means-tested state benefit entitlement. One successful applicant who satisfied the most WP criteria was forced to decline the scholarship offer as it reduced the amount of benefit entitlement her household would receive. The applicant reported that the £10k scholarship offer would be treated as household income and as such her benefit entitlement would have been reduced accordingly. As a single parent with young children, undertaking the Master's course would have entailed additional expenditure such as increased childcare and travel costs. Consequently the applicant reported that she would have been considerably worse off financially and as a result felt compelled to decline the offer. A further successful applicant at another partner institution was forced to interrupt her studies for the same reason. The scope of the pilot project prevented us from fully unravelling the issues associated with scholarship awards and the impacts on state benefit entitlement, however further exploration of this should be factored into future potential scholarship and loan schemes aimed at WP groups.

Table 3.3 below shows the total number of scholarship applicants for each partner's scheme and then breaks the figures down to show how many of the applications were eligible for the scheme and also how many were ineligible.

Institution	Total number of applications	Total number of eligible applications	Total number of ineligible
A	414	360	54
B	425	302	123
C	251	237	14
D	671	309	362
E	224	171	53
F	361	346	15
<b>Total</b>	<b>2,346</b>	<b>1,725</b>	<b>621</b>

**TABLE 3.3: Eligible and ineligible scholarship applications received by each University.**

Analysis of the ineligible applications reveals the main reasons for ineligibility as:

- Not holding a valid course offer;
- Non-EU overseas applicants;
- Failure to satisfy at least one WP criteria- including not submitting relevant evidence;
- Applied for ineligible courses.

Institution D had the most ineligible applications at 49.6%. This institution's scheme was the most complicated in design, offered scholarships of differing amounts and also

had match from faculties as opposed to a central fund which dispersed its scholarship offer. It was felt that these factors acted to confuse applicants and as such they were unable to determine their eligibility which meant they unnecessarily submitted applications. In comparison Institutions C and D achieved recruitment successes with only a small proportion of ineligible applications (both less than 5%). These institutions delivered a straightforward scholarship scheme with a single offer of £10k and operated a central scheme, criteria and fund. Across the consortium, the straightforward schemes and simpler recruitment approaches were seen to be more effective both for the applicant and the institution.

### 3.8 THE SCHOLARSHIP HOLDERS

Due to the level of demand, most of the successful applicants had typically to qualify under multiple headings, and satisfying a single criterion (unless an automatic qualifier) would not have sufficiently differentiated between applicants.

Table 3.4 shows the number of WP criteria met by the successful individual applicants at each of the partner universities:

TABLE 3.4:  
Number of WP  
criteria met by  
scholarship holders  
by University

Institution	Number of Criteria Met					
	1	2	3	4	5+	Total no of scholarships awarded
A	1	3	18	31	15	68
B	0	0	49	12	0	61
C	0	8	35	5	0	48
D	50	39	11	0	0	100
E	49	20	2	0	0	71
F	22	22	23	1	0	68
<b>Total</b>	<b>122</b>	<b>92</b>	<b>138</b>	<b>49</b>	<b>15</b>	<b>416</b>

It is important to explain that for some of the schemes where applicants were applying as a member of an under-represented group for their chosen course of study- e.g. women into engineering- they would have only been required to satisfy that one criteria to be eligible and as such would not have been required to answer other questions within the application process regarding their particular

personal circumstances. Consequently, they may have met several criteria but we would not know this and it will not be reflected within the figures shown in the above table.

With the above caveat taken into account, Table 3.5 below shows the characteristics and WP criteria of the 416 successful scholarship holders across the consortium:

TABLE 3.5:  
Characteristics  
and WP criteria  
of the scholarship  
holders

Gender		Mode of Study		Domicile		Transition to PGT*		
Male	Female	Full- Time	Part-Time	Home	EU	Continuer	Returner (1)	Returner (2)
163	253	385	31	397	19	271	68	77
*NB. Continuer= UG straight onto PGT Returner (1) = Gap of one year or less; Returner (2) = Gap of two years or more								
Local Authority Care Background		Carer	Disability	Financial Status	Neighbourhood Data	Under representation		
10		21	111	370	239	30		

Across the consortium some 27% of our scholarship holders satisfied the disability criteria - for one of the institutions this figure rose to 74%. A further characteristic which we felt was over-representative of the PGT student population profile was that of care leavers. We achieved 10 across the consortium, which is a small absolute number but high as a proportion of the total number of care leavers within the overall population of the partner institutions. For one of the institutions care leavers represented 0.26% of new entrants to UG for 2014/15, compared to 4% of their PGT scholarship entrants.

Our data showed that 18.6% of the scholarship holders were returners after a gap of two or more years out of education. This is of particular interest in view of HEFCE's 2015/16 PSS scheme in which to qualify for a scholarship applicants needed to be a progressor straight from undergraduate study paying a £9,000 fee. Our group of returners would be excluded from the 2015/16 scheme. This is important from a WP perspective, as we believe this group are more likely to take a break after graduating before progressing with their studies although with a higher intention to progress than those outside the defined WP group. Refer to chapter 8 for further explanation.

Similarly, the age profiles of our scholarship holders was significant in view of the Government's proposed new loan scheme for PGT Master's students. Their proposal which is undergoing consultation includes an age restriction criteria

in which only those under the age of 30 would be eligible (provided they are accepted to study a postgraduate taught Master's course in any subject.) Table 3.6 below shows the age profiles of our scholarship holders:

Scholarship Holders			
Institution	Age 29 and under	Age 30+	Total
A	42	26	68
B	45	16	61
C	38	10	48
D	86	14	100
E	62	9	71
F	61	7	68
<b>Total</b>	<b>334</b>	<b>82</b>	<b>416</b>

TABLE 3.6: Age profiles of scholarship holders

As it stands, approximately 20% of our WP scholars would be excluded from accessing a Government-backed loan scheme which included the proposed age restriction criteria and for Institution A this would rise to 38% of their WP scholars.

### 3.9 IMPACT ON STUDENTS

The data showed that we had realised our aim of supporting progression to postgraduate taught programmes among under-represented groups with recognised WP backgrounds. All partners were satisfied that the scholarship awards had made a considerable difference to the successful applicants' decision to progress to PGT study.

Encouragingly, the evidence gathered as part of our evaluation showed that our scholarship schemes had successfully targeted those who would otherwise have been prevented from undertaking PGT study. A majority (92%) of respondents to the evaluation survey confirmed that the scholarship enabled them to take up their current studies. There was also widespread agreement amongst respondents that the scholarship had helped students to make the most

...the evidence gathered as part of our evaluation showed that our scholarship schemes had successfully targeted those who would otherwise have been prevented from undertaking PGT study.

of their studies. Most agreed that receiving the scholarship had helped them to purchase necessary resources and participate more in university life. There was consensus across the respondents that as recipients of the scholarship award they felt they were more likely to continue and complete their course (Moreton et al, 2015, p.17).

### 3.10 PAYMENT OF SCHOLARSHIPS

The form of the scholarship awards varied by institution. Some paid the full amount as cash to the scholarship holder, others applied it as a fee waiver only, and others a combination of the two. Scholarship holders received cash awards in three instalments across the academic year.

As part of the evaluation, scholarship holders were asked how satisfied they were with the form of the scholarship.

Nearly all the respondents reported that they were either *very satisfied* or *satisfied* with the form their scholarship took. Interestingly, this finding contrasted to research which showed that undergraduate students greatly preferred financial awards in the form of cash over fee waivers. This finding further illustrates that the needs of PGT students and UG students are not necessarily the same (Moreton et al, 2015, p.13).

A further point of learning emerged with the initial payment of scholarships. Most of the institutions' operational systems required students to pay course fees either in part or in some instances in full at registration. However our scholarships were planned to be paid once registration had taken place. For prospective WP scholarship holders such a requirement acted as a barrier. As a project we managed this situation to support the students' progression. It is recommended that institutional systems are reviewed to address and manage scholarship scheme payment schedules and related access issues.

Most scholars wanted to be visible and welcomed opportunities to identify themselves as a group, to tell their stories to us and to each other, and to participate in institutional activities to promote postgraduate widening participation as an issue of concern.

### 3.11 SCHOLARSHIP HOLDERS AS A COHORT

Each of the consortium partner institutions treated their PSS scholarship holders as an identified group and held a celebration event to welcome them to the particular university and also to introduce them to the case for the project. We were concerned that the PSS scholarship holders may once registered want to quickly become anonymous and join the student cohort without special treatment. However, we found that the common experience across all institutions was that most scholars wanted to be visible and welcomed opportunities to identify themselves as a

group, to tell their stories to us and to each other, and to participate in institutional activities to promote postgraduate WP as an issue of concern. This enabled the project team to work with the PSS scholars on feedback and participation in other strands of the project, such as Information, Advice and Guidance (chapter 7) and Understanding the Student (chapter 8). Giving voice to the student stories about access and education became an important part of the project initiated by the scholarship holders.



FIGURE 3.2: The University of Sheffield Vice-Chancellor Professor Sir Keith Burnett, the Lord Mayor of Sheffield Councillor Peter Rippon and President of University of Sheffield Students' Union Yael Shafritz welcomed the PSS scholars to the University of Sheffield.

In order to support ongoing dialogue throughout their PGT study, some of the partners employed social media. For example several of the partners had a dedicated PSS Scholarship Holder Facebook site, to encourage a sense of community and to promote participation in the wider

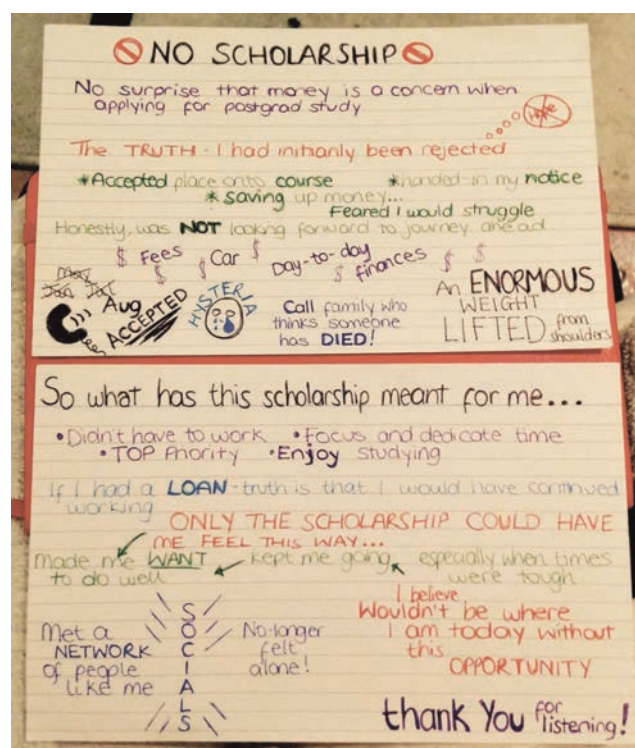
project. In our experience scholars were keen to be involved in the project and several of our scholarship holders helped to raise the profile of the project by taking part in expert panels at PGT conferences and internal events during the 2014-15 academic year. We included a panel of



five scholarship holders at the consortium dissemination conference in July 2015 and each shared their unique personal story and embodied the findings of the project's quantitative research. The testimonies were at times very moving and demonstrated the great tenacity shown by the students in pursuing their ambition of PGT study. Figure 3.3 shows the presentation 'crib notes' one of the scholarship holders prepared to prompt her to share her story at the dissemination conference.

Case study examples of the scholarship holders which include their personal testimonies can be found at Appendix 1 of this report and also on our project website at [www.postgradsupport.co.uk](http://www.postgradsupport.co.uk).

FIGURE 3.3: Scholarship Holder notes prepared for the dissemination conference in July 2015.



### 3.12 MONITORING OF SCHOLARSHIP HOLDERS

Throughout the project, scholarship holders' progress has been monitored. The purpose of the monitoring was two-fold: firstly, monitoring was a requirement of our contractual arrangements with HEFCE; and secondly, we wanted to ensure that this group of PGT students who presented with a range of WP characteristics were offered the support required to enable them to successfully complete their course.

Monitoring revealed relatively low levels of absences and withdrawal rates however it is difficult to compare with previous years as retention rate data was not available for all partner institutions and any data which was available did not account for WP characteristics.

Institution	Leave of absence	Withdrawals
A	1	3
B	5	3
C	2	0
D	3	2
E	3	0
F	2	2
<b>Total</b>	<b>16</b>	<b>10</b>

TABLE 3.7: Numbers of scholarship holders who took a Leave of Absence or Withdrew from their PGT course.

Those who have opted for a leave of absence are expected to resume their course of study in autumn 2015. It is worth noting that we recorded reasons for interruptions and withdrawals as part of the project. Disappointingly, Institution A with three withdrawals reported that the reasons given by their scholars all related to IAG issues: one pre-entry and two on-course. The first withdrawal was because the scholar felt that she was not properly advised on which course to take, and the other two withdrew because they felt that they had not been properly advised on the support services they could access to help with their studies (in particular, disability support and academic study help). All three of the withdrawals involved students who satisfied several of the WP criteria and interestingly had studied for their UG degree at post-92 institutions where they found the culture different to studying at a research intensive university. While the numbers for withdrawal were relatively small, it highlights the need for a genuinely holistic approach to supporting WP PGT students where funding is only part of the response. Evidence from our project shows that institutions must consider how they induct their WP PGT students and in particular those who studied their undergraduate qualifications at a different type of institution and those who are returners to study. A single one-size-fits-all approach to the support on offer would not work and would fail to take into account the broad range of needs represented by WP PGT students.

Within our project, any funding which became available by any withdrawals was redistributed to the scholarship cohort through a financial hardship application fund.

### 3.13 UNSUCCESSFUL ELIGIBLE SCHOLARSHIP APPLICANTS WHO STILL WENT ONTO ENROL

In order to consider whether our scholarship schemes had reached those most in need, we undertook further analysis to determine who of the original eligible scholarship applicants who were not offered a scholarship (due to the overwhelming demand) had still gone on to enrol for PGT study. Due to data protection issues each institution could only determine whether or not the applicant had enrolled at their university, so there could be additional enrolments outside of the numbers shown in Table 3.8 below.

Institution	Eligible applicants who did not receive a scholarship but went on to enrol
A	143
B	158
C	105
D	103
E	51
F	155
<b>Total</b>	<b>715</b>

TABLE 3.8: Eligible scholarship scheme applicants who did not get awarded a scholarship but went onto enrol

As Table 3.8 reveals, our records showed a minimum of 715 (54%) of unsuccessful eligible applicants went onto enrol at the institution they applied for a scholarship from. The other 46% of eligible applicants were unable to pursue their PGT study at all or at the institution of their choice due to the lack of PSS support.

Without further analysis it is not possible to interpret whether or not those who went onto enrol anyway satisfied only one of the WP criteria. The scholarships were awarded to those who based on our criteria demonstrated the greatest need. The demand created by our schemes meant that successful applicants typically met more than one of the WP measures or satisfied automatic qualifying criteria which may suggest that we have been successful in targeting those at greatest risk of not realising their PGT ambition. We can reasonably assume the participation rate of the 416 students who were awarded scholarships would have been lower had the funding offer not been available to them given their higher demonstrated need based on the criteria used.

In an attempt to further understand the outcomes of our eligible but unsuccessful scholarship applicants, the evaluation team sent them a short questionnaire to complete which achieved an approximate 20% response rate. Just under a third of the respondents reported that they had gone on to study at postgraduate level, and half of the respondents were in employment. Most of those who had progressed to PGT study had done so at a different institution to that which they had applied for a scholarship from. However it was notable that amongst those who had not progressed to PGT “financial issues” were identified as the main reason for preventing progression. 91 (out of 99) respondents cited a lack of financial support as the main reason and 61 respondents said it was because PGT study was too expensive. 95 out of the 101 unsuccessful scholarship applicants who completed the evaluation survey confirmed that they definitely would have taken up PGT study if their scholarship application had been successful. (Refer to chapter 9).

...it was notable that amongst those who had not progressed to PGT “financial issues” were identified as the main reason for preventing progression.

Those who applied but were unsuccessful in securing a scholarship are a particular group of potential PGT students. It can be assumed that they are motivated to undertake PGT study. Amongst this group it appears that the availability of financial support could make all the difference in enabling them to achieve their ambitions for further study.

The Office for Fair Access (OFFA) has reported that the offer of financial incentives through scholarships makes little or no difference to undergraduates in determining whether or not they participate in higher education at all or in their choice of institution (Social Mobility and Child Poverty Commission, 2013). Our evidence shows that by contrast PGT applicants from WP backgrounds are influenced by the availability of targeted scholarships. We will illustrate in several places in this report as we present our findings that the needs of PGT students and undergraduate students are not necessarily the same.

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### 3.14 CONCLUSIONS AND RECOMMENDATIONS

#### SUMMARY OF FINDINGS

Within our proposal to HEFCE we stated that as a consortium we would develop, implement and evaluate a Pilot Scholarship Scheme, offered at scale to test or prove demand and to improve take-up of taught postgraduate programmes, particularly among under-represented groups with recognised undergraduate WP backgrounds.

As this chapter has shown we met our aim and by so doing successfully delivered the largest single postgraduate taught scholarship offer the country had seen. Evidence from our project revealed that:

- Universities could develop the criteria, launch and operate a postgraduate taught scholarship scheme in a timely way;
- Universities were prepared to match fund and seek additional benefactor funding against a state contribution to deliver postgraduate taught scholarships;
- Widening participation criteria for postgraduate study were possible to develop and can be operated successfully to target and select students for awards;
- There was unmet demand from eligible applicants for an appropriately promoted postgraduate scholarship scheme using widening participation criteria;
- Those who return to postgraduate study rather than progress directly from their undergraduate studies are more likely to have widening participation characteristics which have prevented their earlier progression to PGT;
- Single, simple and clear scholarship schemes were easier to promote, attract more applications, less ineligible applications and higher acceptance rates than more complex or fragmented offers;
- The availability of scholarships had a significant influence on the applicants participation in higher education at postgraduate level;
- The scholarship holders wanted to be a visible group amongst the student population and welcomed opportunities to tell their stories to us and to each other, and to participate in institutional activities to promote PGT widening participation as an issue of concern.

#### RECOMMENDED ACTIONS

Our project has made clear that there is a place for PGT scholarship schemes within any proposed funding solution aimed at improving the take-up of taught postgraduate programmes among under-represented groups with recognised undergraduate WP backgrounds.

- It is recommended that the provision of scholarships is considered as one element of the assistance required by graduates from under-represented groups into postgraduate study. A holistic approach is recommended which ensures all PGT WP students are provided with a relevant support package at the outset of their studies. And in addition, institutions should consider establishing an identifiable community of students from WP backgrounds to enable them to meet with other students from similar backgrounds.
- We would recommend that any future scholarship schemes be centrally operated within universities. This would benefit both the applicant and the institution.
- Institutions should review their internal registration systems to ensure that provision is made so that PGT students from WP backgrounds are not required to pay upfront costs prior to receiving any loan or scholarship award.
- Further we would recommend additional research. In considering scholarships it would be beneficial to commission research into how best to support WP graduates who rely upon state benefits.
- In addition, the 416 scholars who have benefitted from this project provide a valuable opportunity to undertake longitudinal research to evaluate the impact of these scholarship awards on the scholars' careers, earnings and lives ahead.

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# Chapter 4 Professional Career Development Loans

DR. TONY STRIKE *University of Sheffield*

HELEN DINGLE *University of Sheffield*

& JACKIE TOYNE *University of Sheffield*

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## 4.1 INTRODUCTION

Within our proposal we stated that we would investigate how the financial strength of the HE sector could be used to co-design, launch and pilot a Professional Career Development Loan scheme which would be:

- Designed to increase the general level of available loan funding for PGT students. With the intention that a successful pilot would provide the foundation for a national scheme.
- Targeted at WP Postgraduate Taught students.

Our proposal stated that an allocation of £480,000 from the HEFCE PSS fund would be matched by the institutions (£80,000 each) to create a launch loan fund of £960,000. The aim was that these funds would be used as capital for a number of loans to eligible students based on criteria agreed through the project.

In preparation for offering loans we would choose a financial partner(s), discern the balance between commercial and social responsibility drivers and assess the partner's risk appetite. Our proposal to HEFCE did not describe a particular route but instead we sought flexibility to explore a number of potential financing avenues.

We felt that this approach would provide us with the best opportunity for the universities to be innovative and develop fit for purpose funding solutions alongside a lender who would support the future development of PGT education across the UK.

In this section we will describe the activity we undertook to meet this objective.

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## 4.2 BACKGROUND

Concern had been raised in the sector about the limited access to finance for postgraduate students who were not eligible for student loans. Evidence had shown that most postgraduate students were self-funded, especially those undertaking taught courses (HEFCE, 2013).

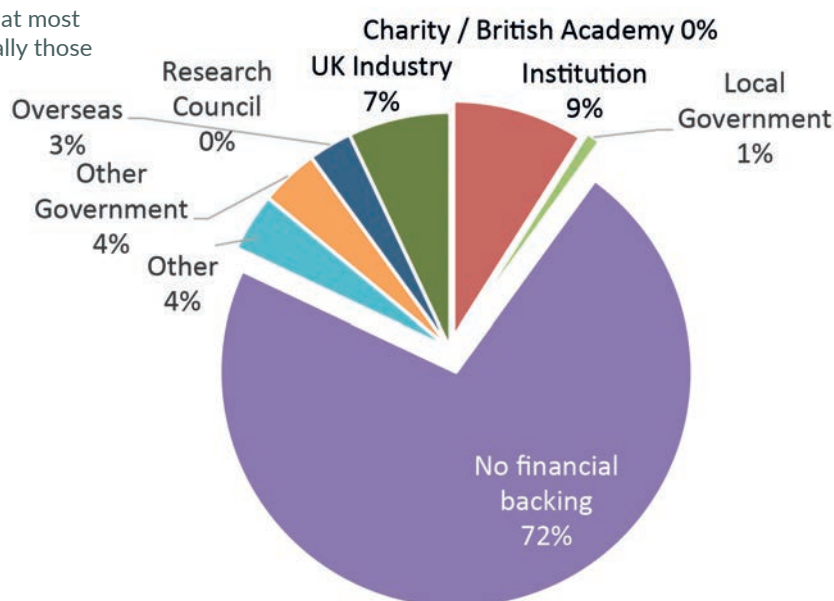


FIGURE 4.1:  
Sources of Postgraduate Finance- PGT  
(Source: HEFCE, 2013)



As shown in Figure 4.1, HEFCE's research found that the majority of PGT students (72 %) had to finance their studies themselves or via a bank loan. Specific postgraduate courses attracted support from Professional and Career Development Loans, products currently offered by two UK banks namely Barclays and The Co-operative. However not all students were eligible for these loan products, and the take up was low even by those students who were eligible. The repayment terms of the existing products were considered to be stringent compared to the undergraduate loan and of particular concern was the requirement to commence repayment one month after course completion, irrespective of whether or not the borrower had secured employment. Table 4.1 below shows the payment terms applied to Professional/Career Development Loans offered by the banks at the commencement of our project:

	Career Development Loan
1. Interest rate	9.9%
2. Amount of loan	Up to £10,000
3. Repayment start date after completing your course	One month
4. Repayment period	One to five years

It is important to note that our project team was developing this strand of activity prior to the Autumn Statement of 2014, in which the Government announced its intention to consult on and introduce a new government-backed loan system for postgraduate taught Master's students. In the subsequent consultation documentation issued, they proposed that anyone under age 30 who was accepted to study a postgraduate taught Master's course in any subject would be eligible for an income contingent loan of up to £10,000.

**TABLE 4.1:**  
Terms of the existing career development loan schemes

### 4.3 CONTEXT OF OUR PROJECT WITHIN HEFCE PSS PGT SCHEME OF PROJECTS

In the development of our financial product, we were mindful of the need to broaden the evidence base available to the sector and add value to what was already being progressed by the other two universities which had received HEFCE PSS funding to develop financing options as follows:

#### • Cranfield University

We understood that Cranfield was awarded £2m HEFCE funding with an institutional match of £1.33m to establish an affordable and sustainable funding mechanism for loans to PGT. Cranfield worked with Prodigy Finance Ltd with whom they had an existing relationship and had developed a loan scheme for MBA students. Their PSS project concerned the introduction of a further loan product aimed at PGT students undertaking STEM subjects.

Their product would be available to UK and EU domiciled students accepted on to full time, technology based courses at the university. There would be up to 100 loans available each year with the potential to support more than 1,000 students over their ten year study. Applicants would be scored against credit criteria but potential future earnings provided by DLHE data was also taken into account. This finance scheme would provide postgraduate loans at the same interest rate as undergraduate loans. This product was launched in January 2014.

For more information please see:

[www.cranfield.ac.uk/study/postgraduate-degrees/fees-and-funding/funding-opportunities/cpls/cpls.html](http://www.cranfield.ac.uk/study/postgraduate-degrees/fees-and-funding/funding-opportunities/cpls/cpls.html)

#### • The University of Durham

We understood that Durham was awarded funding to explore the development of a Credit Union, the common-bond of which would be staff, students and alumni. The credit union would offer PGT Master's tuition fee loans, creating a new and innovative model which would be self-sustaining over time.

The Credit Union model would support social mobility by giving students access to funds at low cost. Durham received £1.2m HEFCE PSS funding which would be matched with £250k from Durham University and a further £750k match by depositors in the Credit Union. The intention was that 70 students per annum would benefit from the scheme. This product is due to be launched during summer 2015.

---

## 4.4 OUR PARAMETERS

At the outset, our project set and adhered to the following parameters whilst entering into preliminary negotiations with potential partners in the financial sector to find an appropriate commercial partner:

- Protection of students' interests (acknowledging that a proposed lender may target specific profession related areas);
- Protection of the University's reputation;
- The University would not become a lender and would not accept financial risk such as a default risk. Any risk would need to rest between the lender and the student.

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## 4.5 CRITERIA

Further we agreed a set of criteria which potential lenders needed to satisfy in order for discussions to proceed. The criteria were:

1. The proposed lender must be flexible enough to be able to develop a new loan product suitable for PGT within the project timescale. This would need to include the development of credit rating criteria suitable for PGT students. (As a minimum, we wanted the flexibility of a payment holiday/grace period after completing the course; the flexibility of having a product which offered the possibility of a combined loan/scholarship funding package; and a product which avoided a one size fits all solution);
2. The proposed lender must have the infrastructure and management capacity in place to manage the project and have a proven track record in managing loans at volume of the likely amount i.e. in the region of £25k;
3. The proposed lender would ideally be prepared to commit capital funding to the project;
4. The product should be nationally scalable;
5. The product should be financially sustainable.

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## 4.6 FINDINGS

The project team approached a number of financial institutions in order to explore the development of a new PGT loan product. Each of the financial institutions was

assessed against our project criteria listed at 4.5. Table 4.2 below provides a summary of our findings:

TABLE 4.2:  
Assessment  
Criteria and  
scoring applied  
to financial  
institutions

	Criteria 1	Criteria 2	Criteria 3	Criteria 4	Criteria 5
High Street Bank 1	✓	✓	✓	✗	✗
Credit Union	✓	✗	✗	✗	✓(Limited)
Non-traditional lender	✓	✓	✓	✓	✓
Crowd Funder	✓	?	✗	✗	✓(Limited)
High Street Bank 2	✗	✓	✗	✗	✗
Building Society 1	✗	✓	✗	✗	✗
Building Society 2	✗	✓	✗	✗	✗
Building Society 3	✗	✓	✗	✗	✗

---

In general our discussions with the financial institutions revealed that there was little appetite to lend to this atypical market and a widespread reluctance to manage the risks involved. The recent financial crisis had led to criticism being levelled at the mainstream banking sector in which they were labelled as irresponsible lenders. As such the financial sector as a whole was facing tighter regulation and we encountered a prevalent risk adverse attitude towards extending the range of loan products on offer to include new postgraduate loan products. We found that Building Societies with a tradition of large-scale secured long-term loans disliked the unsecured nature of postgraduate loans. High street banks tended to make short term unsecured loans against a credit rating system which unfettered would fail those about to leave employment to study, those without a credit history or those without access to other forms of security. Credit unions had experience which was restricted to offering low-value short term loans. This segmentation tended to lead to either a very narrowly-cast new product proposal, where the perceived risk was deemed to be lower, or financial institutions adopted a “wait and see” approach.

As shown in Table 4.2 we discovered only one potential financial partner who met our criteria fully, a non-traditional lender, Metro Bank. Having established in 2010, it already operated a Professional Studies Loan product with the University of Law. Our discussions with them developed to the stage of agreeing in principle to the launch of a PGT Loan for students seeking to enrol on PGT study at any one of the six consortium institutions in 2015.

The intention was that the bank would base borrowing eligibility on the potential future earnings of postgraduate qualification holders from different disciplines. The consortium partners were investigating this by using DLHE data.

When we reached this agreement in principle, the preparations to design and launch a new product were halted by the announcement of the Government's intention to introduce income-contingent loans for postgraduate taught Master's courses in any subject for those under the age of 30. The Chancellor's announcement included the statement:

*“The loans, of up to £10,000, will beat commercial rates”.*  
(Autumn Statement 2014)

As such Metro Bank felt that it was no longer in a position to pursue the proposal with us.

It is important to acknowledge that the loan product in development with Metro Bank would not have been inclusive to all PGT study and the product would have been piloted with those students enrolling on PGT courses which were viewed as offering the highest future earnings potential.

As with other aspects of postgraduate study we found that the evidence held at institutional level relating to the earnings of former postgraduate students and postgraduate course outcomes was not readily available and was not as comprehensive as undergraduate outcome data. As we strive to protect the PGT market and attempt to address WP barriers which can prevent progression to PGT it is critical that the sector considers its availability of data and extends the evidence base to include outcome data such as employment destination and earnings for this population. The recently announced changes in legislation allowing record linkage to HMRC for identifying earnings of graduates/postgraduates is welcomed and should assist in this regard.

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## 4.7 ANNOUNCEMENT OF GOVERNMENT- BACKED LOAN SCHEME

In its announcement of the proposed loan scheme for home postgraduate students, the Government was seen to be responding to the unanimous recommendations of various recent research reports concerned with financing postgraduate study including: the CentreForum (Leunig, 2011), the Higher Education Commission (2012), the Social Mobility and Child Poverty Commission (2014) and the National Union of Students (2012).

According to the Government's announcement, the loans would be:

- To a value of £10k;
- Limited to students under the age of 30 years;
- Repaid concurrently with UG loans;
- At a lower rate than commercial loan rates.

As a consortium we welcome the Government's announcement and its funding commitment to postgraduate students. However, we propose that the Government ensure that this is not the sole approach to financial support which

they adopt and that they consider the potential impact of offering a universal loan scheme for graduates with WP characteristics. Our PSS project has focussed on targeting WP postgraduate students and we are concerned that the introduction and reliance upon a universal loan scheme without other forms of financial support being offered will act to contradict efforts to widen participation and may lead to further social inequality at this level.

Our project has shown some indications that undergraduates from WP backgrounds with very high debts of £20k and above found those debts proved a barrier as they were more concerned about extending their student debt burden than those from more affluent backgrounds (refer to in chapter 8). As such they may be less inclined to extend their student debt by progressing to postgraduate study via a postgraduate Master's loan. Careful consideration is required to prevent the availability of loans simply making it easier for those who are already socio-economically advantaged to proceed to postgraduate study without improving the situation for those who are disadvantaged.

TABLE 4.3:  
Profiles of PGT  
Home Students  
2013/14  
(Source: HEIDI)

Age on entry	Under 18	19	20	21-24	25-29	Over 30
Total Number of PGT Home Students	60	15	785	62,960	35,635	71,885
%	0	0	0.5	36.7	20.8	41.9

As shown in Figure 4.1, postgraduate education is currently supported by investments from a diverse mix of public and private sources. Many postgraduates currently fund their own fees and living costs, whilst a significant proportion are supported in full or in part by their employer or receive a scholarship or other financial award to help fund their studies. Attention needs to be paid to ensure that any new publicly subsidised loan scheme does not simply displace the very substantial private funding which currently supports most postgraduate study.

We are concerned that the Government's PG loan proposal included their intention to restrict the loan offer to those under the age of 30 years only. According to HEIDI data (shown in Table 4.3) for 2013/14, nationally over 40% of PGT Home students were aged 30 or over at the time of registration.

Within our pilot, 20% of our WP scholarship holders were over the age of 30 at time of enrolment (refer to Table 3.6.). This shows that there is considerable demand to progress to PGT study after age 30 from those without other means to pay. The rationale provided by Government for inclusion of this age restriction in their loan proposal was that their research found that mature postgraduate taught Master's students (26+years) were in a more solid financial situation than younger students (BIS, 2015, p.18). Within our project we found that those who chose to return or progress at age 30 and above often had WP characteristics (such as a disability, were a former care leaver, had caring responsibilities for either a young family or disabled member

of the family) which had prevented their earlier progression to PGT and that they were not in strong financial situation, and the introduction of an age restriction criteria to the loan offer would act as a further barrier to exclude them from study at this level.

We found that those who chose to return or progress at age 30 and above often had WP characteristics (such as a disability, were a former care leaver, had caring responsibilities for either a young family or disabled member of the family) which had prevented their earlier progression to PGT.

This issue was raised by two of our project scholarship holders, a former care leaver and a single parent, who participated within our dissemination conference in July 2015 and both were over the age of 30 at commencement of their postgraduate study. During the panel discussion they explicitly and forcefully voiced their objection to this age restriction being placed on the loan scheme. Both shared how their life experiences meant that it had taken them a greater amount of time to be ready to undertake PGT study and they felt that the implementation of an age restriction to the proposed loan scheme would exclude others from similar backgrounds the opportunity to study at this level. This would suggest that the Government consider waiving the *under 30 years* age criteria (if retained at all) for those who meet certain qualifying WP criteria.



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## 4.8 CONCLUSIONS AND RECOMMENDATIONS

### SUMMARY OF FINDINGS

We intended to work with the financial sector to investigate how the combined strength of the HE sector could be used to co-design, launch and pilot a Professional Career Development Loan scheme, which would:

- increase the general level of available loan funding for PGT students.
- target at WP Postgraduate Taught students.

We undertook extensive activity to this end. However, due to the Government's announcement of their income contingent loan of up to £10,000 our plans to launch a pilot scheme with a commercial partner were thwarted. That said we feel we learnt valuable lessons by going through the process which should inform any future government-backed PGT loan scheme.

Our project supported the principle that there should be some form of government-backed loan scheme support for taught postgraduates. It was felt that the Government's proposal would act to increase and to some extent widen participation in postgraduate study. However, we found considerable opposition to the proposed age restriction to the loan offer raised by not only colleagues across the partner institutions but also the current postgraduate scholarship holders.

Our project has shown that the introduction of a loan scheme would not in itself be sufficient to support WP at postgraduate level. Our project has found that graduates from disadvantaged backgrounds are more concerned about extending their student debt burden than those from more affluent backgrounds (refer to chapter 8). As such they are less inclined to extend their student debt by progressing to postgraduate study via a postgraduate Master's loan.

### RECOMMENDED ACTIONS

- Our project supports the proposed government-backed loan scheme but would recommend that the Government give due consideration as to whether the proposed under 30 years age restriction should be retained in the plans at all or waived for those with WP characteristics.
- We believe that the loan scheme should be seen as part of the funding solution, and not the whole solution. Our project has shown that graduates from disadvantaged backgrounds may feel less inclined to extend their student debt and as such may be less likely to progress to PGT study.
- Further we recommend that research is commissioned to determine the impact of any introduced loan scheme on fee levels across the sector.





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# Chapter 5 Raising Matched Funding

HELEN BARTON *University of Manchester*  
& JANE HARDMAN *University of Manchester*

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## 5.1 INTRODUCTION

As noted in chapter 4, a central activity of our consortium's PSS project was the development of a pilot postgraduate scholarship scheme. In funding the scholarships, each institution was required to provide at least a 100% match for the HEFCE funding.

In the main, the match came from institutional funds. Some partners were successful in raising some of the match

funding required through new philanthropic giving, although this remained a small proportion of the overall matched funds required.

In this chapter we will outline the activities taken by consortium partners in raising new matched funding, and evaluate the successes and challenges of the different routes explored.

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## 5.2 PHILANTHROPIC FUNDING

Each consortium partner made contact with their Development Office, to explore opportunities for raising philanthropic funding. Levels of engagement from development offices varied, often reflecting the position of postgraduate taught study and WP in University philanthropic priorities.

Three partners secured matched funding for the 2014 pilot scheme through existing bequests and endowments. Two of these were able to draw on these funds again for 2015; the third partner found a full match for the 2015 scheme through a central fund, and have the opportunity of using bequest funding in future.

Raising *new* donations targeted towards supporting Master's students was initially felt to be challenging (philanthropic giving targeted at particular backgrounds tend to be directed towards undergraduate students, and where discipline-based it tends to be directed towards a particular research area).

However, partners who were active in pursuing new funding reported success.

- **SMALL GIFTS**

The University of Sheffield trialled differentiated approaches to small gifts fundraising for the pilot scheme, with a targeted approach to large donors via a "double your money" telephone campaign, and an appeal for smaller donations via a flyer in the alumni magazine. These approaches raised £47,000 at a cost to the institution of £750.

The success of these activities was encouraging, and several other consortium partners subsequently reported very positive engagement from their Development Offices in relation to fundraising activities for PSS 2015 and beyond.

Activities undertaken during the project show that it is possible to raise new funding specifically to support Master's study through philanthropic giving.

FIGURE 5.1 University of Sheffield's Donor Campaign



The  
University  
Of  
Sheffield.

Development  
Alumni  
Relations &  
Events.

## Help a new generation – donate today

**£50 DONATION=  
£100 TOWARDS  
POSTGRADUATE  
SCHOLARSHIPS**

The University of Sheffield has been selected as one of a number of universities in the UK to receive government funding from the Higher Education Funding Council for England (HEFCE) that will match pound for pound any gift made towards scholarships for the academic year 2014/15.

As a member of the University of Sheffield community, you will realise what an incredible opportunity this is. My Master's degree was the perfect launching pad for me to study for a PhD at Sheffield. It taught me how to develop my skills in independent enquiry and allowed me to specialise. I was supported by excellent academic supervision and a learning atmosphere that is typical of Sheffield University.

I could not have studied for my Master's degree without a scholarship funded by generous donations from alumni and friends. Now, for one year only, we have a chance to double the impact of your generosity. With the match funding opportunity provided by HEFCE, a £50 gift will now become £100. If you are a UK taxpayer and can Gift Aid your donation, an additional 25p will be added to every pound you donate. With Gift Aid, your £50 donation will become £125 for postgraduate scholarships – more than double your original gift!

The University wants to make these awards in July 2014, so we only have a short period to raise additional funds.

To make the most of this limited opportunity, please donate today using the form overleaf.



There are so many bright students who do not consider postgraduate study simply because they cannot afford to do so. Student support is a top priority across the University, for every Department and Faculty. Together we can enable these students to unlock their potential by reaping the benefits of postgraduate study at Sheffield – just like I did.

With best wishes

**Emily Shackley**

BA English Literature 2011

MA Nineteenth Century Studies 2012

## • MAJOR GIFTS

Raising matched funding through major gifts was felt to be challenging by all partner institutions, partly because the typical lead time to secure a major gift is around 18 months, and both the 2014 and 2015 schemes were announced relatively late. While the landscape for postgraduate funding remains unclear, it was considered difficult to begin to develop relationships aimed specifically at supporting PGT students.

However, two consortium partners actively targeted major donors in support of PSS 2015. At the University of Sheffield, the celebratory welcome event for 2014 PSS recipients was timed to follow an Alumni Board meeting, with major donors invited to attend the event. This fundraising activity enabled this partner to offer 8 PGT scholarships of £10,000 each for

2015, although HEFCE restrictions around PSS 2015 criteria meant that they could not be awarded under the PSS scheme, and have been offered separately. The second institution raised £176,000 through donations from individuals. This means that 12% of the institutional match required for the scholarships to be awarded from the 2015/16 PSS scheme was funded by philanthropic donations.

Another partner received a major donation from a single alumnus, securing scholarship funding of £10,000 for each of the next 10 years.

Table 5.1 below shows the amounts of matched funding raised by each institution. Match secured through existing bequests shown in brackets, and new matched funding is shown in bold.

TABLE 5.1:  
Matched funding  
from existing (in  
brackets) and  
new (in bold)  
bequests

Matched funding from philanthropic sources			
Institution	2014	2015	Total new funding raised
A	(£300,000)	(£300,000) + <b>£110,000</b>	<b>£110,000</b>
B	£0	£0	£0
C	(£200,000)	£0	£0
D	<b>£47,000</b>	<b>£129,000</b>	<b>£176,000</b>
E	(£70,500)	(£50,000)	£0
F	<b>£100,000</b>	£0	<b>£100,000</b>

## • EMPLOYERS

Activities aimed at raising funding for Master's scholarships from employers did not gain much traction during the project. Without a fuller understanding of the value of a Master's qualification to specific employers it was generally felt difficult to begin to have these conversations.

Internal structures within institutions also presented an issue: interactions with employers would tend to be in the domain of Careers Services and/or Business Engagement departments; however the focus and expertise within these departments would be on employability rather than fundraising.

One partner initiated discussions with their Business Engagement team; however, their focus was on developing consultancy and research collaborations, with little engagement on PGT.

Another partner began work through their Careers Centre to develop a framework for approaching employers, although the employers approached were those who contributed to other activity, and felt unable to stretch their commitments further.

## • USE OF CASE STUDIES

It was agreed by all partners that case studies could be a powerful channel for attracting donor funding, and the success of the 2014 pilot scholarship schemes meant that institutions had a rich source of examples to draw upon showing how funding had made a difference to individuals.

It was agreed that style and content of case studies to support philanthropic fund-raising must be pitched appropriately, and brief initial guidance was developed. Partners successfully developed case studies to support fundraising activities for 2015.



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### 5.3 EUROPEAN FUNDING

The use of European Social Fund funding to provide a match was actively considered by the majority of consortium partners. HEFCE was consulted and confirmed that European Social Funding was a suitable match for HEFCE funding, and that the national framework includes PGT, but that bids would be determined by priorities at the local level.

This presented a barrier to initial discussions around a collaborative bid by the consortium, in that the focus of individual Local Enterprise Partnerships (LEPs) were likely to differ.

Some partners began discussions around joint bids with local institutions, however it was felt that differences between institutions in terms of programme portfolio and student demographics would be a barrier.

Two partners met with their LEP and higher level skills funding colleagues, to explore the possibility of raising matched funding for the 2014, and later for the 2015 schemes. However timing proved to be an issue, both in terms of the timing of calls for proposals (late March) in relation to the start of the academic cycle, and the lead time for preparing a successful bid (often several months).

It should be noted that the process for securing European Social Funding is fairly bureaucratic and specialised, and that dedicated resource would be needed to put together a successful bid.

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### 5.4 CONCLUSIONS AND RECOMMENDATIONS

#### SUMMARY OF FINDINGS

- Activities undertaken during the project show that it is possible to raise new funding specifically to support Master's study through philanthropic giving. Activities targeted at small gifts from alumni are relatively low cost and simple to implement, with encouraging returns. Gifts from major donors take more lead time and more effort, but again, the project has shown that funding for postgraduate taught study can successfully be raised through this route.
- The funds raised through philanthropic giving were small in relation to the totals required and fundraising efforts relied on this donations being matched from HEFCE or institutional sources.
- The engagement of institutional Development Offices was key. Development Offices may have concerns around philanthropic fund-raising specifically for Master's level study, and a small-scale pilot may be necessary to prove the concept. However, engagement will be strongly influenced by the position of postgraduate study in institutional philanthropic priorities.
- A greater understanding of the value of a Master's for access to particular professions is needed to articulate the case for raising funding through employers.
- It may be possible to raise matched funding through European Social Funding, however factors around lead time and resource mean that institutions would need to consider this as a medium to long-term "rolling" option. It is unlikely that matched funding could successfully be raised through this route while the broader landscape around postgraduate funding remains uncertain and institutions are operating on a year-to-year basis.

#### RECOMMENDED ACTIONS

- The project has shown that it is possible to raise funding for Master's scholarships through philanthropic giving, and outside of any (as yet unknown) obligations around the matched funding for future scholarship schemes, institutions may wish to commit resource to this activity.
- It is recommended that further work is carried out to develop templates for differentiated types of case study for different audiences (alumni, major donors, employers, recruitment teams).
- It is recommended that further research is carried out into the value of a Master's qualification, both in terms of progression in specific careers and in the development of "other" skills to assist employability. Findings should inform the development of a framework for approaching employers.
- It is recommended that institutions take a long-term view on whether to pursue European Social Funding, and if so, dedicated resource is recommended. This decision might be deferred until the landscape for postgraduate funding is clearer, and institutional obligations for matched funding for any national scholarship scheme are known.



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# Chapter 6 Academic Innovation In PGT Programmes

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## 6.1 AIMS

The aims of the academic innovation strand of the collaborative project for the HEFCE Postgraduate Support Scheme 2014-15 were:

- To design, deliver and evaluate pilot programmes with a view to supporting inclusion of under-represented groups at postgraduate level.
- To identify case study examples of PGT WP innovative academic best-practice across the Consortium
- To provide the sector with a best-practice template that would aid innovation in this area.

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## 6.2 SCOPE

Our strand activity included:

### PILOT COURSES

- **Postgraduate Award in Career Development** (Warwick Business School and Centre for Lifelong Learning) an on-line course for recent graduates not in employment or further study and who would not be able to bear the costs of postgraduate study;
- **Gateway to Postgraduate study** (Centre for Lifelong Learning, University of Warwick) (non-accredited) a taster to encourage direct entry to postgraduate study for local students without a first degree but with professional or other relevant experience, and those who had not been in higher education for several years.
- **Postgraduate Awards programme** (Centre for Lifelong Learning, University of Warwick) individual accredited modules to enable a flexible approach to learning, designed to support progression of WP undergraduate students to Master's level and mature learners with additional work and personal responsibilities;
- **Postgraduate Award in Innovation Business Leadership** (Warwick Manufacturing Group) short on-campus modules designed to support the engagement of SMEs in staff development and up-skilling at postgraduate level and retention of students who are employees of Small and Medium Enterprises (SMEs).

Demographic data about the students who enrolled on these courses was captured in a mixture of quantitative and qualitative evaluation methods to measure how successful the courses were in attracting students from the WP and underrepresented groups identified. We also monitored retention to assess the impact of modifying the delivery methods of the courses.

### REVIEWS OF THE USE OF INTEGRATED MASTER'S & THE VALUE OF A MASTER'S QUALIFICATION FOR ENTRY TO FUNDED PGR STUDY

- We analysed the growth of integrated Master's and considered their use as a possible solution to Master's funding for Home/EU students.
- We examined data on the highest qualification at entry for new PhD students across several cohort years to consider the value of a Master's qualification as an entry to funded PGR study.

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## A TOOLKIT FOR INNOVATION

- Online toolkits are now a well-established aspect of staff development for staff in higher education. They offer support for staff by providing guidance and practical advice on a range of topics. Their construction allows for users to navigate the sites according to their needs and to be guided towards resources that can address particular challenges and/or opportunities that they face in learning and teaching.
- An online tool kit to aid innovation in the creation of PGT programmes has been developed by the University of Sheffield on behalf of the consortium. The aims of the online toolkit are to provide guidance to higher education staff on how to develop PGT programmes that are innovative in design, content and delivery and to offer case studies of best practice. The tool kit is available at: [www.sheffield.ac.uk/lets/pgttoolkit](http://www.sheffield.ac.uk/lets/pgttoolkit) and a copy of its site map is available at Appendix 2.
- We collected wider data and case studies of innovations in postgraduate taught programmes from all partners in the Consortium. These were drawn on and included in the materials for online toolkit

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## 6. 3 RECOMMENDATIONS

### FLEXIBILITY

It is recommended that Universities review their provision in respect of their flexibility for supporting access, retention and progression particularly for those who cannot undertake full-time programmes and who have care and employment responsibilities. There are many areas where flexibility can be considered including: entry requirements; the timing of taught components; modular degree approaches; assessment patterns; and the use of technology-enhanced learning. This may have benefits for all students, regardless of their status including those who are under-represented or designated as widening participation.

Whilst flexibility will support all students, Universities should consider the specific characteristics of target groups for widening participation and under-representation. They should consider how bespoke interventions can be designed to aid their participation in postgraduate study. Our evaluations indicated:

- Student access to the facilities of University careers services and broader employability opportunities during their degree programmes can be impeded by personal circumstances. Targeted intervention through the form of postgraduate provision focussed on career development, particularly when it is provided immediately upon graduation, may provide a 'second chance' to develop the necessary skills and understanding to access graduate employment.
- *The SME sector* of employment requires further consideration in terms of the support provided by Universities. Company demands mean that it can be difficult to regularly release staff when there is considerable reliance on very small teams or work groups. Universities should work closely with employers and students in this sector in the co-design and adaptation of programmes to enhance attendance, retention and progression.
- Universities need to evaluate how their postgraduate portfolios facilitate alternative entry to include greater recognition of prior experience. Our case studies demonstrate that gateway programmes that recognise prior experience for mature learners without first degrees can provide the stimulus to local students to enter at this level.

### PROFESSIONAL SUPPORT

- To ensure sustainable and embedded provision in an area of widening participation that is relatively new as an institutional issue to UK Universities, academic and institutional leadership is necessary to support innovation in postgraduate provision that recognises the need to widen participation and create greater inclusion for under-represented groups.
- There has been exceptionally little focus on the development and innovation of good practice in widening participation and inclusion of under-represented groups at postgraduate level and Universities should extend their resource and investment as currently found at undergraduate level to this group of students. With this in mind, the PGT Innovation Toolkit is an Open Educational Resource for the HE sector and offers staff in Universities a range of resources that can support innovation and inform course development and delivery.



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## 6.4 INNOVATIVE PRACTICE IN HIGHER EDUCATION INSTITUTIONS

- Hannan and Silver (2000, p.10) note how innovation in higher education has generally been understood as *“a planned or deliberate process of introducing change, directed towards (but not necessarily achieving) improvements or solving or alleviating some perceived problem”*. Such change may, for example, be associated with outcomes such as student satisfaction or in the case of this study with participation rates of those least likely to progress to postgraduate study. Yet despite this definition, innovation is rather an opaque concept; many innovations are actually the transfer of practice from one setting to another. In such cases, innovation may be new practice in one discipline or institution and yet seen as outdated in another. Further, one cannot assume that any improvements desired from innovation are not going to create an inferior or poorer outcome in other areas.

The desire to improve participation rates for certain categories of student may, for example, lead to compromises in other areas of provision. Further, as Hannan and Silver (2000) note, when the term innovation is used it is now frequently associated with the use of new technologies. This is perhaps even more the case with developments across the past decade that has created a highly interactive digital world (see for example, Sharples et al, 2013).

- As we detail, the development of innovation in respect of the diversity of those who are ‘least likely’ requires correlation with discipline and institutional markets, as well as creative engagement with some of the radical pedagogies that have informed undergraduate access programmes.

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## 6.5 WHY WE NEED TO INNOVATE?

As explained in chapter one of this report, the national picture for postgraduate education is changing and since 2012 there has been a marked decline in numbers entering postgraduate level education in the UK.

Because the postgraduate population is so diverse it is difficult to state categorically what the underlying causes of this decline are. What we do know, nonetheless, is that the costs of postgraduate study have a disproportionate impact on widening participation and under-represented groups. In order to make postgraduate study possible for these groups it is first necessary to identify and address the barriers, actual and perceived, for these students by developing and implementing new academic programmes in order to encourage access, fairness and social mobility through postgraduate taught provision.

These concerns need to be set against HESA data that shows a doubling of student numbers on integrated undergraduate Master’s programmes in the past 5 years. This may be explained by the fact that the integrated Master’s is a seamless qualification with the Bachelors degree and as such tuition fees and living costs can be met through the state-backed undergraduate loan scheme. Changes to the provision of loan-funding for postgraduate courses could begin to reverse this trend from 2016-17 but, under the current proposals, students taking out both undergraduate and postgraduate loans will face less favourable repayment terms than those with only undergraduate loans. Innovation in postgraduate provision is one option for responding to student demand for affordable postgraduate Master’s programmes.

The current model of postgraduate taught provision leans largely towards younger learners who progress soon after graduating from their first degree. The changing picture nationally suggests that demand for postgraduate taught study is likely to shift towards older learners as those younger learners find themselves encumbered with rising levels of student debt. Older learners returning to study are more likely to look for flexibility to accommodate work and family responsibilities, for courses which contribute to career development and for personalised learning accumulated and paid for incrementally.

The increasing importance of a Master’s qualification as an entry point for postgraduate research has implications for the future demand for taught Master’s programmes whether delivered as integrated undergraduate Master’s programmes or as stand-alone postgraduate courses. The availability and preferable repayment terms for funding for integrated Master’s may have considerable impact in the near future despite the fact that integrated Master’s are not widely recognised outside of the UK. To safeguard the economic and social mobility of home students it is crucial that innovation in postgraduate provision expands the options for Master’s level study beyond the current restrictions imposed by the funding provision.



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## 6.6 WHAT IMPEDES INNOVATION?

Institutional procedural, logistical and systemic factors can impede implementation of new programmes. Course approval is an example of a process through which proposals need to pass at numerous levels and this is inevitably time consuming. Where cross-faculty collaborations are involved in developing a course, as is becoming increasingly important, the approvals process becomes even more complex and drawn out which in itself becomes a disincentive for innovation for those involved.

Institutional commitment in the form of academic leadership is essential for reducing the impact of these barriers to innovation. This includes the integration of concerns for widening participation at postgraduate level in institutional strategies as well as providing the necessary support, including facilitation through governance and approval processes and financial provision, where appropriate.

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## 6.7 TRIALLING NEW PGT COURSES TO ATTRACT WP STUDENTS

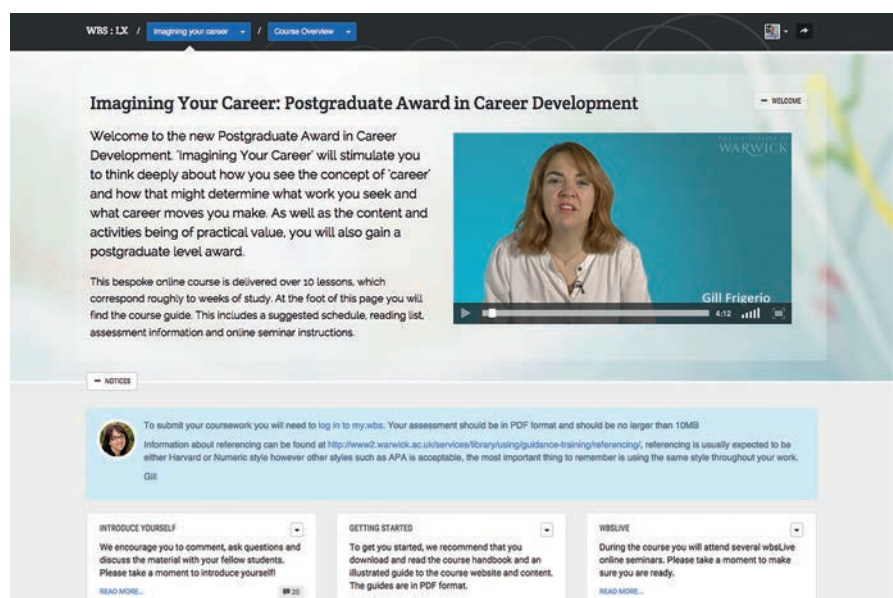
The University of Warwick introduced four new postgraduate level courses during 2014-15, each designed to provide targeted support to a range of under-represented groups of potential students. These courses were designed to address barriers to accessing postgraduate taught study that would be common to multiple groups in the expectation that greater numbers of students from WP and underrepresented backgrounds would be able to access these courses than would otherwise be the case. Refer to Figure 6.1.

### Recent Graduates: Postgraduate Award in Career Development

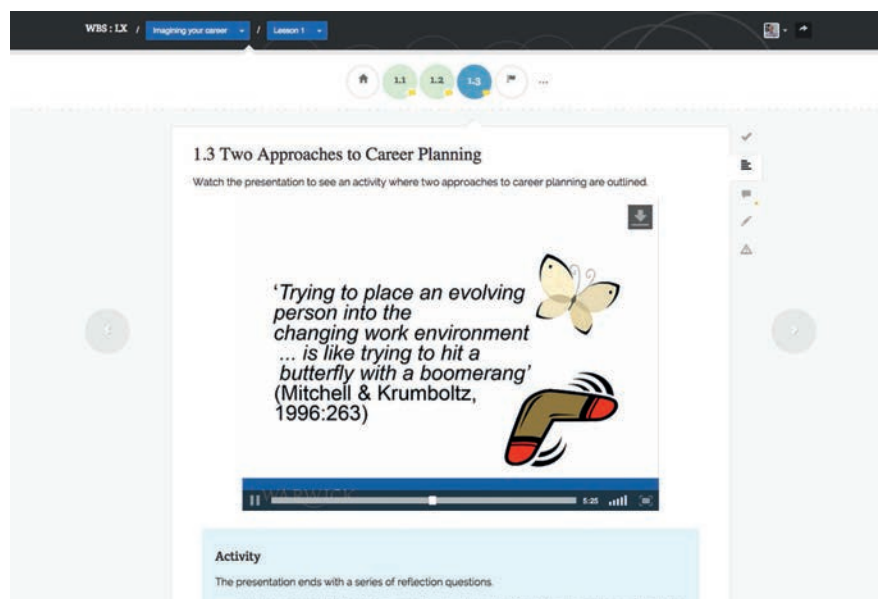
- A collaborative approach was taken to developing and delivering an online Postgraduate Award in Career Development through Warwick Business School (WBS) and the Centre for Lifelong Learning. The programme was designed around the concept of 'Imagining Your Career', and provided careers coaching from the main university Student Careers and Skills team and from the WBS CareersPlus service. The award consisted of a 10 weeks course delivered via an online platform which allowed student engagement to be monitored.

- The programme was designed to be accessible to recent Warwick graduates who were not currently in employment or who were under-employed, i.e. in non-graduate employment, voluntary roles or working part-time and seeking full-time graduate level employment. Because the course delivery was online it provided a distance learning opportunity for those who no longer lived on or near campus, with careers coaching offered via telephone or Skype to ensure all participants had access to this element of the programme.
- The course was intended to achieve several outcomes for these students. It provided an opportunity to work towards a postgraduate qualification which would enhance their employability, give them an increased understanding of how the graduate jobs market operates and how to enhance their position within that marketplace, and raise their awareness of the benefits of further study or research at postgraduate level.

FIGURE 6.1  
Screenshot of the introduction to  
the online Postgraduate Award in  
Career Development

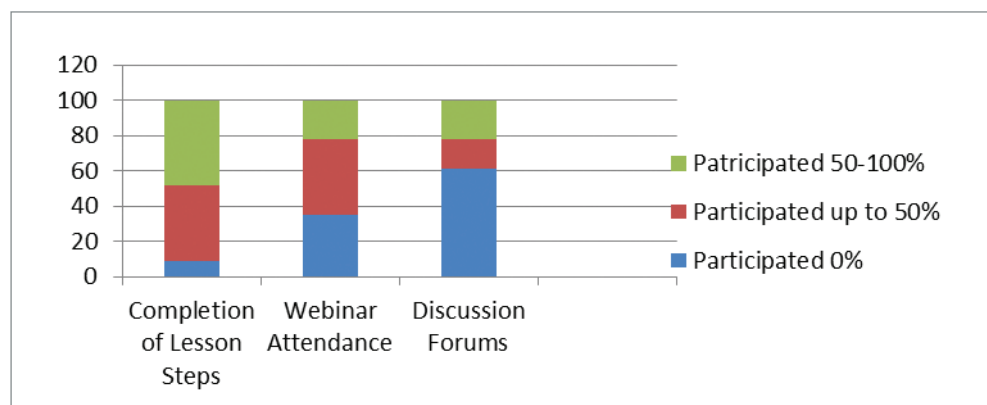


**FIGURE 6.2**  
Screenshot of one of the activities included in the online Postgraduate Award in Career Development



- A total of 23 students enrolled on the course all of whom met the criteria of being either unemployed or underemployed. Examples of underemployment in this context included a Classics graduate working 2 hours per week as a sports coach, a Maths graduate volunteering as a teaching assistant in Africa, and a Biomedical Science graduate working as a part-time photographer's assistant. The majority of students, 61%, were not in employment at the start of the programme.
- Of the 23 who enrolled 22 actively engaged with the online content during the 10 week duration of the course. This included participating in live webinars, commenting on discussion boards, viewing the online lesson content and working through the 48 steps the lessons were broken down into appropriate. See Figure 6.2 above.
- Levels of engagement varied in relation to the completion of the weekly elements of the programme and the other interactive aspects of the course (see Figure 6.3). Initial evaluation suggests that for those learners who were more used to face-to-face teaching and learning, unfamiliarity with online platforms may have presented problems. It was clear, for example, that some individuals had accessed the content of the lesson but had not utilised the function to mark the steps completed. The live webinars were scheduled at various times during the working day and only one student attended all four webinars. This demonstrates the importance of providing alternative timings to facilitate students' different schedules, commitments and learning patterns. Most steps in the course included the opportunity to comment, and some steps included an activity that explicitly asked students to comment on the content of the course. Eight of the 22 students contributed comments with less than 6 comments being the average contribution during the programme.
- In order for their work to be assessed and to receive accreditation students had to complete the course by submitting a portfolio of their work during the summer term. Twelve students (just over 50%) submitted their portfolios and achieved a Postgraduate Award.

**FIGURE 6.3**  
Chart showing percentage of students participating in online content (Source: University of Warwick)





- Positive outcomes were also recorded for the majority of students who did not complete the portfolio, including receiving job offers. Student evaluation indicated that the programme had offered them an opportunity they would not have accessed otherwise and that the experience had been a positive one. Several reported that during the course they had been successful in securing interviews for graduate level jobs and that as a result of learning from the course had been successfully appointed into those roles. This suggests that one of the motivating factors for embarking on the course was to improve their employment prospects but that completion of a Postgraduate Award was not a prerequisite for them to secure employment in their chosen career.

### Returners and Newcomers to Higher Education

2014/15 saw two initiatives designed and piloted by the Centre for Lifelong Learning (CLL) at Warwick, each focusing on the needs of returners and newcomers to higher education. These students were anticipated to be from traditionally defined widening participation groups. Some had not accessed higher education previously, but had extensive experience that would lead them toward postgraduate, rather than undergraduate, level study. Others had completed their undergraduate studies some time ago, but had not considered postgraduate education as an option until now. A number of barriers to participation were foreseen, ranging from external (lack of funds, full time employment, family responsibilities) to internal (lack of confidence, limited knowledge about the benefits of, or opportunities for, postgraduate study).

#### Gateway to Postgraduate Studies

- The 'Warwick Gateway to Postgraduate Studies' is a free taster course of postgraduate level study. This provides a 'low risk' entry point that requires no financial commitment (a major barrier), but which mimics the academic and time requirements (other significant barriers) for typical M-level study.
- Two separate cohorts were recruited to participate in the Gateway to PG course in 2015. The first cohort started with 15 students, and two students dropped out due to work commitments, but planned to join the second cohort in order to complete the programme later in the academic year. The second cohort recruited 12 students.
- In total, 25 students took the first two iterations of the Gateway to PG (discounting withdrawn students). This gives a relatively small data set to draw from, however there are some useful statements that can be teased out. Firstly, the student age was quite well spread – the largest age group was 31-35, and accounted for 28% of the students; the rest were stretched across the age brackets, from 26-30 right up to 61+. In terms of prior qualifications, 80% of students had a first degree and were returning after a break of study. The students were also primarily female (88%).

### Postgraduate Awards Programme

- Recognising that for many adult learners, flexible progression is necessary to fit with the anticipated, and sometimes unanticipated, demands of life, such as employment, care, illness, disability and so forth, the Centre for Lifelong Learning has been designing a modular programme of study for those students who wish to go immediately into accredited PG study. This comprises a suite of stand-alone ten-week postgraduate awards in a range of subject areas that could be taken individually or used to accumulate credit towards a new MA in Interdisciplinary Studies.
- By spring 2015, an initial suite of eight postgraduate awards was available, with additional awards in development.
- These were marketed towards traditional widening participation groups, which are underrepresented in the postgraduate population. To reflect this, the tuition fee for the postgraduate awards was subsidised. Marketing at this stage indicated that student interest would make this a viable programme.
- Given the timescale required for academic development of new programmes, together with those of governance processes, approvals were pending at the close of this project for the final modules that would comprise a full MA. It is not, therefore, possible to report on outcomes. However, the work conducted through this pilot illustrates how important it is to consider lead-in times associated with innovative programmes particularly those that cross disciplinary fields and are directed to a full Master's programme.
- The start date of this course is planned for October 2015.

**Employees in Small to Medium Enterprises:** Postgraduate Award in Innovation Business Leadership (Warwick Manufacturing Group)

- Warwick Manufacturing Group identified that SMEs were under-represented across their programmes and designed their postgraduate Award in Innovation Business Leadership to address the barriers SMEs face in accessing higher education courses. By their nature SMEs find it harder to release staff for extended periods of study, particularly those in leadership positions. This combined with the fees and associated costs of study can impact on participation and retention of students from SMEs who often have no choice but to prioritise business needs over study time, thereby missing taught modules and struggling to catch-up.
- To address these issues this new programme was designed to run as five three day modules over the course of a year, ensuring students spent only short periods away from the workplace. In addition donor funding provided a fee reduction for the course whilst a facilitation fund was made available to aid retention. In consultation with the students supplementary online materials and one-to-one coaching was identified as the best use for the facilitation fund as these would provide reference materials for anyone having to miss taught sessions for business reasons and additional opportunities to reflect on their learning and apply it to their workplace. The latter was viewed as important in demonstrating the benefits of the course and a return on investment to the employer.

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## 6.8 INTEGRATED MASTER'S AS A POSSIBLE SOLUTION TO MASTER'S FUNDING FOR HOME/EU STUDENTS

This element of the project was undertaken by the University of Manchester. An Integrated Master's (IM) degree combines undergraduate and postgraduate study into a 4 year programme with the final year typically being at Master's level. Successful completion of the degree leads to the award of IM, the intermediate Bachelor's award is not made. IM are common in some STEM subjects particularly where they lead to a professionally regulated qualification (e.g. M. Pharmacy, M. Chemistry M. Engineering), where the award of IM confers registered practitioner status or equivalent. IM are awarded using the undergraduate classification system.

Typically students must reach a defined academic standard at the end of year 2 of a Bachelors degree to progress onto the IM. Any student not reaching this standard exits at the end of year 3 with a Bachelors qualification. A small number of students who do reach the required standard exit after year 3 for other reasons (including financial) and would have the option to complete a stand-alone Master's at a later date. Although IM must meet the descriptors for the QAA's qualifications framework at level 7 in full, concerns are sometimes raised that IM do not meet the same academic standards as a stand-alone qualification.

Because the IM is a seamless qualification with the Bachelors degree, the Government's undergraduate loan scheme can be extended to cover the IM, which is not possible for the stand-alone programme. This has increased the popularity of

the IM in recent years and HESA data shows a doubling of student numbers on IM in the past five years. However, IM are not widely recognised outside of the UK and there is a lack of clarity around whether they are compliant with the Bologna process. Other concerns raised in the media surround the attractiveness to students from WP backgrounds and whether it is worth paying for a 4th year of study for a qualification that does not have international recognition.

The project found that traditional IM programmes in STEM subjects continue to flourish, although in Humanities it is likely that students are yet to be convinced of the value of this degree for their career progression.

The principal driver for the increased popularity of IM is the funding model that allows students to gain a Master's qualification using the undergraduate loan system. The proposed postgraduate loan scheme has removed some but not all of this driver; current proposals would require students to take out a second loan. Crucially, this would need to be paid back concurrently with the undergraduate loan, effectively doubling the repayment rate. Paying for the Master's year as part of the single undergraduate loan scheme would get around this problem.

The IM is therefore not a replacement for the standalone Master's, not least because of its lack of recognition outside the UK.

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## 6.9 TOOLKIT FOR PGT PROGRAMME INNOVATION

This element of the project was undertaken by the University of Sheffield. Initially, a survey was undertaken of currently available resources for higher education staff to support the development of innovative PGT programmes. It was found that there were a number of resources that were of value for example Mellors-Bourne et al (2014), but that a comprehensive guide to PGT development was not available.

Following this review, a paper was written by two members of academic staff on the Academic Innovation Sub-Group of the PSS Sheffield Group, outlining a proposed framework for the toolkit. The paper drew on existing practice, relevant research evidence and educational theory.

The approach to the construction of the toolkit adapted the methodology proposed by Conole and Fill (2005) and the following sequence of steps was undertaken:

- (i) The needs of practitioners were identified and the subsequent development of resources was guided by these.
- (ii) Current knowledge of PGT curriculum, pedagogy and assessment best practices were researched and applied in the development of content for the toolkit.
- (iii) Colleagues across institutions were consulted in order to identify best practice case studies.

- (iv) This good practice was embedded within the toolkit.
- (v) Current knowledge in the learning design field informed the development of the toolkit.
- (vi) The facilities of digital technologies were utilised in the development of the toolkit (e.g. videos were created that could complement highlighted approaches and be embedded in the case studies).
- (vii) A prototype toolkit was developed, tested and evaluated with practitioners and the toolkit was revised in the light of feedback.

The development of the toolkit was undertaken by the Project Team in Academic Services at the University of Sheffield, building on the success of the previously developed Toolkit for Learning and Teaching<sup>1</sup>. The Project Team's work was overseen by Sheffield's Academic Innovation Sub-Group that included academic and professional services members of staff, including: Careers; Marketing and Recruitment; Planning and Governance Services. This collaborative approach ensured that the Project Team's work was informed by the needs of a range of stakeholders from the inception of the project.

<sup>1</sup> [www.sheffield.ac.uk/lets/toolkit](http://www.sheffield.ac.uk/lets/toolkit)

## Toolkit Structure

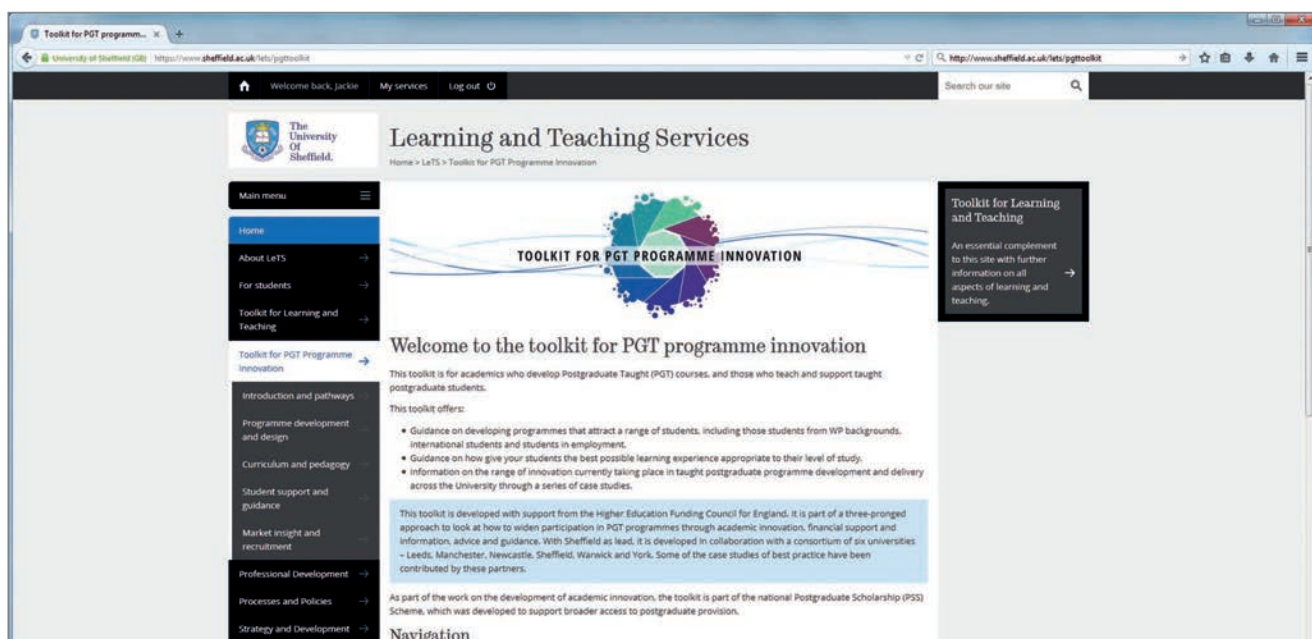
Each section has a similar structure:

- (i) Overview: This introduces the topic and provides overarching guidance.
- (ii) In Practice: This section offers examples of excellent PGT provision, some of which are linked to downloadable pdfs containing case studies.
- (iii) Resources: Users of the toolkit are guided to a range of resources, both internal to the University of Sheffield and external.

Refer to Appendix 2 for a site map overview of the toolkit and it can also be accessed electronically at: [www.postgradsupport.co.uk/research/](http://www.postgradsupport.co.uk/research/).

A copy of the Toolkit's homepage is shown at Figure 6.4 below.

**FIGURE 6.4:**  
Screen shot of Academic Toolkit developed by the University of Sheffield.



## Linked Resources

- Given the toolkit's function as a support for staff development, it provides links to a range of supporting guidance/ documentation for users. The internal links relate to resources developed by a range of professional services at the University of Sheffield, including Marketing and Recruitment and Learning and Teaching Services.
- External resources include materials produced by HEFCE, QAA, HEA and JISC, including materials detailed in Figure 6.5.
- In addition, users of the toolkit are also directed to a range of peer-reviewed papers on learning and teaching in higher education, which can be consulted by those who wish to extend their understanding of the relevant research literature in this field.

### HEFCE

Understanding how people choose to pursue taught postgraduate study

What information do prospective postgraduate taught students need?

### JISC

Improving postgraduate course information

Digital literacies as a postgraduate attribute project

### QAA

Master's degree characteristics

Subject benchmark statements

**FIGURE 6.5:**  
Examples of external resources included in the Toolkit

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## 6.10 CONSORTIUM CASE STUDIES

- The case studies that were used to illustrate best practice were identified through a range of processes led by the University of Sheffield. Initially, a pro-forma was circulated to all departments in the University of Sheffield and partner institutions, which asked colleagues to provide details of innovative PGT practice. Presentations about the toolkit were made to each Faculty Learning and Teaching Committee and Postgraduate Course Directors' meetings, in order to solicit case study information, identify gaps and promote the toolkit. In addition, the Project Team consulted with Learning Development Managers in Learning and Teaching Services in order to identify additional case studies.
- Project Team members contacted academic leads for the case studies and interviewed them in depth about their provision in order to construct case studies. In addition, video interviews were undertaken with a number of the academic leads in order to enhance illustrate selected case studies. Interviews were also conducted with PGT students enrolled in several of the featured courses.
- An example of a case study is offered in Figure 6.6 right.

### Toolkit Summary

- The PGT Innovation Toolkit offers staff in Universities a range of resources that can inform course development and delivery. The Toolkit is an Open Educational Resource for the HE sector as a whole and it is hoped that the toolkit will be promoted through a variety of networks in the years ahead. The University of Sheffield will continue to maintain and update the Toolkit and, in this way, the PSS project will offer a long-term legacy for staff development in higher education in relation to the development of innovative PGT programmes.

Please access the toolkit at:  
[www.sheffield.ac.uk/lets/pgttoolkit](http://www.sheffield.ac.uk/lets/pgttoolkit)

### MSc Data Science, Information School, University of Sheffield.

The Information School wanted to develop a programme in order to respond to societal and business changes in the analysis and use of data. In order to enhance the quality of the course, the School engaged a number of industrial partners in the design and delivery of the programme.

Course leaders approached Peak Indicators Limited, a local business intelligence company, who have helped in shaping the curriculum content and situating the programme to meet industry requirements. The company has also assisted in identifying skills and technologies that students will need to be effective in order to help organisations to utilise data for decision-making and problem-solving.

The relationship with Peak Indicators has been very successful and the company has also have been involved in promoting and marketing the programme, delivery of content, creating industrial case studies, research collaborations, and suggesting potential dissertation projects.

The Information School also hosts an 'Industry Day' which brings representatives from local government, retail and finance into contact with students to share experiences of using data within particular areas. This event gives students insight into real-world data practice and allows them to ask questions and explore job opportunities currently available in Data Science.

In designing a course with these inputs, tutors made inquiry-based learning and the application of knowledge central to the course objectives, which has enhanced student engagement.

FIGURE 6.6:  
Example of a case study



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## 6.11 CONCLUSION

The recent survey undertaken by PA Consulting in 2014 highlighted some of the intellectual and structural obstacles to change and innovation observed by a select group of vice-chancellors, which chime closely with those identified in our project. For instance, it proved impossible to reconcile systems (including decision-making timelines, different quality assurance regimens, different academic calendars, etc). Equally, that the project was unable to devote a funding stream to academic innovation meant that the institutions responded unevenly to the challenge. Not every institution was able to divert internal funding to the project, for example. Finally, the timeline was simply too constricted to allow for the necessary scrutiny of full courses. However, given the sub-Master's nature of the Warwick innovations, that institution was able to 'fast-track' their approval.

- The pilot programmes delivered by The University of Warwick demonstrated that there is latent demand for postgraduate programmes from non-traditional postgraduate student groups and that where the programmes on offer are flexible and designed to meet their learning needs these students are able to make a successful transition to and through postgraduate courses of study.
- The Project notes that academic innovation is a complex issue to address in a consortium arrangement with tight timelines. Institutional inertia needs to be overcome and quality assurance and the necessary academic scrutiny militates against the successful quick implementation of new initiatives. Several elements are necessary for true academic innovation to emerge: sufficient and dedicated funding, a shared vision at the theoretical level even if practical developments differ, academic buy-in and dedicated time by the right academic leaders, and an agreed approach to quality assurance and scrutiny.
- A Toolkit for PGT programme innovation was developed to support innovation that suits the needs and structures of individual universities.



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# Chapter 7 Information, Advice & Guidance, and Employer Engagement

LOUISE BANAHE University of Leeds

& HELEN SYKES University of Leeds

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## 7.1 INTRODUCTION

The objective of the Information, Advice and Guidance (IAG) project strand was to investigate non-financial barriers related to the decision-making processes for entering PGT study. The motivation was the paucity of information on the way in which non-financial interventions can support progression to and within postgraduate study.

Institutions frequently do not have dedicated services (staff or information) aimed solely at PGT students and where PGT information, advice and guidance does exist it is located in different places within different institutions. Compounding these issues is the lack of information or understanding of what a WP student is at PGT level, and also the different needs of a progressor as opposed to a returner. These factors combine to make life difficult for prospective students seeking information, advice and guidance.

The work in this strand involved the following areas of activity:

- Gathering staff and student insight into the process of selecting and entering a Taught Master's course;
- Trialling interventions to support progression into and on Master's study;
- Insight from employers as to what they valued and sought from postgraduate programmes of study.

In addition, partners endeavoured to ensure implementation of the HEFCE guidance '*What information do prospective postgraduate taught students need?*' (HEFCE, 2014).

In this chapter we will describe the activities undertaken by consortium partners and present our findings and recommendations.

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## 7.2 STAFF AND STUDENT INSIGHT INTO IAG

Across the six consortium partners, qualitative research was undertaken with staff and students via insight meetings. The meetings with staff took place during summer 2014, involved academics and staff across a range of functions who support progression into and on from Master's study, including admissions, careers, marketing and student support.

The meetings with students were conducted as close as possible to the start of the 2014 academic year and involved those in receipt of a 2014 HEFCE PSS Scholarship and therefore part of an identified WP cohort in each institution. The aim of these meetings was to reflect on the process and methods used to target IAG at PGT WP students, capture data on how it was delivered, determine its impact, and to identify where there were gaps or challenges in doing this.

Strand leads from each partner summarised the findings of their meetings and then shared them with the other strand leads at strand meetings. The findings of each were compared to those of the other institutions and common themes were seen to emerge, as well as differences which enabled examples of good practice to be identified.

The common themes were as follows:

- The differing motivations for undertaking PGT study were important in understanding the Information, Advice and Guidance needs of prospective students. Whilst many chose to progress to PGT study because it was a stepping stone into a profession, there were others who recognised the value of PGT study in developing knowledge or their social and cultural capital. Some participants reported experiences of underemployment and multiple unsuccessful job applications which had motivated them to contemplate further study. The motivations for study influenced the time at which the participant had considered PGT study. This affected access to IAG and in turn resources used to make an informed decision. Some students questioned how available IAG was (one student participant within the insight meeting discussions described it 'as survival of the fittest') – particularly for those out of education who did not have access to family/ employer/university networks. Other participants stated:

*"...it can seem really intimidating and confusing to get onto a postgraduate degree"*



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*"People who have already done the subject you did in undergrad and then went into a different field are really helpful to talk to and you can find out if it is possible."*

Source: Extracts from feedback sessions

- Within the insight sessions several themes including finance, confidence and other general life commitments were identified as key barriers for prospective WP PGT students, and IAG was identified as an important way to overcome them. Staff often expressed concern about patronising potential PGT students, but students themselves felt that the availability of IAG was scarce and there was an assumption that their having achieved an undergraduate degree meant they would automatically understand what was expected of them at PGT, when in fact this was not always the case.

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- The sessions further revealed that IAG was used to help make decisions both of the 'heart' and 'mind', and its availability via multiple channels was seen as important. Information was widely used but advice and guidance were considered just as important and when available were highly valued. The sources of information employed to help make decisions of the 'mind' included the internet and open days. Prospective students used these sources to consider factors including the value of postgraduate study and which institution to attend. Advice and guidance from university staff, alumni and case studies were sources used to make decisions of the heart. These sources helped address factors such as fitting in, reassurance that the course was appropriate and how to cope with academic study at this level. A major influence in 'seeding' the possibility of postgraduate study was the encouragement of academic staff at undergraduate level. Academic advisers were often cited as a 'major influence' in decision making.
- The sources of IAG used and the questions that prospective students from WP backgrounds had were

Mirroring existing research amongst prospective undergraduate students from disadvantaged backgrounds, the value of sustained engagement to increase confidence, demonstrate understanding and raise aspirations was seen to be ongoing throughout the period of study for postgraduates and not just relevant at the point of application or indeed registration.

seen to be equally applicable to prospective PGT from all backgrounds. However, the combination of economic, social and cultural disadvantage faced by the prospective WP students reinforced the necessity to engage with IAG and the importance of advice and guidance in particular. Mirroring existing research amongst prospective undergraduate students from disadvantaged backgrounds, the value of sustained engagement to increase confidence, demonstrate understanding and raise aspirations was seen to be ongoing throughout the period of study for postgraduates and not just relevant at the point of application or indeed registration. For example, one participant stated:

*"Coming from [participant's previous] ... uni, it's different to a redbrick uni. It is hard, it's very intense. I'm not really sure yet on the support system, but I think it is quite overwhelming actually."*

Source: Extract from feedback session

- An additional theme identified was the need for on-course support particularly where students were upskilling. The feedback from the sessions revealed that there needed to be support for the development of the student's cultural capital, and a comprehensive programme offer of additional support was required. Importance was placed on institutions encouragement of participation in extracurricular activity which was sensitive to WP barriers. Innovative modes of delivery were recognised as key to help those with significant personal commitments (e.g. family and/or paid work) to benefit as far as possible from their PGT study. This could include sign-posting to existing services and the appreciation that PGT students who studied their undergraduate degree elsewhere may not be familiar with the naming conventions for these services. For example, these signposts would include active encouragement to use the careers services, students union, participation in internships, participation in employer networks and study skills support, along with clear articulation of the benefits of these.
- Further there was recognition amongst staff, particularly those in careers services and academic departments, that they could work with employer networks to ensure that the benefits of PGT study were more widely understood by employers, as there were concerns that employers may not always necessarily appreciate the value of PGT.

Our findings lead to the following recommendations:

- Development of specific separate Information, Advice and Guidance strategies, at a national and institutional level, to support progression to postgraduate study from under- represented groups,
- Consideration of the way in which advice and guidance can be accessed, in addition to information, by students who are currently out of education;
- Further research to understand and inform the development of interventions for PGT students from WP backgrounds to address social and cultural capital;
- Further research to understand the relative impact of different types of IAG to support progression, retention and completion.

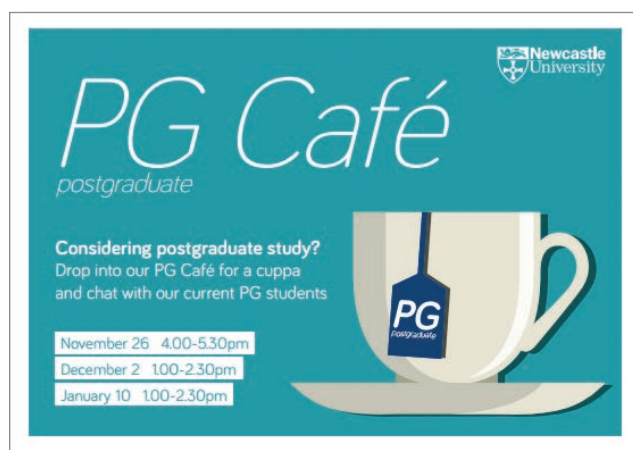
### 7.3 TRIALLING INTERVENTIONS TO SUPPORT PROGRESSION INTO AND ON MASTER'S STUDY

A further area of activity undertaken by the IAG strand was the trialling of WP approaches and interventions widely employed in undergraduate WP outreach programmes and therefore known to be successful in supporting WP

undergraduate access. The interventions were trialled after being suitably adapted for postgraduates. Partners hosted these under the broad 'Master's Taster Session' banner.



FIGURE 7.1:  
Promotional adverts for a Master's Taster Sessions



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The aim of the Master's Taster Sessions was to address the lack of confidence graduates may face in progressing to PGT study by providing the opportunity for them to access specific tailored advice and guidance. Five of the six partners engaged in the Master's Taster Sessions, and each trialled at least one of the following:

- a) Informal networking with current postgraduate taught students/alumni;
- b) A specific subject taster session;
- c) Discussion with an academic member of staff;
- d) Input from University services, e.g. funding, careers, study skills support, accommodation.

A shared template was not implemented for the trials, instead each partner developed its own approach and format. This enabled a broader scope of approaches to be tested but with a consistent intended aim and outcome. Whilst most taster sessions were delivered face-to-face, one partner chose to deliver the sessions online.

The Master's Tasters Sessions included:

- Opportunities to sit in on a lecture related to the subject of interest, followed by an informal chat with an academic and then a current student;
- Day-long drop in session led by the Students' Union, which provided the opportunity to speak to students and support staff representing various services;
- Postgraduate Café events provided the opportunity to find out more about postgraduate study, the university and to meet current students;
- An e-Buddying scheme enabled undergraduates at the institution to engage in an email exchange with a postgraduate studying in the subject area of interest;
- An online taster event included a lecture and question and answer forum with academic and service staff, and PGT students.

In most cases where both an institution's own current students and those currently outside of education were targeted, the collected data on attendance showed that the audience comprised mainly current students and those traditionally considered 'hard to reach' remained absent. Despite a variety of publicity including public engagement being utilised, the vast majority of participants indicated that they had been made aware of the event through the university's website or a direct email/newsletter from the institution. This would indicate that those who attended these events were already familiar with or known to an institution and were currently investigating PGT study either via the web or through having elected to be on a mailing list to receive relevant PGT information. Electronic modes of communication such as webpages, email and social media were therefore either the most successful or the most prevalent (being relatively quick, simple and cost-effective to set up) for promoting these opportunities.

Monitoring figures gathered at these events showed that three of the five institutions which trialled Master's Taster Sessions reached 170 individuals, and the estimated figures from larger-scale events run by the other two participating institutions brought the total attendance count to in excess of eight hundred.

Evaluation of the events showed that the two main reasons cited by participants for attending the taster sessions were to find out more about studying at PGT level and course specific information, both of which involved receiving specific advice on top of any generic information which was readily available. Their third reason for attending was typically related to finding out about funding and finance options. Their reasons showed that their reasons for attending the taster events broadly corresponded to their expressed worries or concerns about undertaking PGT: funding was universally listed in the top three concerns, followed by their ability to manage the level of study, and then fitting in study with their work/life commitments.

Respondents to the evaluation were overwhelmingly positive about the opportunity to meet with academic staff and postgraduate students provided by the Master's Taster Sessions. These events were viewed as non-threatening and participants felt that they had time to discuss their issues and were not competing for attention with other students.

The feedback from participants showed that the events which proved most successful were those which involved a subject-specific element, particularly those with a subject taster element or those which were hosted within a particular school with academic staff and current students present. The more generic events proved less successful in this respect, but participants still found value in taking part. All events trialled had aspects which were highly rated by participants. Further evaluation evidence showed that respondents felt that their worries or concerns had been addressed by attending a Master's Taster Session. Finally, participants, in general, agreed that attending a Master's Taster Session had had a positive impact on them applying for or taking up a place to study a Master's course.

... the events which proved most successful were those which involved a subject-specific element, particularly those with a subject taster element or those which were hosted within a particular school with academic staff and current students present.

Results of our trials, lead us to recommend:

- Development of IAG interventions enabling prospective PGT WP students to engage with staff and existing students in settings outside open days or one-to-one meetings;
- Consideration of the range of potential audiences for PGT study and the use of online capability to engage with prospective students.

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## 7.4 ON-COURSE IAG SUPPORT

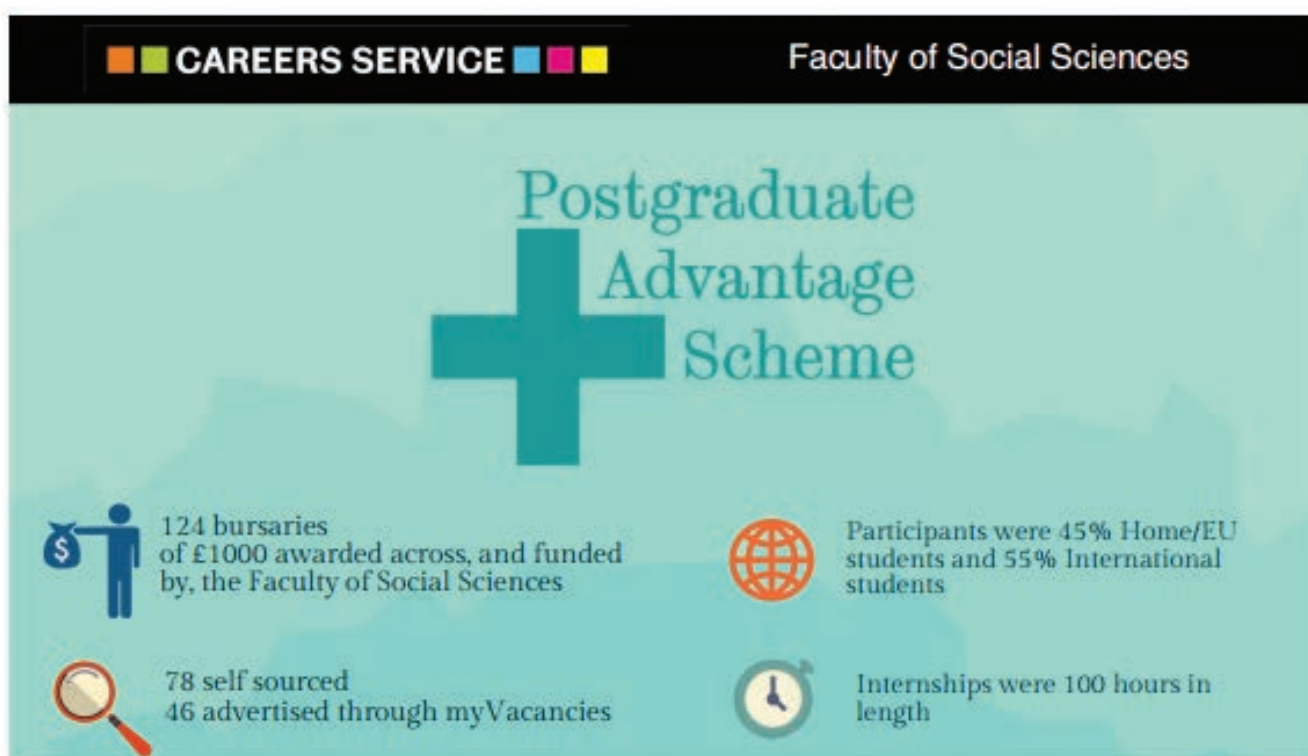
Two institutions trialled on-course interventions, targeted at the identified WP cohort in receipt of the 2014 HEFCE PSS funding. Where appropriate, this was offered as integrated provision with a wider cohort including other postgraduates or undergraduates from under represented backgrounds.

- One institution partnered with internal and external stakeholders to offer a programme of support, comprising study skills sessions, targeted written information/resources, and employability skills workshops.
- The second institution designed a Postgraduate Advantage Scheme (PAS) which offered 100 hour paid work placements for students studying in the faculty of Social Sciences. Students in receipt of the PGT scholarship were part of this group and were able to work with third sector, non-governmental organisations and SMEs. In addition, the scholars were able to participate in activities including mock assessment centres.

Appendix 3 provides a case study example of a participant on the PAS scheme and a copy of the PAS scheme evaluation.

Evaluation of the activities trialled showed that personal contact to establish needs, barriers and outline possible advantages of engagement was beneficial; steps were taken to address barriers where possible and students found the IAG delivered within the sessions both useful and valuable. In addition, students benefitted from the development of relationships with peers and a focus on establishing a sense of belonging at a subject and institutional level.

FIGURE 7.2:  
PAS Promotion



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## 7.5 EMPLOYER ENGAGEMENT INTERVIEWS

A further activity undertaken by this project strand was to engage with employers to find out what they valued and sought from postgraduate programmes of study. A schedule of interview questions were drawn up and each consortium partner used the schedule in face-to-face or telephone interviews. In total fifteen employers undertook the research and the organisation they represented varied in size from SMEs to large multinationals and included pharmaceutical

companies, law firms, creative industries and small charities. The interviews were intended to develop an understanding of employers views on PGT study and determine whether a PGT qualification was desirable for entry into their organisation, whether they supported employees to develop their skills through postgraduate study and also their views on barriers to PGT diversity.



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As would be expected, our findings revealed that employers were looking for employees with a combination of skills, abilities and knowledge which could be developed and enhanced through postgraduate study. Whilst all of the employers reported high numbers of applicants and recruits with postgraduate qualifications there was a noticeable difference in the need for an applicant to possess a PGT qualification within application and selection processes. The responses fell into three categories. Some employers explicitly required a postgraduate qualification and typically this was due to a professional body or industry requirement. The second group stated that that a Master's was a not a requirement however an increasing number of applicants held a postgraduate qualification and inevitably the bar had been raised and study at this level became a distinct benefit. The third group of employers stated that postgraduate study was not a requirement, and undergraduates and postgraduates were considered equally.

From this, we conclude that postgraduate study should increase employability and the range of options in the employment market. It also raises the question of whether or not a disadvantaged student who lacked social or cultural capital would recognise that implicit need for a postgraduate qualification without access to appropriate levels of IAG.

During the interviews, employers made reference to the value of work experience in addition to or sometimes instead of postgraduate study. It was highlighted as a means of developing maturity or soft skills, for example. However, only

a few of those employers interviewed had examples of the way in which they facilitated work experience.

All of the employers felt that job applicants often lacked appropriate skills such as soft skills, work experience undertaken as part of the PGT course, written communication and presentation skills.

Employers explained that career development for their employees tended to be addressed through induction, appraisals or 1-2-1s. The decision making around developing skills and knowledge was often described as collaborative and there appeared to be a tendency towards in-house training rather than learning via additional externally validated qualifications. Employers were prepared to provide some time out for employees to undertake peer to peer learning or sharing. Overall the employers reported limited availability of funding to support employees development and in the main it was restricted to those organisations where postgraduate qualifications were a requirement for the role or profession.

Overall the employers interviewed appeared to have limited understanding of the ways in which disadvantage can create barriers to PGT study and the limitations this placed on both the size and the diversity of the labour market. Larger institutions tended to have a greater understanding of the need and value of diversity amongst their employees. A few of the employees provided examples of strategies they were undertaking to address this issue but none of the examples linked to postgraduate diversity.

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## 7.6 CONCLUSIONS AND RECOMMENDATIONS

### SUMMARY OF FINDINGS

This project has provided us with the opportunity to review and improve our IAG for prospective and on-course PGT students. Our project has shown that WP approaches and interventions widely employed in undergraduate WP outreach programmes can be usefully developed to support WP PGT access.

As a sector we need to further understand that PGT students are not and do not present as a homogenous group. Part-time students, those with caring responsibilities and students who study a Master's straight from UG will all have very different experiences and require different opportunities to enhance their skills, ability and knowledge.

In order to conclude our activity, we have developed a progression framework to share existing approaches and practices to establish an understanding of the elements which are effective in helping maximise progression to, and success in, Master's study for students from under-represented groups. Please refer to Appendix 4 for a copy of the framework.

### RECOMMENDATIONS

- Consideration is given to how students from all backgrounds are shown the benefits and outcomes of postgraduate study through clear signposting to specific services.
- Develop understanding of best practice in Information, Advice and Guidance for prospective students out of education and in employment.
- Sector level and institutional debate to determine how the range and availability of work experience, placements and internships are extended and made accessible to PGT students and in particular those from WP backgrounds.
- Institutions and the sector need to work more closely with employers locally, nationally and internationally to understand labour market trends and develop programmes of study which are responsive to their needs.

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# Chapter 8 Understanding The Student: Consortium Research on PGT Access and Motivations

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## 8.1 INTRODUCTION

The 'Understanding the Student' ('UtS') strand of the project consisted of a series of targeted quantitative and qualitative research activities designed to investigate UK students' motivations and barriers to postgraduate taught (PGT) study. The research also explored potential links with socio-economic and background characteristics of individuals, with the aim of producing evidence-based widening participation characteristics at PGT level.

The strand was led by Newcastle University, working in close collaboration with the academic Project Research Team from the University of York.

The surveys and research undertaken as part of the strand were as follows:

- The Pathways Beyond Graduation survey: A quantitative survey of UK-domiciled first-degree graduates from the six partner universities from the 2009 and 2012 graduating cohorts (n = 2,849).
- Applicant and Registration Data ('Admissions Study'): A quantitative analysis of UK domiciled applicants to postgraduate taught study for the 2013/14 and 2014/15 applications cycles for the six consortium universities (n = 42,888).
- The Pathways to Postgraduate Study survey: A quantitative survey of UK-domiciled Postgraduate Taught students from the six partner universities who commenced their studies in the academic years 2013/14 and 2014/15 (n = 3,334).

The three above-mentioned surveys are analysed in more detail in a separate report.

- Alumni Qualitative Research ('CRAC study'): The qualitative research was designed to complement and add value to the quantitative alumni survey by gaining in-depth perspectives in relation to access and progression to PGT study. This element was delivered by the Careers Research and Advisory Centre (CRAC), who were commissioned to conduct semi-structured interviews with 80 UK-domiciled first-degree graduates from the six partner institutions from the 2009 and 2012 graduating

cohorts. The full findings for the qualitative research are presented in the report Recent Graduates' Perspectives on Access and Progression to Taught Postgraduate Study available at [www.postgradsupport.co.uk/research/](http://www.postgradsupport.co.uk/research/).

- Futuretrack Data Analysis: This data analysis was undertaken in order to investigate national trends against which the information gathered for the Consortium partners could be compared. The Futuretrack dataset is a longitudinal survey of the UCAS 2005/06 applicant population run by the Institute for Employment Research (IER), based at the University of Warwick. IER were commissioned to conduct quantitative data analysis. With a focus on Waves II (2007) and IV (2011/12) of the longitudinal study, an investigation was undertaken of early intentions for and actual progression to postgraduate study (n = 9,743). Results were presented by grouping universities in the following ways: pre 1992; post 1992; by region; consortium universities; and the local post 1992 comparator institutions for the partner HEIs. The full findings of this analysis are presented in a separate report available at: [www.postgradsupport.co.uk/research/](http://www.postgradsupport.co.uk/research/).

The key findings from all the research undertaken as part of the Understanding the Student strand are presented in the following executive summary and themed report produced by the University of York Project Research Team. The research offers some key advances for understanding access to postgraduate study for UK-domiciled first-degree students and the place of postgraduate study in graduates' early careers, bringing together a range of different datasets and research techniques to provide a holistic view of the topic. This includes: quantitative patterns of applicant and enrolment; take-up of postgraduate study in the context of early labour market experiences; comparison of national and local patterns; investigation of the association between background characteristics and postgraduate study; and the biographical and personal circumstances in which decisions are made. The UtS strand includes new data items and datasets which have not been collected previously, including applicant microdata, and details of postgraduates' parental education, funding sources and debt.



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The following points should be noted when reading the research finding:

- The datasets are 'cross-sectional rather than longitudinal (with the exception of Futuretrack). This means that it is difficult to be certain how much changes across cohorts represent consistent changes over time, which we would expect to see with other cohorts, and how much they are due to the peculiar circumstances which might affect particular cohorts (such as economic recession, changes to student finance etc).
- While we have attained quite large sample sizes, it should be noted that for all the surveys, including Futuretrack, nonresponse and sample attrition are endemic. Further detail of the nature of the samples and actions taking to mitigate nonresponse are set out in the relevant reports.
- The first students to attend university in England under the post-Browne Review £9,000 undergraduate tuition fee regime did not complete until summer 2015, and are therefore not part of the UTS strand research.

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## 8.2 UTS STRAND TEAM

The UTS strand involved collaboration both within and outside the Consortium.

Newcastle University:

- Strand Lead - Anne Coxhead, Head of Marketing and Publicity
- Deputy Lead - Bev Ferguson, PG Marketing Manager
- Strand Project Manager Clare McKeague, Project Manager

University of York Project Research Team:

- Strand Research Lead – Dr Paul Wakeling, Department of Education, University of York
- Project Researcher – Dr Sally Hancock, Department of Education, University of York
- Project Researcher – Professor Gillian Hampden-Thompson, University of Sussex – formerly Department of Education, University of York

Warwick Institute for Employment Research – Professor Kate Purcell and Ritva Ellison

Careers Research and Advisory Centre (CRAC) – Dr Robin Mellors-Bourne

All interpretations of this research are the chapter authors' alone.

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## 8.3 SUMMARY OF FINDINGS

We saw a broad similarity of outcomes across consortium institutions, noting that inter-institutional differences are most likely to be between different kinds of university. In this regard, getting in to a research-intensive, selective university as an undergraduate may be more important than other factors in getting on to a postgraduate programme subsequently, since some of the patterns observed did not differ markedly for those from different backgrounds. In particular, academic attainment was a very strong predictor of postgraduate access. That said, we did see social class, gender and ethnic differences in offer rates and in overall rates of transition to taught postgraduate Master's programmes across the different sources of data. We also saw that the consortium institutions' postgraduate student body comprised relatively few graduates of post-1992 universities. Apparent inequalities in access do not seem to be due to differential aspiration, because those from minority ethnic groups and disadvantaged socio-economic groups were most likely to intend to enrol on a taught postgraduate Master's degree, but least likely to realise that intention.

Qualitative evidence suggested that undergraduates' intentions articulated for Master's study early in their course were quite vague as in interview most admitted to only seriously considering further study after graduation. Obtaining suitable employment was the principal motivation, but intrinsic interest also featured. There were a number of findings pointing to graduates using the taught postgraduate Master's as a form of 'repair' for wrong choices and career dead ends at an earlier stage, pointing to a need for improved IAG both prior to and during undergraduate study. This could include the kinds of activities being run through the Consortium's IAG strand. Others were 'trading up', sometimes to mitigate their perception that their undergraduate qualification was not sufficiently valued in the labour market, but sometimes for more positive reasons to advance their career within their chosen field more rapidly. We certainly did not find evidence that proceeding to a taught postgraduate Master's is a linear process for most graduates.

Looking at finance and funding, cost not debt featured most prominently. While some were clear that their existing debt was a deterrent, a much larger group saw upfront cost and the lack of sources of funding as more of a barrier. There were some indications that very high debts proved a barrier for disadvantaged groups. We saw relatively little difference in current postgraduates' source of funding by social class background, but obviously those without funding do not appear in the postgraduate dataset to begin with. This suggests that there is a need for continued scholarship support, along the lines of the PSS awards offered in this and other projects, in order that those with high academic ability who lack their own or familial financial resources can be supported through Master's study.

There were some indications that very high debts proved a barrier for disadvantaged groups. This suggests that there is a need for continued scholarship support, along the lines of the PSS awards offered in this and other projects, in order that those with high academic ability who lack their own or familial financial resources can be supported through Master's study.

There are benefits in the graduate labour market for Master's graduates, although they are not – at least not yet – principally related to salary. For some, our evidence points to successful

'repair', with levels of 'graduate job' equal to those with first degrees only; for nearly all Master's graduates, the type of work they end up with seems to be relatively highly skilled.

### GOOD ADVICE<sup>a</sup> + ATTAINMENT<sup>b</sup> + FUNDING<sup>c</sup> = ENTRY TO POSTGRADUATE STUDY

In very simple terms, our evidence from across the studies suggests that, for those that want it:

Inequalities of ethnicity, social class and gender appear in postgraduate transitions. We anticipate that these inequalities are introduced largely through inequalities in parts (a) and (b) of the above equation, but with some effect of social class on part (c). There remains a possibility that there is unfairness in the postgraduate admissions process but we lack the data to determine this. We should also note the considerable heterogeneity and complexity seen in our findings. Working with the PSS scholarship holders and reviewing the detailed qualitative evidence from CRAC reminds us to be aware of the difficult individual circumstances which could otherwise get 'lost in the cracks' of broader conclusions.

We suggest that in thinking about widening participation at postgraduate level we should distinguish between different stages of the process. Prior to the point of enrolment, certain background characteristics can be used as widening participation measures, but to enable enrolment of those with an offer of a postgraduate place, financial means (e.g. household income) should be assessed.

## 8.4 OVERALL PATTERNS

### *Institutional patterns*

Prior to conducting the research, we anticipated that there might be important differences between the six universities in the Consortium when it came to patterns of progression to postgraduate study. They vary in size, with postgraduate numbers ranging from under 5,000 to over 10,000 and in terms of geography - span the North West, the North East and the West Midlands of England. Four of the institutions are based in medium to large cities, while two are campus universities. While it is important to note the distinctive characteristics of the participating institutions, what emerged as being more significant was their similarities. We found few noteworthy differences concerning patterns of progression to postgraduate study or the main characteristics of their postgraduate students. To some extent this confirms the observation by Wakeling and Hampden-Thompson (2013) that differences between types of universities seem to be particularly important in understanding postgraduate transitions. Accordingly, in this chapter, we do not distinguish between the universities in presenting our findings, but rather give results for the Consortium as a whole.

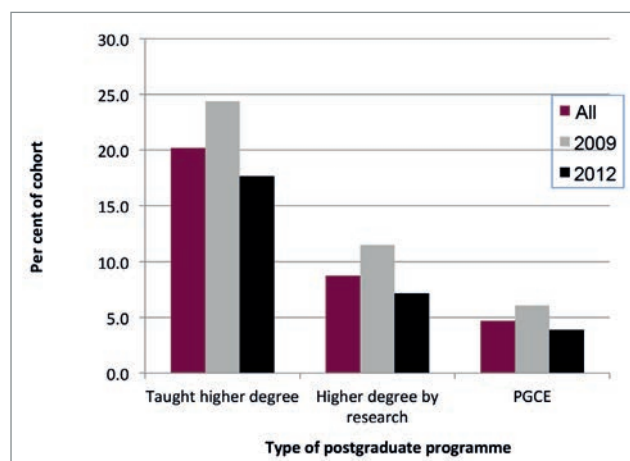
### *Rate of progression to postgraduate study*

Within the Pathways Beyond Graduation survey, we found about 35% of 2012 first-degree alumni and 47% of 2009 alumni reported they were currently enrolled on or had previously completed a postgraduate course. This is likely to be an overestimate, since we know from recent HESA Destinations of Leavers from Higher Education (DLHE) survey returns that the initial rate of progression to postgraduate study is about 20% for the Consortium universities.<sup>1</sup> The HESA DLHE rate reports progression after six months, whereas our data are for graduates of two and five years' standing respectively. However other sources,<sup>2</sup> suggest that transition is unlikely to have doubled within that timeframe. Within the Futuretrack study, around 18% of graduates had entered Master's study by the Wave IV survey, about one-to-two years after graduation; 80% of those entering a Master's degree had done so immediately. We can conjecture that graduates with some postgraduate study experience were more likely to be interested in and hence complete our survey.

<sup>1</sup> Source: first author's re-analysis of data from Wakeling and Hampden-Thompson (2013) Transition to higher degrees across the UK: an analysis of regional, institutional and individual differences. York: Higher Education Academy.

<sup>2</sup> E.g. HEFCE (2013a) Postgraduate education in England and Northern Ireland: Overview Report 2013. Bristol: HEFCE.

We saw few differences across broad subject areas in terms of progression to postgraduate study within the Pathways Beyond Graduation dataset. Using the broad subject categorisation developed by Futuretrack, we found graduates in STEM and non-STEM academically-focussed subjects were most likely to have some postgraduate study experience, with those in 'LEM' (Law, Economics and Management) least likely, but the differences were not substantial. This was a somewhat different order than seen in the Futuretrack study, where academically-focussed non-STEM subjects had the highest rate of progression and vocationally-focussed subjects the lowest. Using the Futuretrack dataset we are also able to identify by subject discipline those first-degree graduates most likely to have entered a taught postgraduate Master's degree despite no stated intention to do so. This was most common for graduates in Languages (including English) and Historical & Philosophical Studies where 11% and 14% of the respective cohorts fell into this category. Graduates in these disciplines were also the most likely to be underemployed, perhaps compensating for a disappointing graduate labour market outcome.



**FIGURE 8.1:** Progression to postgraduate study by type of postgraduate programme and graduating cohort, (Pathways Beyond Graduation survey).



### Characteristics of postgraduate students

Table 8.1 sets out some of the key characteristics of our sample of current postgraduate students at the Consortium universities. Much of this is new data not available elsewhere, including via HESA.

Just under two-fifths of the respondents to the Pathways to Postgraduate Study survey had completed their first degree at a Consortium university. In each case, a university's own alumni was the most common single source of postgraduates, although in no institution did they constitute a majority. In all except one of the universities, the neighbouring post-1992 university was the second most common source of postgraduates, although typically accounting for only 5-10% of the total. There was a wide range of other institutions represented, but with a preponderance of northern pre-1992

institutions. Three quarters of the postgraduate respondents had completed their first degree within the previous decade. Students with good degrees (upper second-class honours or better) represented the large majority of postgraduates, with those obtaining lower second-class honours being enrolled relatively more frequently on a PGCE programme.

Looking at the socio-economic background characteristics of the taught postgraduate respondents, we can see that they represent a relatively advantaged group, albeit not substantially different to the profile of first-degree graduates from the consortium universities. The POLAR3 geodemographic data shows that there are more postgraduates from high than low participation neighbourhoods, although the differences are perhaps not as marked as might be expected.

Characteristic	% of respondents
Undergraduate institution - within consortium	38.8
First-degree completed 2006 or later	74.1
<i>Undergraduate degree classification</i>	
First class honours	29.1
Upper second class honours	55.6
Lower second class honours	11.3
Third class honours	0.5
<i>Type of secondary school attended</i>	
Non-selective state school	72.2
Selective state school	11.5
Independent school	14.2
<i>POLAR3 quintile (postcode prior to undergraduate study)</i>	
1. Mean young participation rate – 16.1%	11.8
2. Mean young participation rate – 25.0%	15.8
3. Mean young participation rate – 32.8%	17.7
4. Mean young participation rate – 41.8%	22.7
5. Mean young participation rate – 57.6%	32.0
<i>Parental higher education</i>	
2+ parents attended higher education	42.6
1 parent attended higher education	21.5
No parents attended higher education	36.0
<i>Parental NS-SEC (three-class version)</i>	
Managerial, administrative and professional occupations	59.9
Intermediate occupations	22.5
Routine and manual occupations	9.4
Never worked and long-term unemployed	8.2

TABLE 8.1:  
Consortium UK-domiciled  
taught postgraduate student  
characteristics (Pathways to  
Postgraduate Study)



### Application to enrolment

Figure 8.2 shows the overall pattern of applications to offers to enrolments. Here we can see that around 60% of taught postgraduate applications resulted in the offer of a place, with 60% of offers resulting in the applicant enrolling as a

postgraduate student. These ratios varied across type of programme, with Master's applications most likely, and PGCE applications least likely to result in an offer. Conditional on receiving an offer, Master's applicants were less likely than PGCE applicants subsequently to enrol.

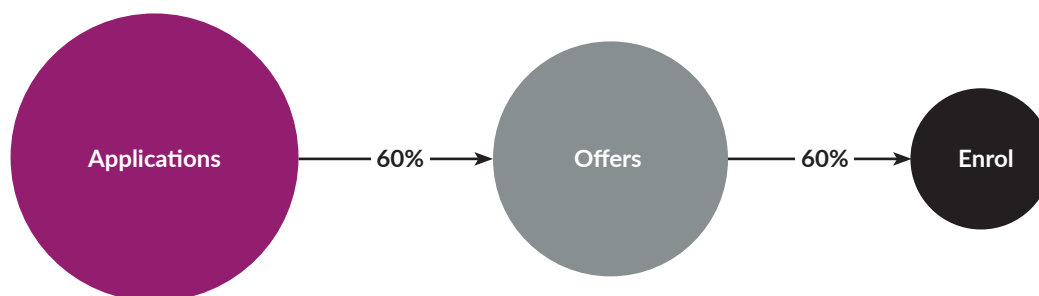
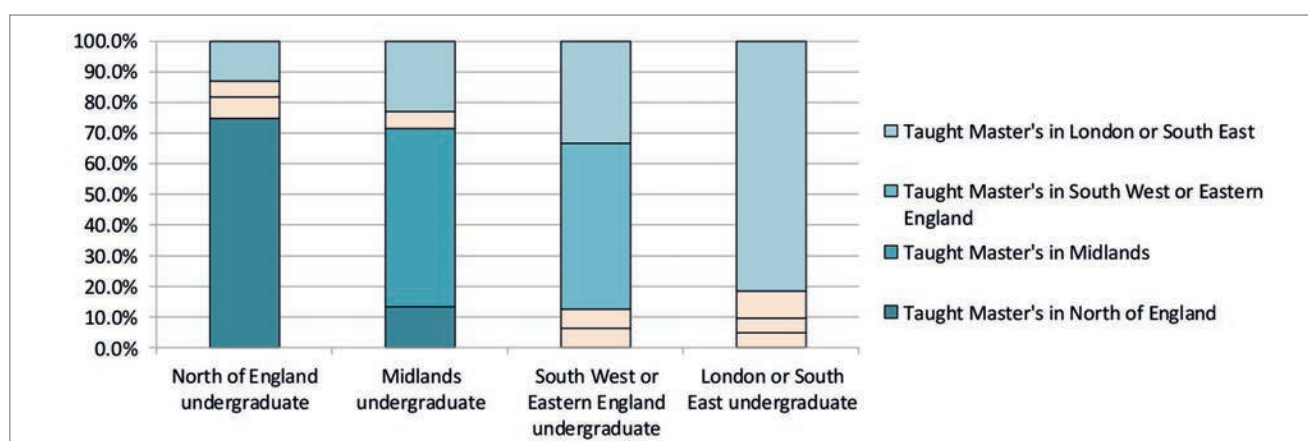


FIGURE 8.2: Ratio of applications to offers to enrolments (Admissions Study)

### Geographical mobility

Noting that our Consortium is based in the northern half of England, we asked for analysis of national patterns of mobility for postgraduate study from the Futuretrack study. These are presented in Figure 8.3, which shows the movement around England of first-degree graduates who proceeded to a taught Master's degree. The patterns for graduates from the North of England broadly reflect what we noted in our Pathways Beyond Graduation and Pathways

to Postgraduate Study surveys, namely that students mostly stay within the region for their Master's study. Around one in eight moves to London or the South East, the region which is also the most successful in retaining its graduates who enter a Master's degree. This is consistent other research<sup>3</sup> which found that London benefits from 'brain gain' at postgraduate level. By way of contrast, graduates from the Midlands region (which includes the University of Warwick) and the South West and Eastern regions are considerably more likely to move out of the region for a Master's degree.



Notes: Futuretrack Wave IV respondents, UK domiciled graduates, undergraduate study in England, excl. Medicine and Dentistry, excl. Colleges and Specialist HEIs, engaged in Taught Master's study, TM study location known, N=1,170. NB Light orange cell colour indicates 10<N<30.

FIGURE 8.3: Broad geographical mobility of taught Master's students in England (source: Ellison and Purcell, 2015)

The Futuretrack study notes that graduates from 'lower tariff' (i.e. less academically selective) institutions who have high first-degree attainment rarely move region if progressing to a taught Master's degree. They speculate that this may be due to limited advice and guidance on the most suitable postgraduate course. It could, however be as

a result of material constraints, since graduates from these institutions are more likely to be from lower socio-economic groups. Evidence from undergraduate widening participation research shows disadvantaged students are more likely to report both financial and emotional ties to their locality.

<sup>3</sup> Wakeling, P. and Hampden-Thompson, G. (2013), op. cit.

## 8.5 MOTIVATIONS

### Prior intentions

The Futuretrack dataset gives us some insight into undergraduates' intentions to undertake postgraduate study at a later point. During Wave II (2007) of the Futuretrack study which was conducted when participants were towards the end of their first year of undergraduate study, around 35% expressed the intention to take a taught postgraduate Master's qualification, around one in eight intended to undertake a PGCE and about the same proportion were thinking about another kind of postgraduate course. A few were considering postgraduate study abroad (Ellison and Purcell, 2015).

HEFCE's Intentions After Graduation Survey (IAGS), conducted in 2013 and again in 2014 and linked to the National Student Survey, found that between 14% and 16% of young undergraduate final year students planned to progress to postgraduate study.<sup>4</sup> For both Futuretrack and IAGS, we can compare intentions to realisation (see the 'Barriers' section, later).

By way of contrast, in the qualitative interviews conducted by CRAC, very few graduates reported any serious consideration of taught postgraduate study prior to graduation, and where they did it was in the context of several other options, perhaps as a fall-back if employment plans did not come to rapid fruition. Some mentioned that they saw a postgraduate qualification as a form of distinction, setting them apart from their peers in a crowded graduate labour market. As a general observation, however,

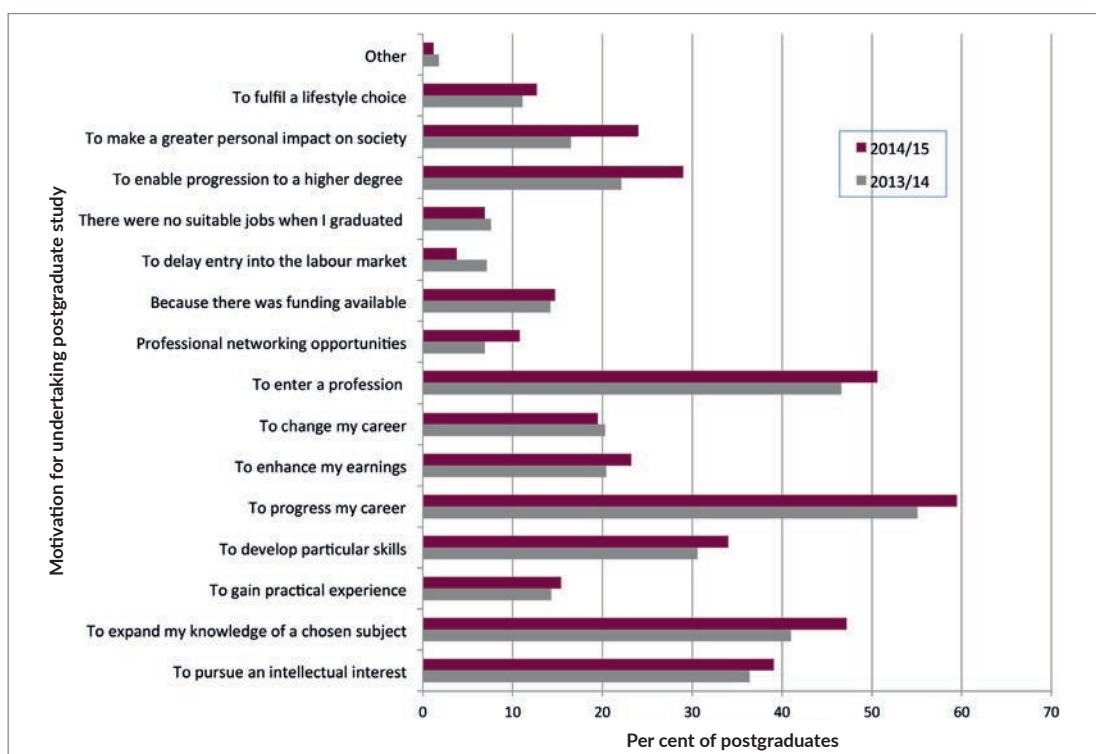
CRAC noted considerable heterogeneity in the reasons why interviewees opted for – or indeed opted out of – postgraduate study.

Two further interesting observations about intentions emerge from Wave II of Futuretrack. First, particular groups of students were more likely to intend to study a taught postgraduate Master's degree. Prominent among these were low-achieving students in pre-1992 universities; and high-achieving students in post-1992 universities. We consider below whether Master's study is a form of 'repair' or alternatively represents 'trading up'. Secondly, some two-fifths of those who had completed a taught Master's by Futuretrack Wave IV (2011/12) had not expressed a prior intention to do so at Wave II. We consider the characteristics of this group in more detail in the 'Barriers' section.

### Reasons for postgraduate study

The reasons given by respondents to the Pathways to Postgraduate Study survey for undertaking taught postgraduate study are shown in Figure 8.4. They do not substantially differ from those given by respondents to the Pathways to Postgraduate Study survey nor as is evident from the figure, do they differ markedly between the two cohorts we studied. In addition, alumni who had not yet entered a postgraduate course but aspired to do so exhibited similar responses and Futuretrack Wave IV respondents' results also matched closely, using slightly different response categories.

FIGURE 8.4:  
Motivation for  
enrolling in  
postgraduate  
study (Pathways  
to Postgraduate  
Study survey)



<sup>4</sup> See: [www.hefce.ac.uk/analysis/Overview/Intentions/](http://www.hefce.ac.uk/analysis/Overview/Intentions/)



Respondents cited motivations to do with the career and earnings related benefits of postgraduate study, as well as interest in it for its own sake. Career progression features prominently, being the top most-cited reason for postgraduate study, followed by entry to a particular profession. However, interest in the subject matter covered in postgraduate study is more frequently listed by our respondents than earnings. Here we should note that our PSS scholars seemed particularly likely to be motivated by interest in their subject and many were looking to progress to a research degree in future. This lends some credence to the British Academy's<sup>5</sup> 'broken bridge' argument – that disadvantaged graduates are unable to access PhD funding because they need to acquire a Master's degree to access it and cannot afford to. It is also notable that the reasons cited are largely positive ones. If graduates were primarily using postgraduate study to continue a student lifestyle or because of the lack of attractive alternatives, these were not reasons that were stated in their survey responses.

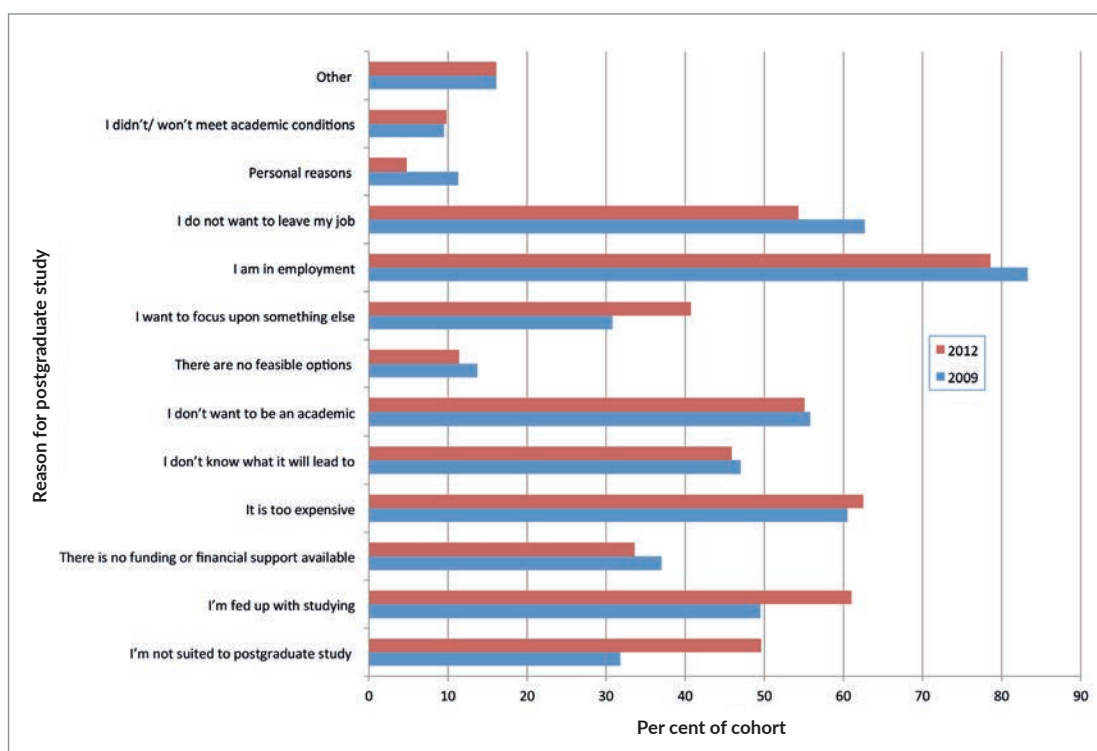
The qualitative data presents an alternative perspective. In contrast to the positive rationales articulated by survey respondents, a distinct impression from the CRAC study is of fairly vague plans for postgraduate study, which crystallise only just prior to or after graduation as the reality of the graduate labour market becomes apparent. However the

overriding message is "the sheer heterogeneity of...personal contexts and career decision-making strategies" (CRAC study, p. 19). Nevertheless, the CRAC research identifies four different motivational trajectories to postgraduate study:

1. A long-held intention, from early undergraduate study or before (relatively unusual);
2. Not knowing what else to do;
3. Having an idea for a career but being unable to find a suitable – or indeed any – job;
4. Being in a career and wishing either to change track or to accelerate progression on the current track.

Qualitative data from Futuretrack supports this typology to some extent, with graduates mentioning postponement of career decisions and change of direction as motivations for their enrolment in taught postgraduate study. Some explicitly mention that they are seeking to distinguish themselves in a crowded labour market. We pick up this theme in the next section. We also need to bear in mind the effect of the prevailing macroeconomic conditions encountered by our graduate respondents across the different research studies. Their need for finding an alternative or taking a temporary position may have been greater than is the case for cohorts graduating in more favourable times.

**FIGURE 8.5:**  
Reasons for  
not enrolling in  
postgraduate  
study (Pathways  
Beyond  
Graduation  
survey)



Overall though, our motivation data across the datasets show that postgraduate transitions can often be non-linear. They certainly underline the folly of viewing transition to

postgraduate study as taking place immediately after a first-degree and as the result of a logically and rationally-planned process on the part of graduates.

<sup>5</sup> The British Academy (2012). Postgraduate Funding: the Neglected Dimension. London: The British Academy.

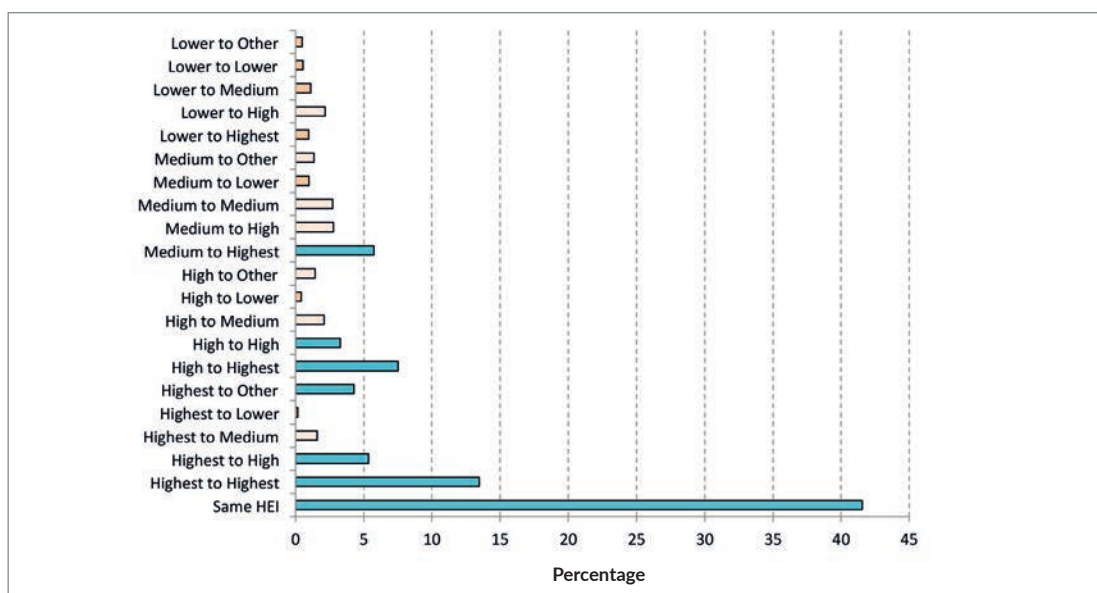
In the Pathways Beyond Graduation survey we asked graduates who had not begun a postgraduate course and did not intend to in future to tell us why. Their responses are given in Figure 8.5. Some are to be expected, including the top answer of being in employment; the CRAC study found most graduates who did not intend to progress to postgraduate study simply planned to do something else (e.g. get a job). Other reasons given suggest a deficit of information, advice and guidance. More than half stated that they “do not want to be an academic”. Of course we cannot be sure that they would have spontaneously given this response to an open question, but the frequency of this response suggests there is work to be done in explaining the purpose of postgraduate study. Only research degrees could be considered direct preparation for an academic career, and even then we know that a minority of doctoral graduates enter academia. Of similar concern is that roughly half of the respondents stated that they do not know “what [postgraduate study] will lead to”, again pointing to a requirement for further information, advice and guidance. We should not be surprised that many are simply “fed up with studying”. Many are evidently dissuaded by the cost of study – three-fifths state that it is “too expensive” although only two-fifths suggest that the absence of funding is a barrier. This hints that some could potentially afford it, but do not consider the expense to be worth it. This may reflect an uncertainty among some graduates as to the labour market value of Master’s degrees and other postgraduate qualifications.

### ‘Trading up’?

The research evidence gives some indication that graduates are using taught postgraduate Master’s study as a means of ‘repairing’ a perceived deficiency in their undergraduate qualification or of augmenting the distinctiveness of their credentials. Much of this relates to signals of status, such as compensating for a disappointing degree classification in the first degree, or seeking to move to an institution with a higher perceived status at postgraduate level. However, it also includes graduates who feel underemployed and want to use postgraduate study as an opportunity to change career direction, as well as those who think they chose the wrong first-degree subject.

Arguably, alumni from the Consortium universities would perceive their first degree as already having high status. This seems to be reflected in patterns of movement: we find only very minor evidence of graduates moving to ‘golden triangle’ universities in the Pathways Beyond Graduation survey, for instance. However we know from previous research<sup>6</sup> that there is a ‘brain gain’ to the Russell Group, as well as geographically to London. Futuretrack data (Figure 8.6) shows that, apart from remaining in the same institution, the most common moves between first-degree and Master’s level are up the status hierarchy. Assigning institutions to groups according to their selectivity at undergraduate level, moving ‘up’ is much more common than moving ‘down’. Those who move region for Master’s study are frequently moving to a higher tariff institutions.

**FIGURE 8.6:**  
Change of HE  
institution type  
(or staying at the  
same institution)  
for Taught  
Master’s study  
(Futuretrack)



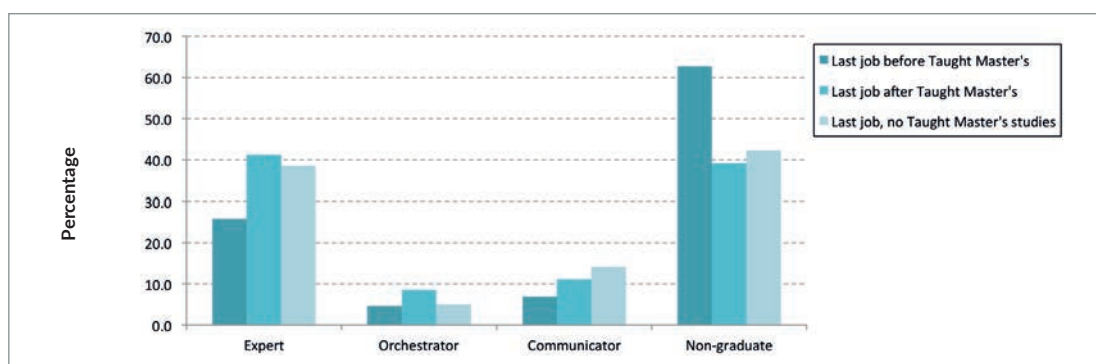
Futuretrack Wave IV respondents, UK domiciled graduates, undergraduate study in England, excl. Medicine and Dentistry, excl. Colleges and Specialist HEIs, Taught Master’s study, N=1,336. NB Light orange cell colour indicates 10<N<30, orange cell colour indicates 3<N<11, dark orange cell colour indicates 0<N<4.

Futuretrack findings also point to Master’s study being effective for easing frustrated graduate ambition. Comparing

the kinds of jobs held by those completing a Master’s degree before and after study, Figure 8.7 shows that the profile of positions changes from one dominated by non-graduate roles (before) to one very similar to that of graduates who have not taken a taught Master’s (after). There were very similar findings from the Pathways Beyond Graduation and Pathways to Postgraduate Study surveys, where only 30% of postgraduate students reported that their most recent job had been graduate-level.

<sup>6</sup> Wakeling and Hampden-Thompson (2013), op. cit.

**FIGURE 8.7:**  
Last job before  
and after Taught  
Master's study and  
when no Taught  
Master's study  
(Futuretrack)



Qualitative evidence from CRAC further corroborates these conclusions. Graduates' reported considering taught postgraduate study because they had not found employment in the direction they sought (and in some cases to compensate for a weak undergraduate degree grade) or after unsatisfactory early experiences or realisation that the sector they had entered was not for them. This partly reflected that many who had not had a career plan prior to graduation had entered relatively low-level employment. (CRAC study, p. 2)

Futuretrack evidence shows that students with lower attainment at first-degree level are more likely to switch subject discipline for their taught Master's degree than high attainers. This may indicate that the lower attaining group are seeking 'repair' of their first degree, whereas higher attainers are looking to advance within their chosen field, perhaps into an academic career.

## 8.6 BARRIERS

### Intention

We can investigate barriers by comparing intentions with actual outcomes. There was a decline in stated intention to pursue a taught postgraduate Master's between Futuretrack Waves II and III. By their final year of study, only about 20% of Futuretrack respondents planned a Master's degree, down from 35% among first-year undergraduates. By Wave IV, only half of those who had planned a Master's had actually realised that intention. HEFCE's Intentions After Graduation Survey gives similar findings, with only about 60% of those intending Master's study near the end of their

first degree having realised that intention approximately six months after graduation. We can conjecture that the decline is a result of fairly vague original intentions becoming more specific. CRAC's interviews with graduates supports this interpretation as very few had seriously considered a postgraduate Master's degree prior to graduation. As noted above, it was typically considered after graduation. We should also note that the decline in stated intention to enter postgraduate study across time could be related to the form of the question asked. Within Futuretrack this became more specific across Waves II, III and IV – from a broad intention, to a specific intention to an actual outcome.

**TABLE 8.2:**  
Intention for  
taught Master's  
study vs. outcome  
by socio-economic  
class background

Social class background (NS-SEC 3-class scheme)	Taught postgraduate Master's study: intention and outcome			
	Realised intention	Did not realise intention	No intention but entered further study	No intention and no further study
Managerial and professional occupations	7.9%	26.7%	5.9%	59.5%
Intermediate occupations	6.1%	28.2%	4.0%	61.6%
Routine and manual occupations	6.1%	31.9%	3.9%	58.2%

Futuretrack Wave IV respondents, UK domiciled graduates, undergraduate study in England, excl. Medicine and Dentistry, excl. Colleges and Specialist HEIs, full-time student at Wave II, N=4,988.

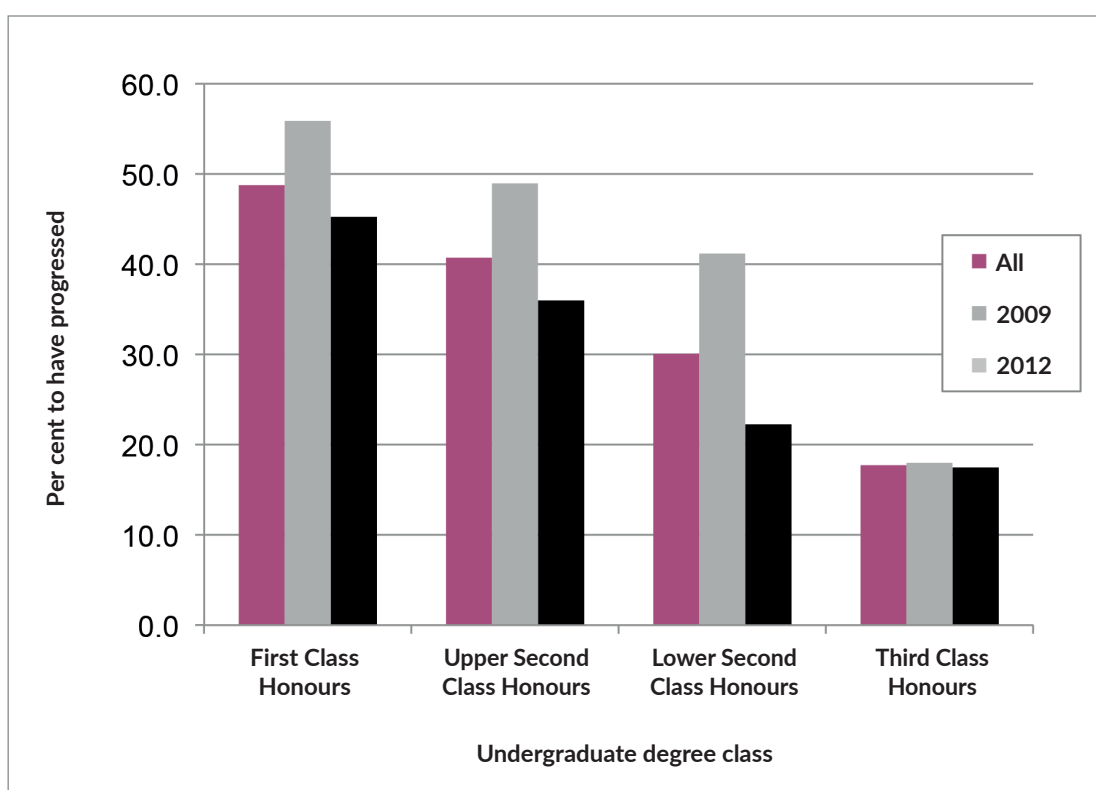
The reasons declared for not participating in taught postgraduate study showed consistency across the various data sources, and were partly about disposition and partly about being in employment instead. However these are general reasons cited for those not intending to enter a taught postgraduate course. It is more difficult to identify barriers for those who intended but were unable to enter taught postgraduate study. Within the Pathways Beyond Graduation survey we identified a small number of respondents (156) who had applied for, but not entered postgraduate study. Just under half of that group had not received an offer. We do not have data on the reasons why those with an offer did not take it up. We do not know whether those who had not applied had been dissuaded from applying in the first place (e.g. by lack of funding), despite holding postgraduate ambitions. However we do know from the Pathways Beyond Graduation survey that around half of those who had not undertaken any postgraduate study would consider doing so in the future.

We can, however, compare the characteristics of those who realised and did not realise their intention to take a taught postgraduate Master's degree. Table 8.2 compares realisation of intentions across social class background

Graduates from the least advantaged social class background were more likely to intend, but less likely actually to enter taught postgraduate Master's study.

from the Futuretrack study. Here we can see that graduates from the least advantaged social class background were more likely to intend, but less likely actually to enter taught postgraduate Master's study. Some 38% of those from the least advantaged group planned study at Master's level, although only 16% of them actually enrolled. For the most advantaged group, only 34% had similar plans, but 23% of that group succeeded in progressing. It is also notable that those from the most advantaged groups were 50% more likely than those from other backgrounds to enter a Master's despite having no plans to do so. These findings match results from HEFCE's IAGS quite closely. However we should also note that for all backgrounds, the majority of those who intended to pursue a Master's during Futuretrack Wave II had not done so by Wave IV.

FIGURE 8.8:  
Progression to  
postgraduate study  
by undergraduate  
attainment  
(Pathways Beyond  
Graduation)



Turning to ethnicity, the picture is more complex. Graduates from Black, Asian and Minority Ethnic (BAME) backgrounds were more likely than White British graduates to intend to undertake a Master's. However patterns vary across all ethnic groups, not just between the White British group and others. The number of respondents from some groups was quite small, making it difficult to draw conclusions with any confidence. In absolute terms BAME graduates were more

likely than White British graduates actually to do a Master's, but relative to White British students who intended to do a Master's degree, graduates of Black and Mixed/Other ethnicity were less likely to realise their ambition. Thus Black graduates' higher rate of Master's enrolment is down to much higher intention than graduates from other ethnicity, not a higher rate of success.

### Getting an offer

Enrolling in taught postgraduate study requires first of all applying for a postgraduate course and being made an offer. As noted above, some students in the Pathways Beyond Graduation survey applied for a postgraduate course but did not receive an offer and hence were unable to enrol. Many taught postgraduate Master's – and most research degrees – require at least an upper second class honours degree. Prior attainment – as with undergraduate level<sup>7</sup> – is strongly predictive of subsequent educational progression. We see this clearly in the Pathways Beyond Graduation dataset where entry to postgraduate study declines sharply in line with declining attainment. Some of the differences observed in the probability of enrolment for different groups may therefore be due to differences in degree-level attainment. We know that students from BAME and socio-economically disadvantaged backgrounds are less likely to obtain upper second class honours and above than White British and more advantaged students. Other postgraduate programmes, such as postgraduate initial teacher training, take broader

account of students' aptitudes and abilities, which means that academic attainment may be relatively less important in securing an offer.

Within the Admissions Study we were able to collect some limited background data about applicants. Where graduates were applying to the same university from which they had graduated relatively recently with a first degree we were able to determine their parental socio-economic background and school type. For some other background characteristics we had more complete data (e.g. gender, disability). The application data in Table 8.3 set this out for a range of background characteristics. Note that the right-hand column gives the total number of application records for which data were available on the selected characteristic.

We see here that being female, attending a state school and being from a socio-economically disadvantaged background are all associated with a low probability of obtaining an offer for taught postgraduate study. Students declaring a disability are more likely to receive an offer than those not making any

Characteristic	Offer rate	n
<i>School type</i>		
Independent	0.799	7,889
State	0.675	
<i>Identified as part of a widening participation scheme</i>		
No	0.575	8,071
Yes	0.533	
<i>Low Participation Neighbourhood</i>		
Quintile 1	0.507	41,663
Quintile 2	0.554	
Quintile 3	0.556	
Quintile 4	0.626	
Quintile 5	0.655	
<i>NS-SEC</i>		
Professional/managerial	0.787	6,001
Intermediate	0.736	
Routine/manual	0.691	
<i>Disability</i>		
No	0.587	41,619
Yes	0.624	
<i>Gender</i>		
Male	0.627	42,861
Female	0.568	

**TABLE 8.3:**  
Simple proportion of  
applications receiving an  
offer by selected background  
characteristics  
(Admissions Study)

<sup>7</sup> Chowdry, H., Crawford, C., Dearden, L., Goodman, A., Vignoles, A. (2013) Widening participation in higher education: analysis using linked administrative data. *Journal of the Royal Statistical Society: Series A (Statistics in Society)*, 176 (2): 431 – 457.



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such declaration. These are the 'raw' proportions, without any controls applied (such as subject and level of study). In subsequent scholarly publications the York Research Team will investigate the extent to which these are accounted for by the different distribution of applicants across different kinds of postgraduate course, subject discipline and so on. We should also note that we have limited data for some of the characteristics and, in particular, we have no data in the Admissions Study on prior attainment. Thus many of the apparent inequalities in the chance of an offer might be due to differential degree-level attainment. We certainly know that PGCE applications are largely from women (66%) compared to Master's which are more gender-balanced (54% female). PGCE applications are substantially less likely to result in an offer (26%) than Master's (70%), meaning that the lower rate of offers for women as a whole might be due in part to their distribution across courses.

### Returners

A thread running through the Consortium's work has been the difference between graduates who proceed immediately to postgraduate study and those who seek to return after time away from university doing something else. This has featured in the Academic Innovation, and Information, Advice and Guidance strands. It has also been noted in other research on postgraduates.<sup>8</sup> Given the focus of the various UtS datasets on relatively recent graduates, we have limited data only on those returning to study. Three quarters of the Pathways to Postgraduate Study survey respondents had graduated within the last decade, increasing to almost 90% of applicants in the Admissions Study. In the Futuretrack study there were few differences in terms of background between those progressing immediately to a taught postgraduate Master's and those returning after a break. We did see some possible differences in the Pathways Beyond Graduation survey – these are covered in the next section. There were also few indications in the Futuretrack study of any differences according to whether graduates had dependants or not. Very few Pathways Beyond Graduation or Pathways to Postgraduate Study respondents had dependants in the first place, reflecting the general position for the Consortium universities. This means we can only draw limited conclusions about graduates who come back to postgraduate study much later in life.

### Background characteristics

Regardless of intentions to pursue postgraduate study, we can consider certain background characteristics as barriers to postgraduate study more generally. There is extensive evidence that characteristics such as social class, ethnicity, parental education and type of secondary school attended are associated with entry to undergraduate<sup>9</sup> and some indication of continued disadvantage at postgraduate level.<sup>10</sup>

At a national level, Futuretrack suggests little overall difference between male and female graduates in terms of postgraduate study intention and enrolment. However more sophisticated statistical modelling, which controls for a range of different factors including subject of study and attainment, does show a disadvantage for female graduates. The same analysis also points to lower rates of entry to taught postgraduate Master's degrees for White British graduates in comparison to Asian, Black and Mixed/Other graduates.

At a Consortium level, we see differences from the Pathways Beyond Graduation survey in transition rates by gender, secondary school type and socio-economic background. Figure 8.9 shows rates of progression to taught postgraduate Master's study by selected characteristics. The differences by background are concerning, but they are not as stark as those seen on entry to undergraduate study. There is little difference of note across the institutions either. Parental education and socio-economic class show a clear association with progression to taught Master's study for both alumni cohorts. The more socio-economically and educationally advantaged are most likely to make the transition. The picture for neighbourhood is not so clear however and does not match HEFCE's finding that those from lower participation neighbourhoods were less likely to progress to taught postgraduate programmes.<sup>11</sup> However the relatively small numbers of respondents in Quintiles 1 and 2 mean that some sampling error is likely here (a similar observation can be made about the occupational category 'Never worked and long-term unemployed').

In Figure 8.9(b) we see little gender difference in progress to Master's study for the most recent graduates (2012), but among graduates of longer standing (2009) women are more likely than men to make the transition. Two potential explanations include women being favoured in making this later transition – although our application data do not support that view; and women being more likely to seek the transition on the basis of an unfavourable graduate labour market (e.g. facing a gender wage gap). Further research is needed in this area. However we should note that women are somewhat less likely to receive a Master's offer than men (Admissions Study: 68% offer rate against 72% respectively), which tends to undermine an explanation involving discrimination against men. Former independent school pupils were most likely to enter a Master's degree than state school pupils, although again the difference is not particularly great in comparison to differences seen at undergraduate level.

<sup>8</sup> E.g. Mellors-Bourne, R., Hooley, T. and Marriott, J. (2014) Understanding how people choose to pursue taught postgraduate study. Cambridge: CRAC.

<sup>9</sup> E.g. Gorard, S., Adnett, N., May, H., Slack, K., Smith, E. and Thomas, L. (2007) Overcoming the Barriers to Higher Education. Stoke-on-Trent: Trentham Books; and Moore, J., Sanders, J., and Higham, L. (2013) Literature review of research into widening participation to higher education: report to HEFCE and OFFA by ARC Network. Bristol: HEFCE.

<sup>10</sup> E.g. HEFCE (2013a), Wakeling and Hampden-Thompson (2013), op. cit.

<sup>11</sup> HEFCE (2013) op. cit.



FIGURE 8.9(a):  
Progression to  
taught Master's  
study by socio-  
economic  
background  
(Pathways Beyond  
Graduation)

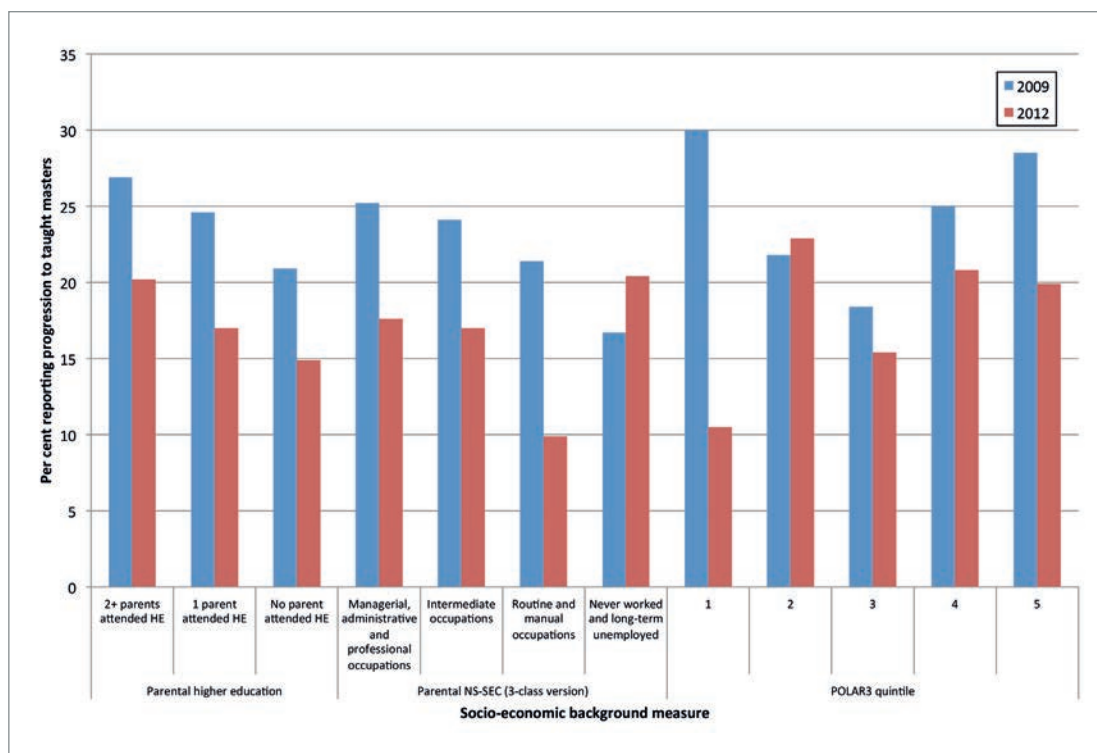
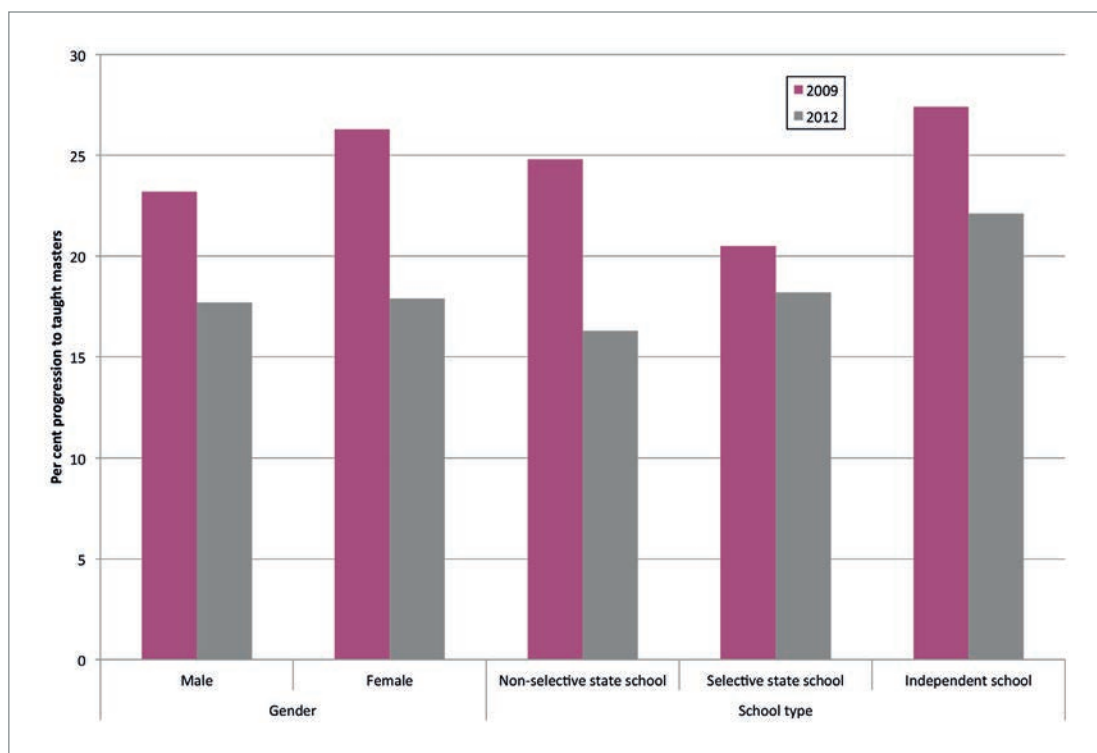


FIGURE 8.9(b):  
Progression to  
taught Master's  
study by gender  
and secondary  
school type  
(Pathways Beyond  
Graduation)



## 8.7 FINANCE

We can conceive of finance and funding as both a motivation and barrier for postgraduate study. The offer of funding might persuade some to enrol; the lack of it may be a substantial barrier to doing so. Since there has been such a focus on questions of finance and funding both in the Postgraduate Support Scheme and in discussions about taught postgraduate study for UK students more generally, we believe it justifies a section of its own. Here we look at the UtS research evidence on student debt and postgraduate study, and on funding sources and cost as a deterrent.

### Debt

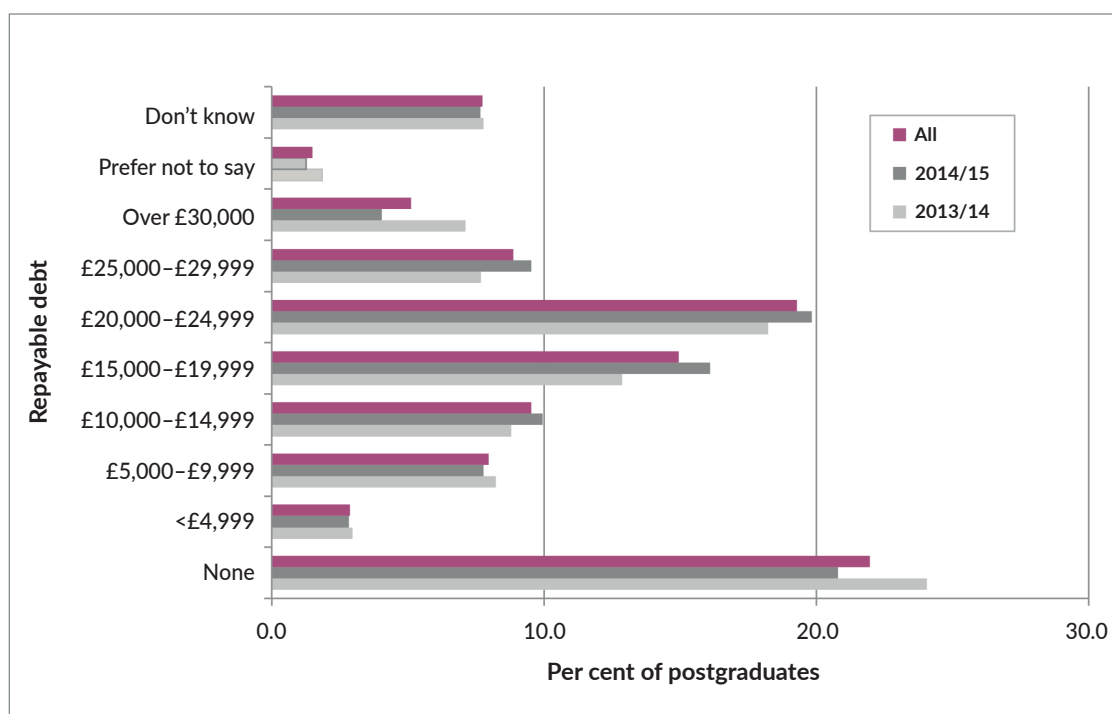
The potential for increased student debt to deter and block postgraduate enrolments has risen up the higher education agenda since the introduction of undergraduate tuition fees of up to £9,000 per annum in England in 2012. The first graduates studying under this fee regime will graduate in 2015 and hence are not included in our study. However we are still able to investigate whether graduates report debt as a deterrent or whether higher debt levels are associated with lower likelihood of postgraduate enrolment.

The evidence on debt is not entirely consistent across the different UtS research studies, although we believe that a consensus is emerging. It is important to distinguish between perceptions of debt and actual debt. About one third of

Futuretrack respondents with repayable debt agreed that the requirement to take on more debt would deter them from further study. A similar finding emerges from HEFCE's IAGS data. Within Futuretrack, those with the highest debt levels (over £20,000) were the most likely to intend to take a taught postgraduate Master's but the least likely to achieve that ambition. However once a series of statistical controls was applied, graduates' perceptions of debt emerged as more important than actual debt levels. A negative perception of debt also affected graduates' postgraduate study choices with those feeling constrained by debt more likely to live at home while studying. The exception to this general pattern was among graduates with the highest debts, where actual debt levels did matter.

We found little suggestion within the Pathways Beyond Graduation survey that debt levels were associated with continuation to postgraduate study, although there was some support for the Futuretrack finding that this did not apply to the very highest debt levels. This conclusion is further underlined by the reported debt levels of Pathways to Postgraduate Study respondents. Although the single most popular debt category was no debt, there were also substantial numbers of students with quite high debts (Figure 8.10).

FIGURE 8.10:  
Current debt  
levels of taught  
postgraduates  
(Pathways to  
Postgraduate  
Study)



Qualitative data from the CRAC study suggests that graduates rarely cited debt per se as the most significant barrier but rather saw the upfront costs of postgraduate study as a barrier. Cost was an especially pronounced barrier for graduates identified as being from underrepresented groups. Among this group, some, but not all did mention debt specifically. A few respondents suggested they could have had access to loan finance but did not think the potential outlay would be worth the expected gains. Many others saw debt in fairly positive terms because it would remove the need to pay tuition fees upfront. The way in which state-backed undergraduate student loans operate was also mentioned, with some respondents noting they would not be obliged to make repayments until a certain threshold of income is reached.

**Cost was an especially pronounced barrier for graduates identified as being from underrepresented groups.**

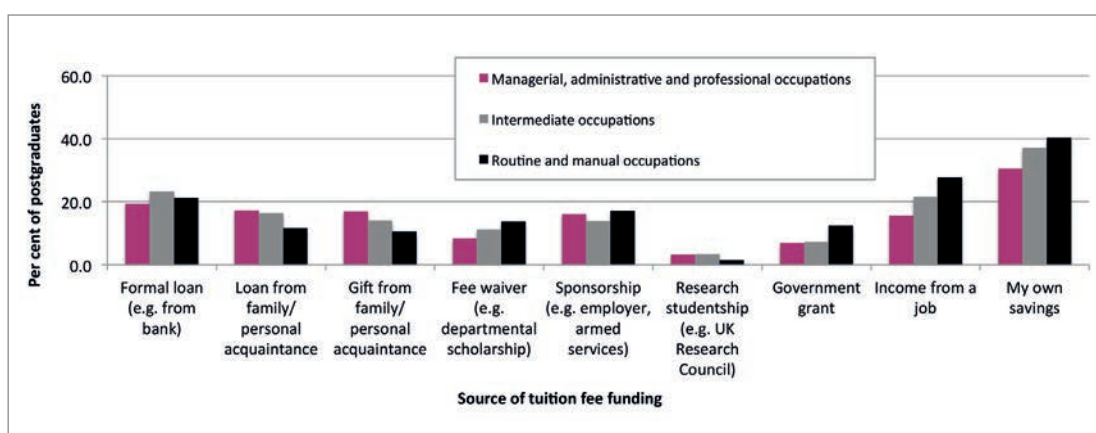
#### Source of funding

We asked postgraduate students in the Pathways to Postgraduate Study how they had funded their tuition fees and maintenance costs. We were able to investigate this

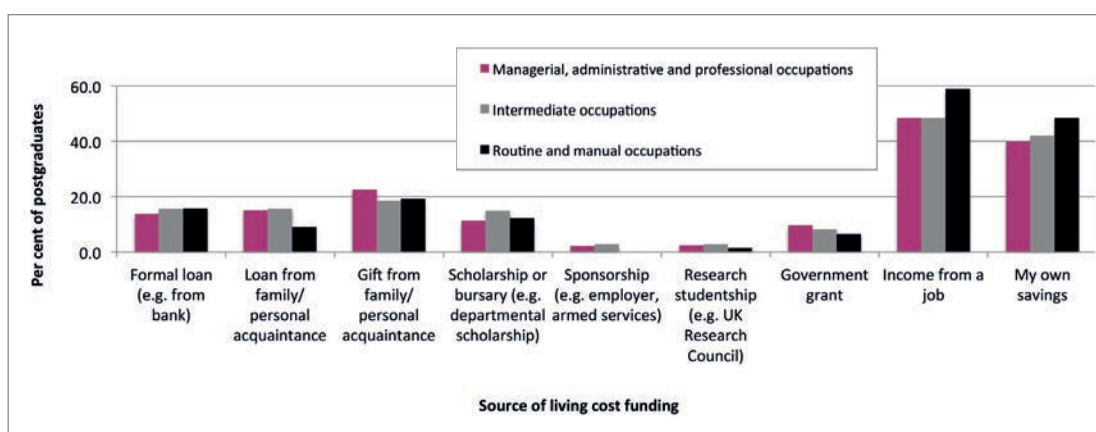
in a more granular manner than is available elsewhere. The main source of data about postgraduate students' funding sources is HESA, to whom institutions are obliged to report the 'major source of tuition fees'. No data is provided on source of living costs and it is highly unlikely that this is widely collected – Consortium universities do not hold this information about their own students. We do know from HEFCE's analysis of HESA data that about three-quarters of home taught postgraduate Master's students are self-funded for their tuition fees,<sup>12</sup> although exactly what is meant by 'self funded' requires further unpacking. This might be their own income or savings or support from family or a loan.

Futuretrack data suggests that graduates intending to progress to Master's study may have unrealistic expectations about funding as only three-fifths expected to fund the course themselves. Half expected to draw on a postgraduate award or bursary and about half paid work (noting that multiple funding sources could be specified). In practice, few Master's students receive a scholarship. Futuretrack's figures for Master's funding closely match those reported by HEFCE, with three-quarters self-funding. Futuretrack data also suggests that those who enter Master's study with the lowest student debts are the most likely to be self-financing: 84% of those with debts under £10,000 paid their own way, compared to 70% with debts over that amount.

**FIGURE 8.11(a):** Source of postgraduates' tuition fee funding by social class (Pathways to Postgraduate Study)



**FIGURE 8.11(b):** Source of postgraduates' funding for living costs by social class (Pathways to Postgraduate Study)



<sup>12</sup> HEFCE (2013b) Trends in transition from first-degree to postgraduate study: qualifiers between 2002-03 and 2010-11. Bristol: HEFCE.

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Looking at differences in funding by social class background, the Futuretrack and Pathways to Postgraduate Study results are consistent in showing that the sources drawn on vary little by this measure. Figures 8.11a and 8.11b present tuition fee and living funding sources respectively by social class background from the Pathways to Postgraduate Study survey. Here we can see that the most frequently mentioned sources of funding for tuition fees for graduates from all social class backgrounds was their own savings. Income from a job was the main source of living cost funding. Only around one fifth of postgraduates report a gift from their family as part of their financial support, although around the same proportion mention loan support from the same source. There are some social class differences here: those from Routine/Manual social class backgrounds are more likely to report using their own savings and employment income and less likely to record family support than their more advantaged peers. Here we need to note some caveats. Firstly, we cannot be certain how graduates acquired their own savings. We suspect there is a blurring between what counts as 'own' savings and what is a family gift because it seems unlikely that graduates in their early twenties with

significant student debt would have been able to accumulate substantial savings with their own income. Secondly, we do not have data about the balance of income from each source, so it may be that some of the sources listed are a relatively minor proportion of a student's overall funding package (respondents were asked to select all funding sources which apply).<sup>13</sup> Thirdly, we need to remember that students who do not have access to funding will not be able to afford postgraduate study and hence do not appear in the postgraduate student sample in the first place. In other words, those from Routine/Manual class backgrounds in the dataset may be an unusual subset of all graduates from that social class background (e.g. with higher than average familial financial resources).

Within the Futuretrack study, graduates from non-STEM academically-focussed first degrees were most likely to be self-funding. This may reflect the absence of studentships and industrial sponsorship in these subjects. It certainly underlines the British Academy's concerns about the effect of the 'broken bridge'<sup>14</sup> of Master's funding for progression to an arts/humanities PhD for socio-economically disadvantaged graduates.

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## 8.8 EMPLOYMENT OUTCOMES

Finally, we examine the outcomes for those who did and did not undertake taught postgraduate study. Here we have interesting data from all the datasets. However we should treat these with some caution as the outcomes noted are at an early point in the graduate career of our respondents and particularly so for those who have delayed their labour market entry through further study. Nevertheless, outcomes are increasingly the focus for questions about social mobility and higher education, recognising that to achieve broader policy aims, such as increasing social mobility, it is not enough for underrepresented groups simply to enter higher education; they must also benefit from it in terms of access to graduate jobs. As an example, the Futuretrack study shows differences in access to graduate jobs by social class background for graduates with and without Master's degrees, although these were not striking in size. The overall impression, from the various datasets, is that Master's graduates have not yet attained a distinct employment advantage, although there are some promising signs.

Within the Futuretrack survey, Master's graduates were concentrated in particular occupations. Almost all were found in Standard Occupational Classification major groups 1 to 4, covering Managers Directors and Senior Officials; Professional Occupations; Associate Professional and Technical Occupations; and Administrative and Secretarial Occupations. Thus the Master's graduates tended to be in higher-grade, higher-skill work than those with a first degree only, even though their salaries were not yet commensurate. This finding is replicated if looking at Futuretrack's own

classification of jobs as graduate or non-graduate and is consistent with the jobs reported by Master's graduates in the Pathways Beyond Graduation survey. Futuretrack Master's graduates were, however, among the least likely to report being satisfied with their current job. Some care is needed in interpreting this finding however as these graduates may have higher expectations (and have, as already noted, been in the labour market for a shorter amount of time).

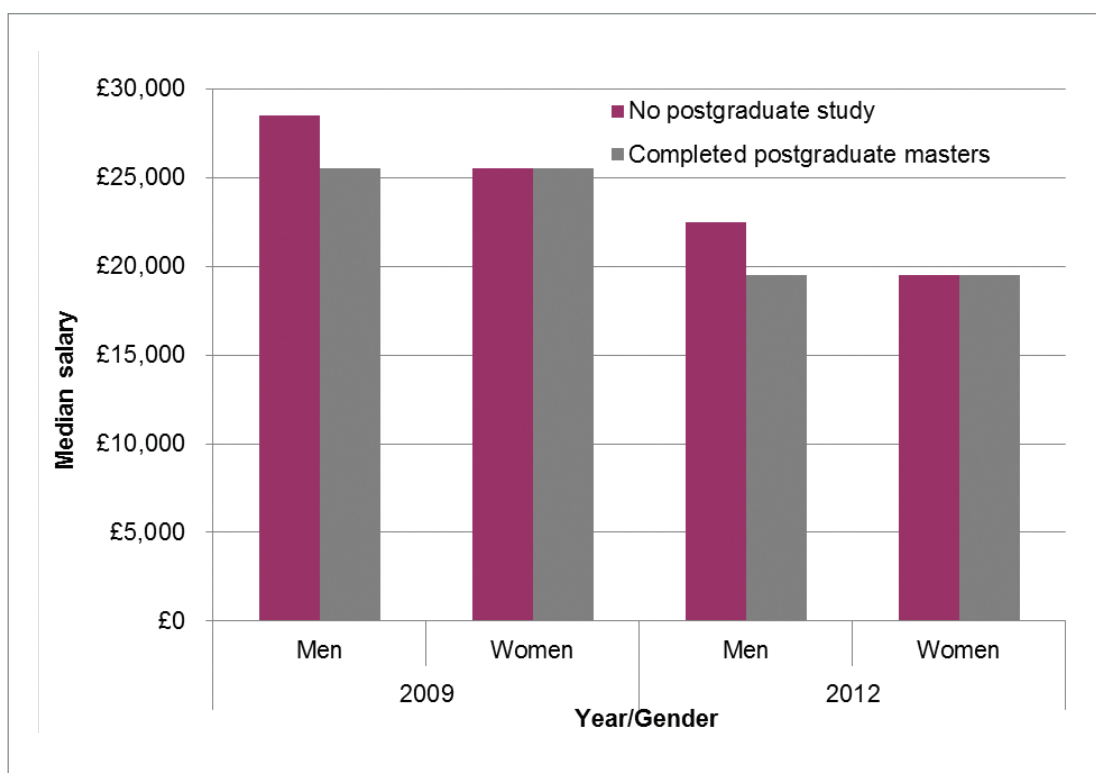
Salary data is perhaps less positive. Within our various surveys, earnings for Master's graduates are, on average, lower than those for graduates with a first-degree only. Within the Futuretrack study, those in Wave IV who had realised an intention to do a taught postgraduate Master's degree tended to have lower earnings than their peers, including those who had completed a Master's without previously expressing the intention to do so. We lack data to determine whether this reflects graduates opting for lower-paid but more satisfying work in particular sectors; more longitudinal data might show a premium for Master's over time. We also see that Futuretrack respondents who had achieved a taught postgraduate Master's were less likely than those without to be in a permanent job, but this could be related to their shorter time in the labour market. Median earnings reported in the Pathways Beyond Graduation survey are the same for women regardless of whether they have a first degree only or a taught postgraduate Master's degree. For men, the Master's graduates have slightly lower earnings.

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<sup>13</sup> That said, two-thirds of Pathways to Postgraduate Study respondents cited a single source for their tuition fee funding, with fewer than 10% having three sources or more.

<sup>14</sup> British Academy (2012) op. cit.

**FIGURE 8.12:**  
Median earnings  
by gender and  
cohort for  
graduates who  
have completed  
a taught  
postgraduate  
Master's and  
those with a  
first degree only  
(Pathways Beyond  
Graduation)



## 8.9 A TYPOLOGY FOR POSTGRADUATE WIDENING PARTICIPATION?

In this penultimate section, we propose a way of thinking about widening participation at taught postgraduate level which draws on the findings of the UtS research.

At undergraduate level there are now a set of indicators typically used to identify underrepresented students. Most commonly, these are whether the student comes from a 'low participation neighbourhood', attended state school and comes from NS-SEC socio-economic class 4-8 (based on parents' occupation). Being a 'first generation' student is sometimes added to this list. These factors are used to target outreach activities (e.g. with schools). Financial assessments are also used, but usually at the point after an offer of a place has been made and student finance information is available.

Taught postgraduates represent a much more diverse group than undergraduates. As many are in a period of transition there is ambivalence about the relative importance of their current situation and how it relates to their parents' circumstances. Some will have only recently graduated, whereas others may have been working in a graduate job for some time. This makes the use of some measures, such as postcode, problematic.

The UtS research has found some of the factors associated with inequalities in access at undergraduate level also apply at taught postgraduate level. Specifically there were inequalities by parental socio-economic class, parental education and (based on limited data) type of secondary school attended. We also saw some differences by gender and ethnicity, although we found little evidence of disadvantage for disabled students.

We can expect that these factors impact differently on access to postgraduate study.

Entry to postgraduate study can be conceived of as a three-stage process. First, there is a decision whether or not to consider postgraduate study. Many graduates may not even get to that stage. Having considered it and decided that postgraduate study is an ambition, only some graduates will reach the second stage of deciding actually to apply. Having applied (and received an offer), funding is needed to ensure enrolment. The most useful intervention measures will vary according to the stage at which they are targeted. We contend that background characteristics are most useful for outreach activity and monitoring (stages 1 and 2). Targeting financial support needs to look at household income. A complication here is that some important background measures are quite closely correlated with household income (e.g. socio-economic class).

For the Consortium institutions then, we suggest that monitoring and non-financial interventions should use postgraduate widening participation measures based on the identified inequalities in access:

- socio-economic class;
- type of secondary school attended;
- first-generation higher education;
- ethnicity;
- gender.



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Interventions at stage 3 – i.e. scholarships – would most usefully be targeted at those with low household income. Through using a basket of measures from the above list,

Consortium institutions seem to have arrived at a reasonable proxy for household income. However direct measurement of financial need would, ideally, be preferable.

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## 8.10. CONCLUSIONS AND RECOMMENDATIONS

### SUMMARY OF FINDINGS

This chapter has summarised and synthesised the findings from the various pieces of research making up the UtS strand. The research brings together a range of new evidence to give a holistic view of access to postgraduate study in England for recent UK graduates which represents a substantial contribution to understanding of this topic.

### RECOMMENDED ACTIONS

The research results themselves do not – indeed cannot – provide a ready-made answer to the question of how to widen participation to taught postgraduate study. However they do, we believe, give us a firm evidence base on which to make some recommendations for action. We think these actions fall into three distinct areas:

- *Widening the pool of home postgraduate applicants*

This involves ensuring good information, advice and guidance is provided to undergraduates and other potential postgraduate students outside the university, both graduates of longer standing and students in postgraduate ‘coldspots’. It implies both in-reach and out-reach, targeted particularly to those groups who our evidence suggest are underrepresented. This list should include graduates from disadvantaged socio-economic backgrounds, from post-1992 universities, from particular ethnic groups, former state school pupils, care leavers and first-generation students. The activity in the IAG strand represents a good first attempt at such work. For both consortium graduates and more nationally (as seen in Futuretrack), there is no lack of aspiration. Activity should more productively focus on how to go about entering postgraduate education and which courses are most suitable. The suggestions at the end of the CRAC report (Mellors-Bourne, 2015) would be worth reviewing.

- *Ensuring the postgraduate admissions process is fair*

Our evidence suggests that some groups are more likely to receive offers than others. We lack data on applicants’ attainment with which to challenge the idea that aspects of the process might be unfair, but this remains a possibility. In contrast to the attention focussed on admissions practices at undergraduate level, there has been virtually no consideration of practices at postgraduate level. This may be because postgraduate admissions have been a low-volume activity for home students. Nevertheless, we believe there is a *prima facie* case for more scrutiny of how processes work from a widening participation and equalities perspective.

- *Removing the barriers to enrolment for postgraduate applicants with an offer*

For those who have reached the point of applying and being made an offer of a place, we contend that the most important barrier at that stage is financial. There is, of course, much attrition prior to that point whereby people do not consider, do not apply or do not receive an offer of a place. However for those that do make it to that point, funding support will be critical. This suggests that direct measurement of a postgraduate applicant’s financial means is key in allocation of awards. Precisely how to do that is not part of the scope of the UtS strand and practical considerations will of course be important. A composite score based on a set of measures of disadvantage might be a workable proxy alternative to direct financial assessment.

### FURTHER RESEARCH

Finally, there is scope to extend the research reported here. This could include further analysis of any additional waves of the Futuretrack study. It could also fruitfully involve repeating the PbG and PtPG surveys with additional cohorts and hopefully larger samples and/or extending the surveys to other universities. Finally there is scope to extend the coverage of the Admissions Study by adding more variables and/or adding a qualitative element investigating how postgraduate application and admission works for selectors (building on Mellors-Bourne et al.’s (2014) work with applicants).



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# Chapter 9 Independent Project Evaluation

RACHEL MORETON, CFE



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## 9.1 BACKGROUND AND INTRODUCTION

At the outset, the project steering group recruited an external organisation CFE research of Leicester to work with them to undertake an independent evaluation of the pilot project. The evaluation comprised two distinct stages and had the following objectives:

### Phase One:

- Design a qualitative and quantitative evaluation framework (including indicators) and methodology for the project targeting under-represented groups accessing PGT.
- Produce a specification guide of MIS data collection requirements.
- Deliver a briefing session to consortium steering group members explaining the evaluation framework and methodology, as well as stipulating the data requirements necessary for phase two of the evaluation.

### Phase Two:

- Evaluate the project against the framework and methodology proposed in phase one and the evaluation workplan.
- Produce a final evaluation report to summarise impact and progress made during the project.

As stated in chapter 2, the pilot project was delivered as four strands of activity:

- **Financial:** *To develop, pilot and evaluate models of financing PGT study with a view to creating a sustainable and equitable future for postgraduate study.*
- **Academic innovation:** *To develop and implement new academic products in order to encourage access, fairness, social mobility and the sustainability of PGT provision.*

- **Information advice and guidance:** *To develop and implement targeted interventions to provide information, advice and guidance to students to help attract and retain quality candidates. To share good practice within and outside the consortium.*
- **Understanding the student:** *To provide a detailed picture of postgraduate taught applications and enrolment at institutional level. To develop an understanding of motivations and barriers to PGT study. To model the characteristics of PGT students and how these compare with undergraduate widening participation characteristics.*

The evaluation covers the first three of these strands and considered the following questions:

- **What has the pilot achieved?**
- **To what extent is there evidence that the interventions funded have impacted upon students and potential PGT students?**
- **What can be learned from the pilot to help inform future development of widening participation in PGT?**

The first phase was delivered between March – June 2014 and involved a review of project documents and resulted in the evaluation framework being developed. A copy of the logic chain framework is held at Appendix 5.

The framework formed the basis for phase 2 of the evaluation which ran from April to July 2015 and involved interviews with staff from all six partners institutions, and a series of short online surveys carried out with students who received a PSS scholarship and those who had applied for a scholarship and had been unsuccessful.

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## 9.2 EVALUATION FINDINGS

Below is a summary of the findings of the evaluation team. The full report from CFE research can be found at [www.postgradsupport.co.uk/research](http://www.postgradsupport.co.uk/research)

### • FINANCIAL STRAND

All six consortium partners designed and delivered scholarship schemes for PGT students from disadvantaged backgrounds or who are under-represented in PGT study. Scholarship awards were typically £10,000, although smaller and larger amounts were made available by some institutions. While recipients were grateful for the funding, several commented in our survey that the amount was not enough to cover both tuition fees and living costs.

Some scholarships were awarded as a combination of fee waivers and cash awards, others were all cash. The survey of scholarship recipients showed high levels of satisfaction with the form of award, irrespective of whether it was cash, fee waiver or a combination.

All of the scholarship schemes were over-subscribed. A total of 2,346 applications were received and 416 awards made. This demonstrates clear demand for financial support for PGT study.

Each scholarship scheme had its own set of eligibility criteria. These were weighted by institutions to enable ranking of applicants and targeting of particular groups of potential students. Criteria were designed to target students from disadvantaged backgrounds or who were currently under-represented in PGT study. Commonly used criteria included indicators of low-income, being a former care leaver, being disabled, and geographic factors (living in an area of low participation in higher education or in a deprived area at the start of undergraduate study).

In addition to evidence of meeting the eligibility criteria, most institutions asked applicants to provide a personal statement in support of their application. This provided a useful mechanism for deciding which students to fund and further targeting of the limited scholarships. However, care was needed to ensure decisions based on this information were fair and transparent. Scholarship holders felt the application was straightforward and not too time consuming. The information provided about the scheme was clear and useful to them.

Simple scholarship schemes, without lots of variability in criteria and award types, were found to be most effective. Simple schemes were both straightforward to administer for the institutions and easy for potential students to understand.

92 per cent of scholarship recipients completing our survey said the funding had enabled them to take up their studies. It had also helped them to engage more in their course (for example enabling them to purchase necessary resources) and they say they are more likely to continue and complete their studies as a result. This finding is supported by qualitative feedback collected by consortium partners.

Among unsuccessful scholarship applicants that responded to our survey, just under a third went on to study at postgraduate level. Most of those who did not progress to PG study were in employment at the time of the survey. Concerns with finance were by far the most common reasons given for not progressing to PGT study: 91 out of 99 respondents said lack of financial support was a key reason. 95 of 101 unsuccessful scholarship applicants said they definitely would have taken up PG study if their application for funding had been successful.

For those who are motivated to undertake PGT study, finance appears to be a key barrier to progression and financial support in the form of a scholarship can therefore make all the difference to these students.

### • INFORMATION, ADVICE AND GUIDANCE (IAG)

All institutions provided IAG activity as part of the pilot, although some placed greater emphasis on this element than others. Initial insight meetings were held with staff and students to explore experiences of the transition to PGT study. This delivered valuable understanding for staff from consortium partners into the needs of potential PGT students and informed the development of a framework for IAG available at: [www.postgradsupport.co.uk/research/](http://www.postgradsupport.co.uk/research/)

Twenty-eight events were held across the consortium to provide a Master's 'taster' and offer insight into PGT study. In addition one institution delivered an e-Buddying scheme to connect current and potential PGT students.

IAG beyond the point of entry to the course remains as important as at undergraduate level. Enhanced or additional IAG was provided to PGT students from disadvantaged backgrounds or under-represented groups. These were often also scholarship holders. This included induction sessions, targeted events, fast-tracked appointments with a careers adviser and an extension of methods used to inform and support undergraduate students, such as blogs written by or case studies of current WP students. The activities aimed to support the transition to PGT study as well as aiding successful progression on from their course.

The IAG strand was beneficial for both students and participating institutions. Engagement with students helped develop staff understanding of their concerns and information needs. In particular students were concerned about financing PGT study, their ability to cope with the academic and workload demands, and whether they will fit in.

Evaluations of the different events delivered show that students found them useful and felt more prepared for and confident about PGT study than beforehand. Contact between peers (current and potential PGT students) appears to be particularly useful and well received. The e-Buddying scheme provided a flexible way of facilitating peer-to-peer support that was less resource intensive than traditional mentoring.

Much of the support and information that students say they wanted appeared to be already provided by institutions.

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The strand showed that consideration needs to be given to how support is marketed, signposted and delivered to ensure that it is visible, appropriate and accessible to PGT students. The findings of the IAG strand demonstrated that there are groups with differing needs within the PGT cohort; organisations therefore need to be mindful of how their existing offer enables or acts as a barrier to participation. PGT study is generally of short duration but intensive. Innovative ways are needed to make IAG quick and easy to access for busy students, particularly for those students from less-advantaged backgrounds and those with commitments to jobs and families.

#### • ACADEMIC INNOVATION

The academic innovation strand was the most ambitious and challenging strand to deliver and as a result not all objectives were achieved across all consortium partners. Three new products were developed and launched, and a further new course developed that will run from October 2015. New courses launched include a part-time PGT taster course for those without the confidence and / or qualifications to study at this level, and an online career development and employability course for recent graduates. These courses

have provided the institution concerned with learning and products that will form the basis of future development in this area.

One institution also carried out research exploring the use of integrated Master's (degrees combining undergraduate and postgraduate study in a single award) and the increasing use of PGT as a stepping stone to postgraduate research.

All institutions contributed to the production of an online toolkit to support academic innovation. This and the pilot more broadly have helped to improve and share knowledge and good practice on how best to develop products that encourage progression to PGT for disadvantaged and under-represented groups.

The timeframe of the pilot was rather short to develop new and innovative courses and the fact that responsibility for academic innovation is not located in a single team or department meant it was difficult to coordinate activity across six large institutions. Whilst some institutions felt they had benefited from the opportunity to reflect on academic programme development and learn from other institutions, others felt they had gained less from this particular strand.

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### 9.3 CONCLUSIONS DRAWN FROM THE EVALUATION

The pilot in many instances has focused on reaching current undergraduate students and recent alumni. This is perhaps not unreasonable given the timescales of the pilot. However, more work is needed to test and develop effective ways of reaching potential students who are not in education.

Overall the Sheffield-led consortium PSS pilot has been successful in achieving most of its original aims. Although our evaluation is limited in its ability to assess longer-term

impact, our evidence suggests that the pilot has contributed to supporting widening participation in postgraduate study. The scholarships in particular have been both popular and impactful. The learning from the pilot has strengthened the knowledge base on which further work to support PGT progression can be developed.

The project evaluation report is available from [www.postgradsupport.co.uk/research/](http://www.postgradsupport.co.uk/research/)





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# Chapter 10 Concluding Comments

DR. TONY STRIKE *University of Sheffield*

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Evidence gathered as part of our project supports Milburn's warning that left unchecked –

*"Postgraduate education is in danger of becoming "the new frontier of widening participation" with prospective students currently barred from study if they cannot afford fees or access sufficient credit." (Higher Education Commission, 2012, p.53).*

The Sheffield-led consortium of six selective, research intensive, English Russell Group institutions was the largest project in terms of scale of the pilot projects funded by the HEFCE PSS 2014/15 scheme. Our six participating institutions have distinct missions, visions and strategies, however, common institutional, regional, and economic interests and challenges meant the success of this project was central to all our institutional strategies and as such we were willing to work across institutional boundaries. Each institution was committed to fairness and equity of access to education based on merit; regardless of background, characteristics or ability to self-fund, and to sustaining and growing PGT student numbers.

Our project has enabled us to test options for finance and undertake a range of activity which will help HEFCE, Government and institutions develop strategies to ensure the continued success of postgraduate education, and particularly the taught element of the sector, from 2015. Our project research brings together a range of new evidence to give a holistic view of access to postgraduate study in England for recent UK graduates which represents a substantial contribution to the sector's understanding of this topic.

Through our project, we know considerably more about the multi-dimensional factors that hinder progression to postgraduate study, including what motivates people to further study, what the underlying demand is, what advice and guidance works and why some institutions are more successful in recruiting than others.

In human terms, we consider our Postgraduate Taught Scholarship schemes to be our greatest project achievement. We successfully designed and launched targeted scholarship schemes which enabled 416 students who would otherwise have been prevented from undertaking PGT study to commence their programme of study in 2014. Through this we have been able to examine the WP characteristics of this cohort and have gained valuable insight into the specific needs of this endangered group.

Finally, our project was ambitious and complex in design in an attempt to understand the range of barriers which prevent progression to PGT study. The project has reminded us that PGT students are not a homogenous group. Our project has highlighted the need for a genuinely holistic approach to supporting WP PGT students where funding is only part of the response. Our project does not – indeed cannot – provide a ready-made answer to the question of equitable progression to PGT. However it does, we believe, give us a firm evidence base on which further work to support PGT progression can be developed.





# PSS Scholarship Holder Case Studies

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## CALUM CARSON

Master's in Social Research  
*University of Leeds*



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For the past six years I have been working in an administrative position, but the desire to pursue postgraduate study and research in some shape or form had been growing as my charity work with charities within Leeds helped me to form a keen interest in the issues of in-work poverty and the cost of living in Britain today. I had been unsuccessful in my applications for a research postgraduate position and I realised that there were additional skills that I needed to be able to demonstrate; I knew that a Master's would be helpful preparation for this. When it became apparent that a part-time Master's was not an option, I began considering the financial implications of embarking on a full-time Master's based on my salary and (rather small) savings. After doing the sums I rapidly came to the conclusion that it was, monetarily speaking, simply not a viable option for me, having no familial assistance available to me to help with funding. I applied for the Postgraduate Financial Support Package to be sure that I had done all that I could to attempt to fulfil my ambitions at this time, and was beyond thrilled when I was selected as a recipient. Following the award, I gave up work to embark on a Master's in Social Research in the School of Sociology, looking in particular at wage disparity, social security reform, and the campaign for a greater implementation of the Living Wage across Britain.

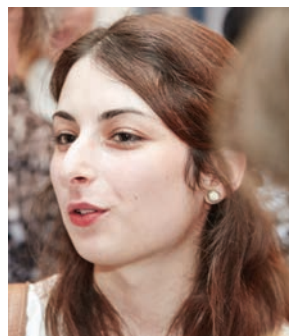
Needless to say, I could not have embarked on my chosen postgraduate course without this award. I was the first in my family to go to University, and am from a low-income neighbourhood and background which meant I could not call on the traditional monetary support to finance such an endeavour, so I can unequivocally state that without this scheme I would be no nearer to fulfilling my ambition of embarking on a PhD (and hopefully, a career) in the field of social research and welfare policy.

The course itself has been a wonderful reintroduction into the academic world, and run in such a way that I have been able to pursue my own academic interests of in-work poverty and the Living Wage within the remit of the modules in a manner that has resulted in exceptionally high marks for all assessments thus far, which after being six years "out of practice" as it were is a fantastic confidence boost. And I can happily now report that I have been offered five ESRC studentships to undertake a PhD, and in September I will be continuing at the University of Leeds, focusing on the first in-depth study of the campaign for the Living Wage in Britain since 2001, a research project of my own design. None of this would have been possible without the award of this scholarship.

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## EMMA BOURNE

MA History of Art  
*University of Leeds*



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For the first eighteen years of my life I grew up living with my mum on a council estate, in a high-rise block of flats within an inner city area of Birmingham. I attended a secondary school whose GCSE pass rate fell in the fifty per cent bracket, and I was aware that going to university was not common for people from an area like mine. Being offered a place on my undergraduate degree in Fine Art felt like a huge achievement and allowed me to learn and develop many skills. In my final year at university I realised that I was motivated and passionate enough with the ambition to take my studies further. Having researched several Master's' degree programmes, I was immediately drawn to the modules, course structure and staff members at the University of Leeds. My research interests predominantly lie within women's' artwork and feminist practice, with a specific focus on photography, performance and installation. Besides being one of the top universities, the University of Leeds offered the privilege of being able to work with the renowned feminist art historian, Professor Griselda Pollock, which I knew would be invaluable in helping me to refine and develop my own research.

Although, despite the fact that the University of Leeds became my first choice for master's study, working hard was not enough to get me here. To be able to move away from home and pay for my course fees, I needed more than a good degree; I needed money. The receipt of the Postgraduate Financial Support Package provided me with an incredible opportunity that I would not have otherwise had access to;

it has allowed me to deepen my knowledge, critically challenge and refine my research, and to develop in confidence. Apart from allowing me to study at the University of Leeds, the funding has given me additional time to be productive and has allowed me to use any extra money in ways that will benefit my studies. I have recently submitted a dissertation proposal to research a piece of artwork by Mona Hatoum, titled *Recollection* (1995). This piece of work has been highly under-researched and provides me with the scope to be able to bring a new reading to the work. Part of this project required me to travel to the Centre Pompidou in Paris to view the work at Hatoum's upcoming solo show in late June; this would not have been possible without my funding.

Additionally, I have been able to volunteer my time in a variety of roles, all of which will benefit my future. I volunteer one morning a week as an archival assistant in the Brotherton Library, Special Collections. I also volunteer as an art editor for an online fashion and lifestyle magazine called *Jungle*, and I sit on the student members' committee for the Association of Art Historians. As well as this, I also volunteer as a Brownie leader, helping girls aged 7-10 years (living in a low-income area) to develop skills and gain confidence. These roles have provided me with valuable experience, skills, confidence and connections, which I shall take forward into my future employment. My Master's degree is an invaluable step towards achieving my future ambitions and aspirations of embarking upon an academic career.

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## FUTSUMBIRHAN WELDEAB

MSc Actuarial Science  
*University of Manchester*



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I was a refugee in the UK with no family and no relatives here. Now I have indefinite leave to remain. I'm the only one to go to university from my family and had great desire to educate myself up to master's level and become a role model for other people who are in a similar situation with my background.

I want to be an actuary. My BSc Mathematics may be enough to start with. But I decided to do the master's in actuarial science to get an understanding of the profession and get valuable skills that will help me to pass the actuarial profession exams.

But, as we all know, pursuing a master's degree is a big financial commitment. After I finished my bachelor's, my first plan was to look for work to save a bit of money. My second plan was to look for a scholarship. The requirements for the postgraduate scholarship at The University of Manchester

exactly fit to my background - I applied and I became successful. When I secured the scholarship, all my worries were gone. And just before the start of my course I managed to secure a 16 hours paid job over the weekend. I am glad that I'm still working - the money I make over the weekend is helping me for my daily expenses. But having said this, it is not easy to work considering the workload of the master's course, as it is extremely intense.

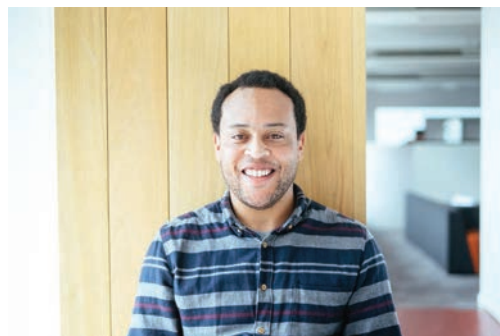
A master's degree is worth doing. It is an opportunity to study the field you are interested in deeply. I think it gives an internal satisfaction as well. Personally speaking, I feel that I have achieved something more in life than before.

A lot of people see a poor background as a drawback. I always argue with this and show them everything is possible as long as the passion, enthusiasm and dedication is there.

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## MICHAEL RILEY JONES

MA Sociology  
*University of Manchester*



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I come from a working-class family. Within my wider family further education was not really an option and so not encouraged. I began my undergraduate studies at 27, as a mature student; no one in my immediate family had studied beyond secondary education, and so it was a big step.

During my undergraduate degree I observed that much of the literature was from a perspective that didn't necessarily relate to my personal background or perspective, and areas that touched on sociology sparked an interest in a subject I hadn't formally been exposed to before. I gained a place to study an MA in Sociology at The University of Manchester, supported by a postgraduate scholarship, which reduced my financial concerns. But I was worried about juggling part time work with all the reading, as well as whether I was academically capable of working to master's level. I was concerned about completing all the reading, as I knew there would be a lot and, due to my dyslexia, I read very slowly and easily get lost, struggling to remember much of what I've read. I felt like master's study was for people different to me, the exceptional students, those students that never left the library.

The reality has been very different. I have learnt to read more effectively, and more importantly realised that I can't always read everything and that it's okay. As for the ability aspect, I have done well in my assessments, better than I thought I could. Your fears about the rest of the class being 'smarter', or 'better' are soon revealed as irrational, and wrong, and irrespective of prior knowledge, it becomes clear that you can do as well as you want, as long as you apply yourself.

The scholarship quite simply made study possible; I could not have afforded the course otherwise and therefore would not have considered the idea of furthering my education. I suppose in a material way the scholarship has facilitated my access to the course, but it's also allowed me personally and academically to grow, triggering a social and political engagement previously off limits. I think my mixed ethnicity has always provided me with different experiences and an alternative outlook, in both academia and in my professional life. I hope that this master's will provide me with the opportunity to work towards bringing this to a future research practice.



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## KEVIN BICKERDIKE

MA Modern and Contemporary Literature  
*Newcastle University*



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Before my undergraduate degree I had to do an access course to get the qualifications needed to get into university. Right from there I knew I wanted to progress to undergraduate and then straight onto postgraduate with the possibility of remaining in Literature in academia. It's a passion and I knew that was what I wanted to do so applying for my postgraduate degree was the right next step.

I studied my undergraduate degree as a mature student at Teesside University and came to Newcastle University straight after. Newcastle University offered two courses in English Literature and I selected Modern and contemporary as it best matched my literary interests.

In terms of what I most enjoy about studying my course it's all been great but I have loved how specific it is to what I am interested in. Compared to my undergraduate degree there is a lot more choice in what you can write about for assignments. I am also able to bring outside texts into my work and formulate my own questions.

Financial problems were the most significant barrier for me when I was considering postgraduate study. I worked throughout my whole undergraduate degree but due to being a mature student and having life commitments, I only managed to save enough money for one term. I had saved some money but not enough to pay for my full MA so I would have had to take some time out to save enough money to pay for my course. Coming to Newcastle University was not all about the scholarship, though. I would have always come to Newcastle to do my postgraduate degree, it would have just taken me longer to get here.

I plan on applying for a PhD as I would love to stay in academia and research, therefore I will take a short hiatus after completing my MA dissertation to complete my proposal and funding applications.

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**RYAN SEWELL**  
MA International Studies  
*Newcastle University*



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I came to Newcastle to study an undergraduate degree in Politics through the Newcastle University supported entry route programme PARTNERS. I then chose to pursue my Master's in International Studies because of the diverse range of modules available ranging from EU Foreign Policy to post-structural ethical philosophies.

Being a postgrad is very different, I'd consider it all to be for the better. The workload is a bit heavier but it's also more interesting and it pays off more with the smaller seminar groups in a longer discussion. You get a greater feeling of satisfaction, another great bonus is that your relationship with the staff is a one of far more respect. In politics we get invited to the research seminar series and have organised a game of football against the staff at the end of the year, this would have been a lot harder at undergraduate level.

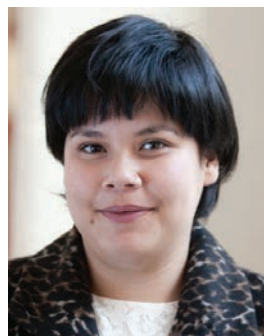
I am the first in my family to attend University and I went to a school where there is a very low number of students who go onto attend university. As a postgraduate the main obstacle for me was finance. Many of my friends have parents who pay their rent and fees for them. I was concerned that I would have to sacrifice my studies by working to fund my studies. Without the Newcastle University Postgraduate Scholarship I would have had to postpone my studies for at least two years.

I am not entirely sure of my dream career but two things that definitely appeal are going down the academic route or working within a university, the other dream is to work for the European Union and with the dedicated modules it's one of the best ways to really learn about it and have a good chance.

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## ALYSSA JONES MSc

MSc Biological and Bioprocess Engineering  
*University of Sheffield*



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Thanks to the Postgraduate Scholarship Scheme, partly funded by alumni, I was able to take up a place on the MSc (Eng) Biological and Bioprocess Engineering course in September 2014 – something I never dreamed would be possible.

The course is fantastic – it is improving my technical skills and engineering knowledge, as well as helping me to build a personal network for my future career prospects. I am interested in the body and its physiological processes and plan to put my knowledge and skills into use in the production of medical devices in the future.

Everything I am learning is based on real research being carried out here at Sheffield right now. When I graduate I know my knowledge will be based on the leading developments in the field.

I feel extremely lucky to have been given this opportunity, as there are many students who will not have the same chance to continue their studies due to financial constraints.

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## PATRICK BROWN

MA Globalisation and Development  
*University of Sheffield*



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I had planned during my UG degree to complete an MA programme. I had originally planned to seek scholarship opportunities in the US, as the cost in the UK would have been prohibitive, and research showed many US universities had a wide range of scholarship opportunities. However after hearing about this PSS programme I applied immediately.

This scholarship will undoubtedly enable me to act on my goals a lot sooner than if I had had to save or travel for a Master's. It has also provided extra financial security, which, coming from a low income background has had and will have a significant impact on my personal stability in the long term.

Over the next year I am working on several projects. Alongside my Master's degree I work two part time jobs. One is as director of a small international development charity called 'the long well walk'. Based in Sheffield, this organisation fundraises and develops sustainable, community-led water and sanitation projects across sub-Saharan Africa. We currently work in Kenya, Uganda, Tanzania, South Sudan, Zimbabwe, Zambia, Namibia and Malawi. This obviously ties in closely with my Master's

course, and as such I am currently working to develop a partnership with the politics department which will enable me to develop a university funded project in Kenya, which myself and other students could carry out dissertation research on through fieldwork. I am currently working with several academics to draft a funding proposal for this, and if successful hope to work with several university networks to promote my findings. I carried out a similar project in Kampala, Uganda last year working with women's cooperative in urban slums to fair trade their handicraft products in the UK. The research from this project was shortlisted for a departmental prize upon graduation.

I also have plans to launch a corporate social responsibility programme working with organisations, such as companies and universities to decrease their waste and increase charitable outputs by providing them with co-branded stainless steel water bottles. The proceeds from this would support the charity's projects in Africa. I would like to have several schemes like this in place before I leave Sheffield.

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**KATHRYN THOMPSON**  
MA Ancient Visual and Material Culture  
*University of Warwick*



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Very soon into my Bachelor's degree, I realised that studying the ancient world at undergraduate level alone was not going to satiate the passion I had discovered for my discipline. By the end of my second year, I had my heart set on undertaking a Master's degree – in particular, the Taught MA in Ancient Visual and Material Culture offered by the Classics department at Warwick. This MA programme was ideal for me for several reasons: I had come to Warwick primarily as a linguist, having studied Latin to A-Level and excited by the prospect of learning Ancient Greek, and so I enrolled on the Q800 Classics course – a course primarily aimed at honing Latin and Ancient Greek reading skills to advanced level and the detailed study of ancient texts; in truth, I knew very little about the 'wider' ancient world when I first came to Warwick; but by the end of my undergraduate degree I had developed a particular interest in the art and visual culture of Greco-Roman civilisation, and it was this interest that I was eager to pursue. The Taught MA would provide me with the necessary all-round training in vital areas of material culture based research – such as epigraphy, numismatics and reception studies – and help me use my language skills

to best effect in order to make a unique contribution to research in this area. Warwick's Classics and Ancient History Department is especially strong in the fields of material culture and the Classical Tradition, so I knew it was definitely an academic community that I wanted to be a part of.

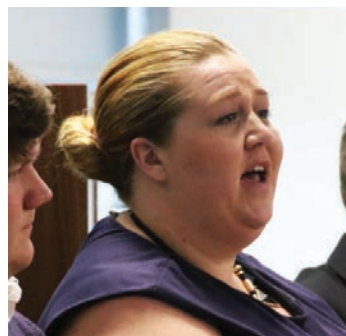
However, quickly my thoughts turned to the dreaded obstacle faced by so many postgraduate students – including many more prospective ones – throughout the country: funding. As an undergraduate I relied heavily on financial support in the form of grants, student loans and bursaries. I was thrilled to achieve a high first at the end of my three years but my family circumstances meant that I wasn't in a position to fund myself through postgraduate study. I am the first in my family to have attended university and whilst my parents were – indeed, still are – extremely supportive of my interests and my decision to continue to postgraduate level, they simply weren't in a position to assist me financially. The Warwick Taught Master's Scholarship came along at just the right time, enabling me to undertake the fundamental Master's training required for me to embark upon my dream of doctoral study.



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## LYNDSEY EGGISON

MA Education studies  
*University of Warwick*



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I was brought up in a normal working class family. My dad left school to take up an apprenticeship and my mom left school at 15 with a few basic qualifications. Neither of my parents were particularly knowledgeable or supportive of education beyond the mainstream compulsory education provided. I was living on my own at the age of 18. There was little or no support for me to go to university. I became a single mom at the age of 28 and decided to change my life for the better by going to uni. I wanted to give back and show my son how powerful education can be. However I felt my dream of becoming a teacher would be short lived. I missed out on a 2:1 by just a few marks, which meant that I couldn't access financial support for the PGCE. To continue my passion for education the only alternative was to take a Master's, however, financially again this seemed impossible. My finances were none existent; I had barely got by on student loans. I felt like this was the end of my journey. Until I discovered the taught Master's scholarship and a glimmer of hope was given.

Before I started my main worries were that my academic abilities were not up to scratch for Master's level and that I would struggle to support myself and my son financially. However, I have loved being part of the Master's programme as I have made some fantastic friends from a variety of different countries and some great networking contacts within education which can only help my future. The biggest challenge was finding the time to work, be mom, be homemaker, be dad, be a student and also manage finances. I recently took the decision to take a temporary withdrawal from my Master's course which means I will complete it a year later than planned. The benefit of this is that it's given me time to gain some career-related paid work experience in a local secondary school which will help my future plans as well as helping me to save up funds for when I go back to uni next year.

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## DANIEL MITCHELL

MSc Econometrics

University of York



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I wanted to study Econometrics at a higher level as I enjoy studying a subject where I learn skills I can use in real situations. Econometrics can be applied to various jobs in government such as in government policy evaluations. I was able to use some of the skills I had learnt on my Undergraduate Degree in my summer internship at the Department of Business and Innovation. I was there for 9 weeks in London and it was a useful experience as it gave me a sense of what I want to do in the future. It was during my internship that I found out about the scholarship provided by HEFCE and decided to apply to improve and enhance the skills I was utilising.

Within my Master's I hope to look into Econometrics in education. Whilst on my internship I visited the Department of Education and for my dissertation I hope to look at the impact of tuition fee changes over time with the effect on widening participation on an aggregate and group basis. Hopefully the contacts I made through my internship will provide me with government designs that I can use in my thesis.

Although I loved my time at University as an undergraduate I was faced with a number of challenges. I missed 4 weeks of my summer term in second year which was a consequence of being diagnosed with Crohn's disease. This was initially a struggle when I started University certainly around exam times, but with new medication and help from the University's disability service I have been able to get better treatment in exams. I was worried about seeking help at first and some people may think that stating a disability maybe a disadvantage when applying for University or jobs but this is not the case and there are lots of schemes in place to help!

It was brilliant when I found out I had got the scholarship as at the same time my sister found out she had got into University so there were two celebrations at once! I have never had any financial help before as my dad's earnings have always been just over the threshold. It is great to finally get some support as I would not have been able to cover all of the costs of doing a Master's otherwise.

After this Master's I hope to get a job in the Civil Service where I can fully apply skills I have learnt on my undergraduate and postgraduate degrees.

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## HEATHER ASPINALL

MA Postproduction with Visual Effects  
*University of York*



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I graduated in 2013 with a degree in Film and Media Studies from the University of Wales Trinity Saint David. With the scholarship I am now going on to study Postproduction with Visual Effects at the University of York. I am doing Master's as it is difficult to get more than a temporary job in Postproduction without specialist skills. I hope after my degree either to gain a full time position in a Postproduction company, become a successful freelance editor or set up my own business working with the public editing their own home videos and have customer relationships which are often lost in bigger businesses.

Without the bursary I would not have been able to do this Master's and as a consequence would not have been able to get a job in the film and television industries. The support the University is also giving me in regards to my dyslexia has been great. I have a learning plan which includes extra time for assessments, extended library loans and access to special equipment to help me with my studies.

I'm looking forward to studying at York for a number of reasons. York is a really pretty place to study and I am eager

to explore the city and the surrounding areas. There is also a great postgraduate community as well as lots of societies and clubs to get involved in. I am interested in running and I recently ran the Milton Keynes marathon so I can't wait to join York Athletics and use the new facilities at the York Sports Village!

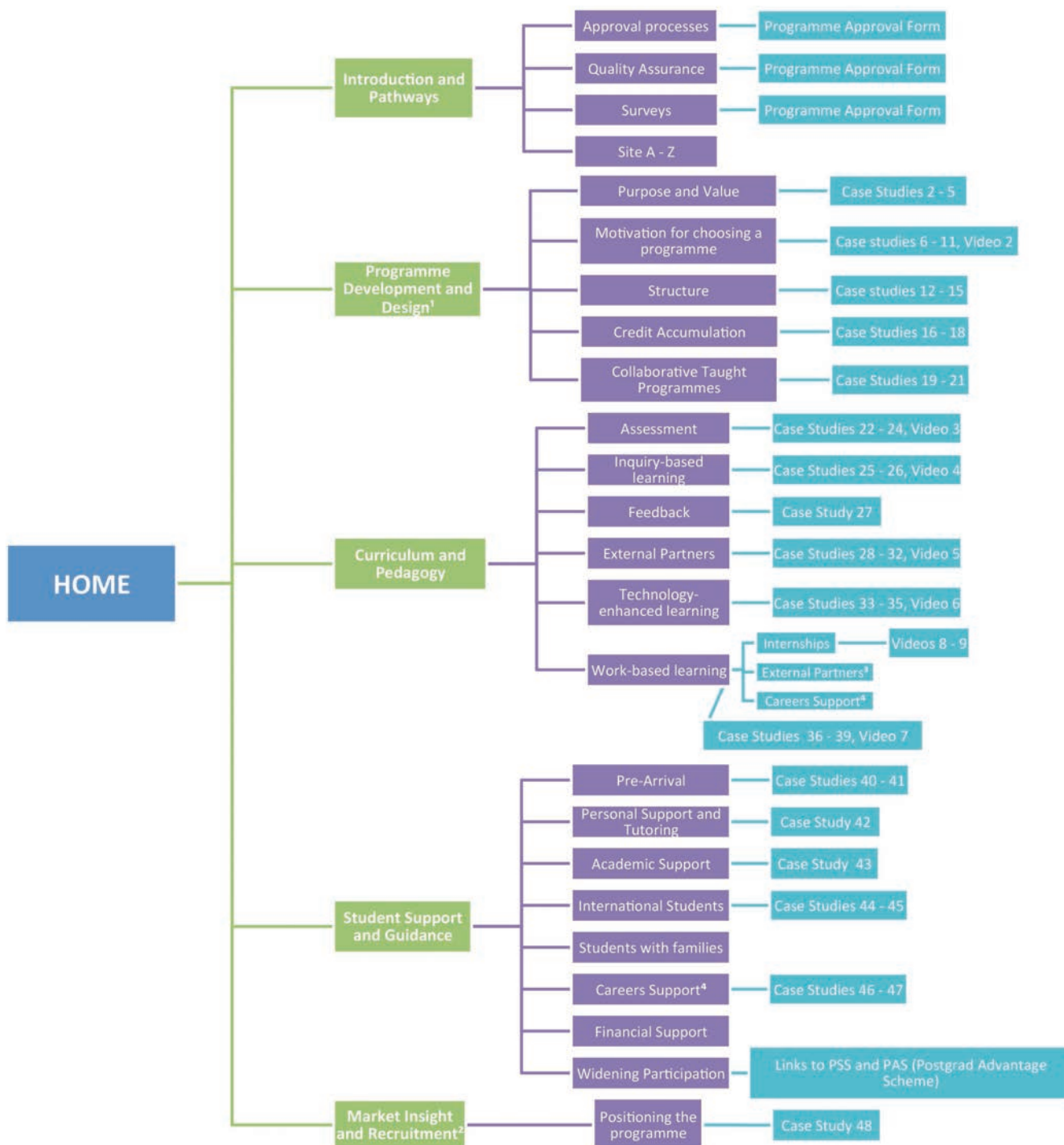
I'm looking forward to making new friends on the course, getting my hands on the state of the art picture finishing suites and working on film projects from other postgraduate courses in the department and talking to them about their specialisms such as cinematography and directing. York is also brilliant for networking and the both the department of Theatre, Film and Television and the Alumni Network hold various events to network with industry professionals.

A lot of people don't know about scholarships and the level of support you can receive, especially for those with learning difficulties. I hope that my story encourages others to look into postgraduate study as an option and the funding that is available, because it is not just for subjects like Science and Maths but the arts as well!

# Toolkit for PGT Programme Innovation

# Sitemap

[www.postgradsupport.co.uk](http://www.postgradsupport.co.uk)



<sup>1</sup> Within Programme Development and Design page is a link to Case Study 1 and Video 1

<sup>2</sup> Within Marketing and Insight Recruitment page is a link to Video 10

<sup>3</sup> See External Partners link in Curriculum and Pedagogy ([www.sheffield.ac.uk/lets/pgttoolkit/curriculum-pedagogy/external](http://www.sheffield.ac.uk/lets/pgttoolkit/curriculum-pedagogy/external))

<sup>4</sup> Includes a link to a Student Facebook page, eMentoring and the Make it Count initiative.



# Postgraduate Advantage Scheme Case Study

Jordan Creed  
Politics  
Research Intern  
Campaign for Better Transport



#### Context

I did my internship with the Campaign for Public Transport. The organisation seeks to lobby government to invest in public transport and develops research on the dangers of air pollution from increased car travel. They have recently produced reports on the cuts to local bus services by councils during the period of 2010-2015.

#### Background research

The research project that I contributed to was entitled Transport Deserts. My task was to develop the project's methodology and to identify case studies. The first step was to do background research on the Beeching cuts to train services in the 1960s and 1970s, as well as general research relating to public transport. This was important for two reasons – firstly, to gain an understanding of the arguments that are made in favour of not cutting local transport links, as this helped me understand how something can be perceived as a transport desert to certain social groups and not to others. Secondly, reading about the Beeching cuts gave me an understanding of the process whereby the bus services which replaced trains have in turn been the subject of local council funding cuts.

#### Selection Criteria

I decided that it would be best to first identify 10 potential places that could be defined as a transport desert by having some relatively light qualifiers. This included being:

- at least five miles away from a major train station and having cuts to bus services
- a town of 10,000 or more, as I felt that if I was to include places below 10,000 it would undermine the relevance of the research project and therefore decided to only utilise these places as the case studies for the research project.

#### Case studies

I sought to identify these case studies by looking up local paper stories about bus cuts and then looking at bus timetables. I would see if the place had a train station that was cut during Beeching time or, if it did have a train service, it would be one that would be relatively poor, because of the additional cuts to rail links. One example of this is in Aberystwyth where, in order to get a train to either Bangor or Cardiff, you need to get a train to Shrewsbury first. This is a consequence of the Beeching cuts to smaller railways, making the journey extremely impractical.

#### Outcomes

I developed a methodology that defined a 'transport desert' on a scale. This is because some places would be perceived as a transport desert to some social groups, while some places would not. One example of this is Whitby which has bus services to evening times and morning. While this would not be seen as a problem to pensioners it would to those that enjoy nightlife or seek to work somewhere that requires irregular hours. This resulted in me eventually developing a methodology for the research project that was praised by the others. They will seek to finish the project at the end of this year.

# Postgraduate + Advantage Scheme



124 bursaries  
of £1000 awarded across, and funded  
by, the Faculty of Social Sciences



Participants were 45% Home/EU  
students and 55% International  
students

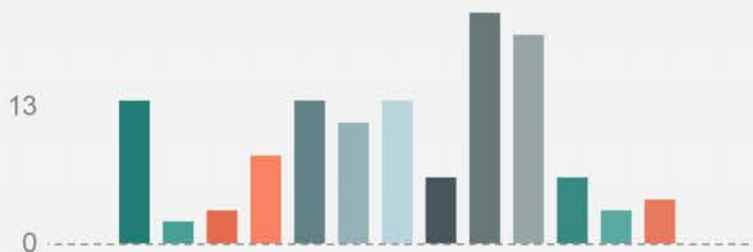


78 self sourced  
46 advertised through myVacancies



Internships were 100 hours in  
length

25



Number of  
participating students  
from each  
department



"I have a well-developed understanding and appreciation of marketing and events management, not from the comfort of my desk writing articles, but by engaging with customers, artists and using new technological algorithmic-based programmes."

Chineme Valerie Ene,  
Department of Journalism,  
PAS Intern at Party for the People

"Thank you very much for providing me with this internship. The experience that I have gained is priceless"

Adam Chan,  
Management School,  
PAS Intern at Talking  
Heads

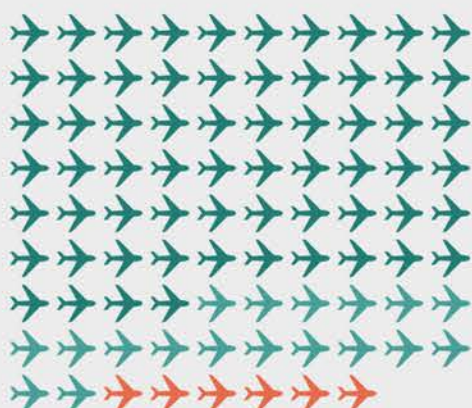




## Participating organisations by type

"The PAS experience has been one of the most positive experiences of a student we have ever had. Our graduate is fantastic and we feel that both ourselves and our intern have gained greatly".

Rachel McLafferty  
Sheffield Mencap and  
Gateway PAS Host



Sheffield UK Worldwide

The majority of PAS Internships were undertaken in the Sheffield area, the remainder took place elsewhere in the UK and in overseas locations such as Belize, Tanzania and Nepal.



The University  
Of  
Sheffield.

## How the Careers Service Can Help You

The University of Sheffield works with businesses, charities and public sector organisations to offer a range of internships, and live projects to students across all of its subject areas. If you would like to be involved, contact the Placement Team:



@uosplacements



placements@sheffield.ac.uk



facebook.com/UoSPlacements

# IAG Progression Framework



# PROGRESSION FRAMEWORK

THIS FRAMEWORK SHARES EXISTING APPROACHES AND PRACTICES TO ESTABLISH AN UNDERSTANDING OF THE ELEMENTS EFFECTIVE IN HELPING MAXIMISE PROGRESSION TO, AND SUCCESS IN, MASTERS STUDY FOR STUDENTS FROM UNDER-REPRESENTED GROUPS

## UNDERSTANDING UNDER-REPRESENTATION AT MASTERS LEVEL

Analysis of data will support understanding of under-representation at Masters level.

- *It is valuable to collate data from a number of years on Postgraduate Taught study (PGT) applicants/acceptors/decliners using criteria known to be relevant for Widening Participation at undergraduate level (e.g. low-participation neighbourhood, low-income background, disability, ethnicity). Additional monitoring questions in your Masters application process may help in collecting data on those who apply but do not progress.*

Raise awareness of the importance of Widening Participation (WP) amongst staff who work with taught postgraduates.

- *Define the institutional strategy and provide briefings and trainings to*

*convey key messages, review progress and share best practice. This is helpful in developing understanding, commitment to and clarity on the approach.*

Targeted and segmented approach to Widening Participation is an important part of addressing under-representation at Masters level.

- *Under-represented groups will experience non-financial and financial barriers and, as a consequence, will have differing Information, Advice and Guidance (IAG) needs. A targeted segmented approach to IAG is recommended. For example: consider how you identify and target undergraduate WP students (in-reach) as well as prospective WP Masters students who are out of education (outreach). Partnership work with external agencies such as Job Centres and employers is an effective way to engage groups not in education.*

**SUMMARY:** progression to Masters study is linked to affordability but also aspiration, choice and pre-conceptions. To aid progression, institutions should first identify their own definition of a WP cohort and target accordingly.

## SUPPORTING PROGRESSION TO MASTERS STUDY

Utilise the HEFCE guidance 'What information do prospective postgraduate taught students need?'

- *Available at [www.hefce.ac.uk](http://www.hefce.ac.uk).*

Advice and guidance is important in making informed choices.

- *Advice and guidance from a range of sources (including university staff, alumni, employers) was highly valued and helps to develop understanding of the benefits alongside confidence. Examples of useful information and advice include: career outcomes, course content and alumni destination data. Advice and guidance should be available over a sustained period and could include further study*

*options, with collaboration between different subject areas to provide a comprehensive offer.*

Confidence and concerns about academic demands are key barriers.

- *Students who meet the entry requirements can still have concerns about fitting in or coping with study. Sustained engagement providing the opportunity to engage in IAG in a range of settings is recommended. Examples include: opportunity to meet with current Masters students/alumni and academic staff in an informal setting; use of case studies/personal stories, particularly focusing on the experiences of students from under-represented groups.*

**SUMMARY:** Early interventions are key, and multichannel sources are valued. Face to face interactions and outreach/in-reach are as important as information.

## ON-COURSE SUPPORT

Encouraging the development of social and cultural capital remains vital.

- *It is beneficial to consider the way in which on-course IAG continues for under-represented groups across the institution. A tailored approach may include sign-posting or development of bespoke careers advice, networking events, study/employability workshops and work placement/internships.*

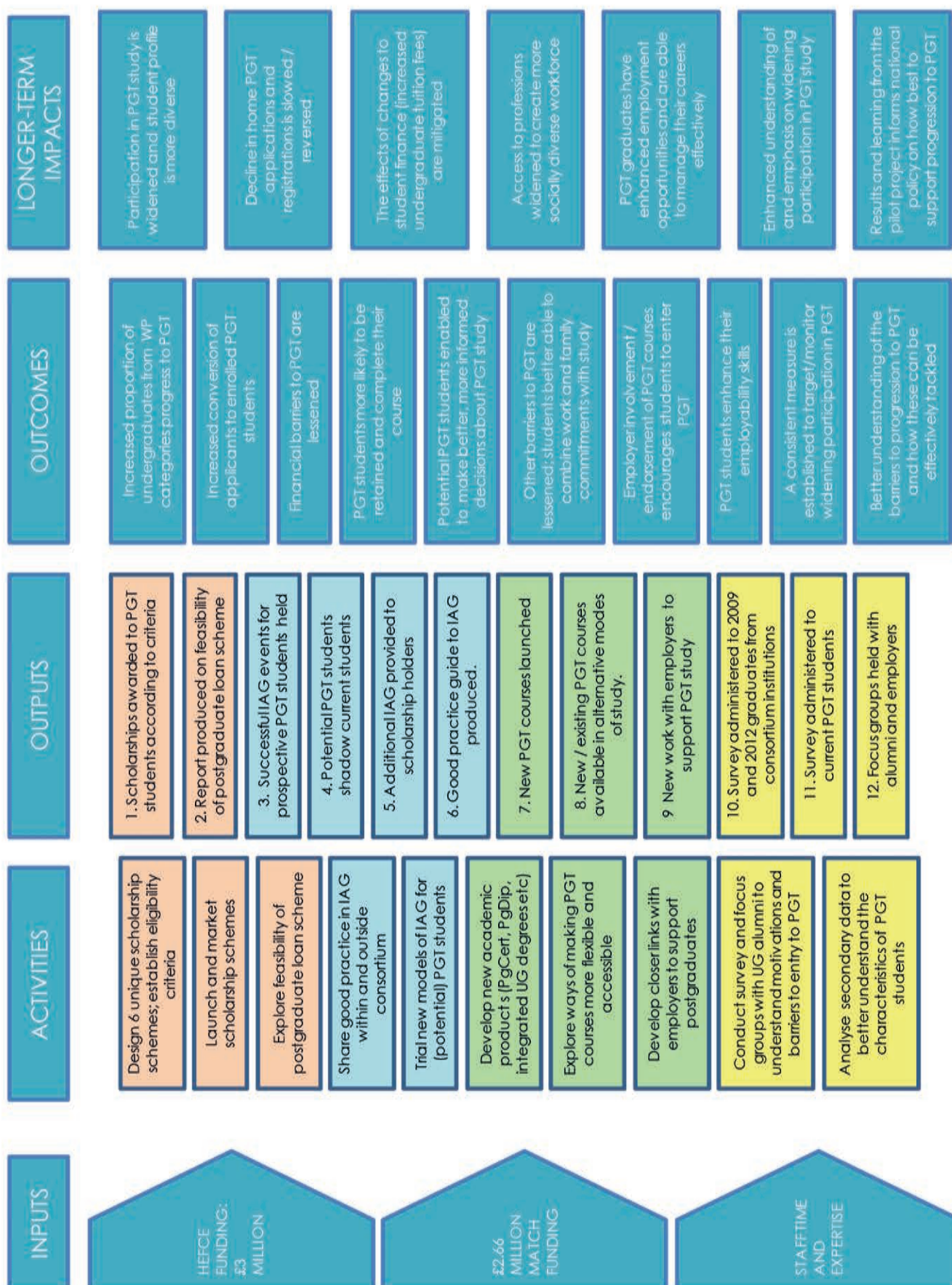
Students from under-represented groups may face barriers in actively engaging in opportunities/support beyond their course.

- *Consider the institutional approach to identifying the needs of under-represented groups and how they access support services such as study skills and disability services.*
- *It is useful to consider the reasons for non-engagement and this may include lack of confidence, levels of understanding of the benefits or issues with the model/format of delivery.*

**SUMMARY:** successful completion of undergraduate study does not guarantee instant understanding of the requirements of, or confidence in, undertaking Masters study. Formal and informal IAG remains important.



# Independent Project Evaluation Logic Chain



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