

Access Agreement for Loughborough University

1. Background and Context

Loughborough University's mission is:

- To increase knowledge and understanding through research which is internationally recognised
- To provide a high quality international educational experience with wide opportunities for students from diverse backgrounds which prepares our graduates for the global workplace
- To influence the economic and social development of individuals, business, professions and communities

We want our students to reach their full potential regardless of their background before joining the University. It follows that we are committed to ensuring that finance and low aspirations do not present barriers to admission to Loughborough and progression whilst studying with us. However, we need to secure sufficient resources to maintain the high standard of the student experience which we offer in partnership with Loughborough Students' Union.

The University is located adjacent to Loughborough, a prominent high-technology centre for the East Midlands, on an impressive 433 acre campus which is one of the largest in the UK. Our undergraduate degree programmes, many of which have been developed in partnership with employers, are characterised by a combination of relevance to employment and research-led teaching. The majority of courses offer a sandwich year opportunity enabling students to develop their employability skills further. Where applicable to the discipline, our degrees have received accreditation from the relevant professional body. The nature of many of our courses means that prior knowledge in certain subjects, e.g. mathematics or science, is often required for admission. Our teaching quality is rated amongst the highest nationally and the Loughborough student experience has been rated the best in the UK for the last five years by the Times Higher Education magazine. We also have outstanding records for the retention and employability of our students.

The University's location and the distinctive nature of its degree programmes have resulted in an undergraduate student body that is predominately full-time, the majority of whom are young and living away from home. We recruit nationally, with significant numbers of students from across all parts of the United Kingdom. Loughborough is proud of its record for the admission of students from under-represented groups but we recognise that there is scope for further progress in some areas. We face significant challenges in making this progress given the geographical factors and our subject mix.

2. Fee Limits and Fee Income above £6,000

We plan to charge the following annual fees for full-time UK/EU entrants in 2012/13:

All undergraduate programmes	£9,000
Science and Engineering Foundation Studies Programme (currently HEFCE-funded)	£9,000
Sandwich placement or year abroad	We have decided to charge less than £3,000 for this type of year of study and aim to agree the actual amount, which will be between £800 and £1,800, no later than July 2011 so the information will be available for 2012 entrants with the main fee tuition fee information

The above fees will be increased each year for all relevant students in line with the government approved inflation factor.

Details of the number of entrants expected to pay these fees are provided in Annex B.

3. Expenditure on Additional Access and Retention Measures

3.1 Assessment of Access Performance to Date

As requested by OFFA, we have assessed our performance in the key HESA widening participation indicators in absolute terms and in relation to performance against our benchmarks (location adjusted). We have done this considering entrants in the four intake years from 2006-2009, who will be predominately under the current fee regime.

HESA PI	Absolute terms	Against Benchmark
Young Entrants – state schools and colleges	Performance largely unchanged, range 81.6% to 82.8%	Difference from benchmark is statistically significant and negative. However, gap between performance and benchmark has narrowed steadily from 4.1% to 3.0% over the period.
Young entrants – NS-SEC 4-7	Performance has improved steadily from 21.7% to 23.2%	Difference from benchmark is statistically significant and negative. However, gap between performance and benchmark has more than halved from 5.5% to 2.3% over the period.

Young entrants – Low Participation Neighbourhoods (POLAR 2)	Performance unchanged overall although varies over the time period	Difference from benchmark is not statistically significant over most of period. Overall some improvement as gap from this benchmark has fallen from 2.8% to 2.2% over the period.
Mature entrants – No previous HE and from Low Participation Neighbourhoods	Our mature intake is around 5% of the total so these figures are subject to variation due to small numbers. Overall, performance has improved from 10.0% being from the disadvantaged group to 13.2% over the time period.	Difference from benchmark is not statistically significant over most of period. Overall gap between performance and benchmark has been narrowed from 4.8% to 2.2% over the period.
Retention Indicators – young entrants	Our performance is very good overall and ranges from 2.0 % to 4.6% over the time period.	In all years we perform better than the benchmark.
Retention Indicators – mature entrants	Our performance is very good overall and ranges from 2.8% to 11.7% over the time period although there is fluctuation due to the small number of students involved.	In all years we perform better than the benchmark. This is statistically significant in two of the years.
Students in Receipt of Disabled Student Allowance (DSA)	Performance has improved steadily over time period from 4.8% to 6%.	In all years, we perform better than benchmark. The positive gap has increased from 0.4% to 1.4% above the benchmark.

We have also assessed our performance in relation to the HEFCE Widening Participation funding allocations. We are ranked in the top half of Higher Education Institutions in terms of the allocation we receive for both widening participation and teaching enhancement and success. We compare very favourably with institutions with a similar profile of students and subject mix.

3.2 Planned Expenditure on Additional Access and Retention Measures

The above analysis suggests that, overall we have been making good progress on widening access to Loughborough but there is scope for further progress with access for students from less advantaged groups. Our retention record is excellent but the small decline in the most recent year suggests we need to avoid complacency.

We have therefore concluded that we should aim to spend around 27% of our fee income above £6,000 on access and retention measures.

This represents approximately £2.5m in total in 2012/13 of which £1.7m or 70% will be on financial support for students with the remainder being on outreach, fair access and retention initiatives. By 2015/16, the required total expenditure is around £7.6m.

4. Additional Access Measures

4.1 Outreach and Fair Access

Outreach work at Loughborough is delivered through a partnership between the central student outreach and recruitment team, academic and student support departments and Loughborough Students' Union.

In reviewing our activities in preparation for this Agreement, we have identified opportunities to develop our approach through a more explicit structuring of activities by purpose:

- General achievement and aspiration-raising work with years 7 to 11
- Information, advice and guidance on subject choice and progression opportunities for young people in schools and colleges, particularly in years 9 and 11
- Fair access work with years 12 and 13 including the use of contextual information

We will continue to use our distinctiveness and academic strength to inform our outreach work. We will aim to increase achievement and interest in mathematics, science and engineering as well as providing additional mathematics support for our current students. We will use our unique reputation and facilities for sport to promote the attractiveness of higher education.

General Achievement and Aspiration Raising Work with Years 7 to 11

Local Collaboration - At present much of the work we undertake with this objective is delivered through Leicestershire Aimhigher and we are committed to seeing this continue. The three local Leicester and Leicestershire HEIs (The University of Leicester, Loughborough University and De Montfort University) are working together and are in discussions with representatives from the two local authorities (Leicester City and Leicestershire) and leaders from local schools and colleges to form a partnership which will co-ordinate a programme of engagements for identified, targeted cohorts of year 7 to 11 pupils from local schools and colleges.

This would include a range of general aspiration raising activities to promote achievement and highlight the benefits of higher education including University Experience days, general student life sessions, academic taster sessions, links with current students as well as visits from University staff and students to schools and colleges.

In financial terms, we expect to commit from 2011/12 a similar level of expenditure on these activities from our own funding to that which we have previously received from Leicestershire Aimhigher (£41,000 annually).

In addition we are discussing with relevant partners, how best to continue the monitoring and evaluation work for Leicester and Leicestershire that has been provided at regional level at Loughborough University through Aimhigher in the East Midlands.

This would represent a further financial commitment from University funds for 2011/12 as well as continued willingness to host the service at Loughborough for a number of East Midlands universities.

Information, advice and guidance on subject choice for young people in schools and colleges, particularly in years 9 and 11

We currently undertake some work of this nature through our programme of visits to schools and colleges; at present with most emphasis on year 11. As we continue to develop our access activities, we intend to review with our partners in the school and college sector how we might contribute further in this area.

The University will work with teachers and careers advisors as well as with prospective students to ensure that they have the most up to date information to assist in making decisions regarding study and progression options.

We will also be assessing the feasibility of developing a scheme similar to the Aimhigher Associates scheme which will enable Loughborough students to provide information, advice, guidance and support to young people in local schools and colleges and to thereby raise achievement and aspiration.

Fair Access work with years 12 and 13 including the use of Contextual Information

Whilst we have long standing and close relationships with a number of schools and colleges, both locally and nationally, we have not to date established any specific partnerships which contribute to admissions decisions in relation to applicants from disadvantaged backgrounds. We therefore plan to examine the options for development of a scheme of this kind for selected schools nationally and locally, including an Access to Loughborough scheme. This scheme will complement use of the contextual data to be provided in future with UCAS applications.

We do not currently make extensive use of contextual data during the application process to inform our decision-making on applicants. As part of our preparation for this Agreement, we have reviewed data on the characteristics of our applicants and students by subject area. This shows that for our programmes with very high offer levels (e.g. Sports Science, Aeronautical Engineering), students from Low Participation Neighbourhoods (LPN, one of the HESA PIs) tend to be less likely to receive an offer than average. However, of those who do receive offers, the conversion rate to accepted student is very similar to the average. We can identify these individuals during the admissions process from their home postcode which gives us the opportunity to consider their potential and the circumstances surrounding their predicted achievement to see whether they should receive an offer and if so, at what level that offer should be.

We cannot identify individuals based on the social class category used for the key HESA widening participation PI during the application process. The data for LPN is also more complete and reliable than the social class data and our analysis shows that for Loughborough registered students there is a reasonable, but not perfect, correlation with low income. We therefore propose to focus the core of our outreach and fair access initiatives around the LPN group and to use it as a key indicator in the development of a new fair access policy, targets and milestones.

4.2 Student retention and success

Although our retention rates are good both for young and mature entrants from low participation neighbourhoods, we are aware that we cannot be complacent, particularly given the increased fees and increased pressures which may be placed on such students. We are therefore considering a range of proposals to support students from low participation neighbourhoods during their studies to aid retention and promote success. This should ensure that, whilst increasing our overall participation of students from low participation neighbourhoods, we do not lower their retention rates or affect the success of such students. These measures include the following:

- Placement and employability support to ensure that students from disadvantaged backgrounds have access to placements and other forms of work experience to enhance their employability and access to the professions where appropriate
- Additional mathematics support
- Additional academic language and writing skills support
- Departmental mentoring scheme to aid retention, building on our successful scheme already in place for mature students
- Support for the transition to University

4.3 Financial support for students (including National Scholarship Programme)

The objectives of our current financial support scheme are as follows:

- To minimise the financial barriers to entry to and progression at Loughborough
- To ensure we retain the proportion of students we currently recruit from under-represented socio-economic groups and low participation neighbourhoods
- To help us to increase the proportion of students from these under-represented groups bearing in mind that significant growth in our undergraduate population is not planned
- To aim for a small increase in the existing proportion of mature students amongst our undergraduates

We believe that these aims remain valid in the new funding environment.

As part of our preparations for this Agreement, we have reviewed the degree of financial hardship at Loughborough and attitudes to our current bursary scheme with our Students' Union and our financial advice staff. We examined information on the issues which students bring to the financial advisers and applications to our hardship fund. The Students' Union undertook a focus group for us with students holding bursaries. As noted in the introduction, Loughborough's location and subject mix mean that its student population is dominated by young students living away from home. The intensive nature of teaching in science and engineering, as well as our students' high levels of participation in sport and other activities, mean that it is particularly important that they are able to live on or close to the campus rather than commuting from local towns and cities. Accommodation costs are therefore potentially a major deterrent to choosing Loughborough and a potential source of financial hardship for those who accept a place here. Our Students' Union reports that living a significant distance from the University typically has a negative impact on the student experience. It also reports that the greatest concern of students is their current living costs, not their future debt for tuition fees and maintenance.

The University has responded to concerns raised by the Students' Union about the need to provide low budget accommodation to ensure that all students can benefit from the Loughborough experience. It has already invested £4.6 million to provide low cost rooms on campus and is developing plans to provide another 500 rooms of this type. This demonstrates our commitment to increasing numbers of students from disadvantaged backgrounds.

On the basis of the evidence from these sources, we have concluded that low income students, in general, are just coping with the financial demands of student life but for many there are already financial barriers to full access to the clubs, societies and sporting activities which contribute to our outstanding student experience and to the high levels of employability of our students. We therefore take the view that, within the constraints presented by the National Scholarship Programme, we should aim to maintain the financial support for living costs we provide to our students at around the current levels, and provide a modest increase for those on the lowest incomes. As a consequence, we have prioritised accommodation discounts and bursaries for our expenditure, although we do propose tuition fee waivers as well for our National Scholarship Programme students. We note in this context that, since Loughborough has very few part-time undergraduate students, our students will be accessing very little of the new public funding to be allocated to the SLC for this group in comparison with most other HEIs.

In line with the objective of our current bursary scheme to support the delivery of our access targets (see section 5) and protect the quality of the Loughborough Student Experience, we therefore propose to offer the following financial support for low income students entering in 2012/13 in each year of their studies, inflated each year if appropriate:

Annual Residual Income	Financial Package
£18,000 and under	Year 1 – National Scholarship £1,000 bursary £1,000 Accommodation Discount* £1,000 Tuition Fee waiver Year 2 onwards – Loughborough Scholarship £2,000 bursary £1,000 Tuition Fee waiver
£18,001- £22,000	All Years of Study £1,000 bursary £1,000 Accommodation Discount*
£22,001- £25,000	All Years of Study £1,000 bursary
£25,001- £32,000	All Years of Study £500 bursary
Mature Students	Bursaries above to be doubled
Care Leavers	Additional £1,500 bursary per year and additional £3,000 fee waiver per year

Science and Engineering Foundation Studies	Reduce cost to £4,000 for Foundation Year for all students with a household income of £18,000 or under with a fee waiver
Part D (final year) of integrated masters courses	Reduce cost of final year to £4,000 for all students with a household income of £18,000 or under with a fee waiver; £5,000 for household income between £18,001 and £22,000 and £6,000 for household income between £22,001 and £25,000
Placement year	Offer a full fee waiver for all students with a household income of £18,000 or under

*will normally default to a tuition fee waiver if the option of University-run accommodation is not taken

These proposals are based on the following additional assumptions:

- The scheme should be simple to explain to applicants and to administer
- To support achievement of our targets and milestones we want to direct funding to students from Low Participation Neighbourhoods (see section 5) – our data currently suggests there is a reasonable, though not perfect, correlation between household incomes and origin from an LPN

We will keep the income thresholds under review in light of the development of the National Scholarship Programme and trends in student recruitment and family incomes. Estimates for 2013/14 onwards, based on current assumptions, are set out in Annex B.

The financial support packages will not be payable in the sandwich year, if taken, and students from the Channel Islands and Isle of Man will not be eligible. Only students from England will be eligible for the National Scholarship Programme. As now, we will use information derived from SLC assessments of income to determine eligibility. Bursary elements will be paid by BACS transfer into student bank accounts through the HEBSS system.

The University will continue its non means-tested care leaver's bursary for non-mature students, additional to its standard bursary scheme. The care leaver's award amounts to an additional £1,500 for each year of study apart from a sandwich placement year in which there is no award. The award made to a student in his/her first year of study consists of £750 from the University and £750 from Buttle UK. In subsequent years, the total cost will be met by the University.

At present we offer merit-based entry scholarships for particularly able students in a number of science and engineering subject areas and expect these to continue to be available for 2012 entrants. However we will review whether these should continue from 2013. We are also exploring opportunities for external sponsorship from a number of employers and charities. Some of these developments may be directly targeted at disadvantaged students and we may wish to include them in revisions to this Agreement.

5. Targets and Milestones

Our targets and milestones have been set bearing in mind our strategy for outreach and fair access outlined in section 4.1. As noted above, we believe we should focus our fair access initiatives primarily around low participation neighbourhoods as the data relating to these is more reliable than that on social class and it can also be used during the admissions process. This approach will ensure we are targeting state school pupils from less advantaged backgrounds. We have therefore chosen not to include the proportion of state school pupils and the NS-SEC indicators specifically within our targets and milestones although we anticipate our approach should improve our performance on these PIs.

Our overall aim is to maintain our excellent track record on student retention whilst admitting increasing proportions of students from more disadvantaged backgrounds and we have therefore included relevant targets and milestones for the retention PIs.

For our own applications data 2010/11 has been taken as the baseline and for the HESA PIs the baseline year is 2009/10 as these are the most recent years for which data is available. The retention data refers to the 2008 intake year and whether they were still registered in 2009/10.

(i) Young full-time first degree entrants from low participation neighbourhoods

We aim to focus our outreach and fair access activities for young first degree entrants on those from low participation neighbourhoods.

Indicator	2009-10 Intake (Actual)	10-11 Intake (Actual)	2012-13 Intake	2013-14 Intake	2014-15 Intake	2015-16 Intake	2016-17 Intake
% of total applications (own data)		6.6%	6.7%	6.8%	6.9%	7%	7.1%
% of applicants receiving offers (own data)		57.5%	59%	60%	62%	65%	68%
% students from low participation neighbourhoods (HESA PI)	5.5%		5.6%	5.7%	5.8%	5.9%	6.0%
Non-continuation of students from low participation neighbourhoods (HESA PI) – previous cohort	4.1%		4.1%	4.1%	4.1%	4.1%	4.1%

(ii) Mature full-time first degree entrants from low participation neighbourhoods

We continue to regard mature students as a key target for our access work given the low proportion of students from this group at Loughborough. However, we propose to increase the targeting of our approach to this group to ensure we are focussing on individuals who are likely to have experienced disadvantage.

Indicator	2009-10 Intake (Actual)	2012-13 Intake	2013-14 Intake	2014-15 Intake	2015-16 Intake	2016-17 Intake
% of students with no experience of HE and from low participation neighbourhoods – rolling three year average (HESA PI)	11.9%	12.0%	12.1%	12.2%	12.3%	12.4%
Retention of students with no experience of HE – rolling three year average (HESA PI)	5.7%	5.7%	5.7%	5.7%	5.7%	5.7%

(iii) Students in receipt of Disabled Students Allowance (DSA)

We aim to continue to maintain our high proportion of students in receipt of the Disabled Students Allowance.

Indicator	2009-10 Intake (Actual)	2012-13 Intake	2013-14 Intake	2014-15 Intake	2015-16 Intake	2016-17 Intake
% in receipt of Disabled Students Allowance	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%

(iv) Interaction with schools and colleges

We aim to focus interaction with schools and colleges in three areas with a milestone for each one.

Indicator	2009-10 Intake (Actual)	2012-13 Intake	2013-14 Intake	2014-15 Intake	2015-16 Intake	2016-17 Intake
Number of local schools and colleges with whom we interact as part of the local WP partnership	20	21	22	23	24	25

Number of local schools and colleges with whom we have multiple interactions (more than 2)	4	5	6	7	8	9
Number of under-performing schools and colleges/ schools and colleges in low participation neighbourhoods with whom we develop a specific programme of interactions	0	2	3	5	7	10

(v) Local collaboration

We propose a further immediate target, shared with the other two Leicestershire HEIs, on which we intend to build in future years:

To secure agreement during 2011-12 for a local Leicester/Leicestershire partnership between the three HEIs, the local authority, local schools and colleges and other appropriate agencies to deliver aspiration raising and widening participation activities to the local area, and to monitor progression to HE in the region.

(vi) Possible other considerations

During 2012/13 we propose to review our work with students from ethnic minorities to ensure that our efforts are appropriately targeted. We will then consider the addition of an appropriate milestone.

6. Monitoring and Evaluation Arrangements

Measurement of Impact

A variety of approaches are used to measure the impact of our outreach work, including the following:

- Evaluations are conducted following each new event. Recommendations and comments are taken on board for the review of current activities and development of future activities.
- Establishing a series of events will allow direct follow-up with students and their teachers. The continued work will also allow pre- and post-event evaluations to be undertaken and some level of measurement of the impact on opinions and knowledge of further and higher education.

- Tracking of students is taking place. Data on the students attending events is being collected (subject to data protection regulations) and their progress throughout the educational system is being monitored and, as noted above, we are planning to continue and develop further the data analysis services currently provided through Aimhigher in the East Midlands.
- Monitoring through the University's own data will be expanded, focusing on admissions, progression and retention issues.
- We plan to monitor the effectiveness of our financial support package through questionnaires and focus groups with prospective applicants, applicants, teachers and current students, in partnership with our Students' Union.
- We will also continue to monitor our progress against our milestones and to review our activities in the light of this.

Compliance with our Access Agreement forms part of our Risk Management Framework which is overseen by the University's Audit Committee. Regular internal monitoring of the delivery and impact of outreach and fair access initiatives will be undertaken by our Recruitment and Outreach Strategy Group which will be accountable to our Operations Committee and Finance Committee.

Progress reports will also be made at least annually to our Senate and Council including direct monitoring of our targets and milestones as part of Council's Key Performance Indicators (KPIs) set for the University. Work is currently being undertaken on our institutional level KPIs to develop equivalent KPIs at School (academic unit) level to support effective delivery of our objectives.

7. Provision of Information to Applicants

The University recognises the need to continue to develop its financial guidance, support and administration arrangements for prospective and current students. We already provide face-to-face advice through our programme of visits to schools and colleges and at our Open Days. As part of the expansion of our outreach work we plan to develop this work further. We also intend to work in close partnership with our Students' Union to expand our existing initiatives to help current students use their money wisely.

We aim to provide clear, comprehensive information in both printed and electronic form covering:

- Total tuition costs for prospective students
- Estimated study and living costs, including sample budgets
- A comprehensive summary of the National Scholarship Programme and University support including bursaries, scholarships, sponsorship and hardship funds including eligibility criteria, application process etc
- A summary of state support with cross references (e.g. to DfE, Student Finance England websites etc)
- References to other possible sources of income, e.g. employment (including our own outreach activities, see Section 4.1), charitable trusts etc.

The material we currently have is illustrated with case studies and tailored versions have been created for prospective students and parents. It is integrated with current outreach and recruitment information and is used pro-actively in central and departmental outreach, student recruitment and admissions activities.

In addition to the creation of web and paper-based information materials, we also provide accessible, confidential advice for individual prospective and current students through the student's choice of medium (telephone, email, face-to face).

The University has purchased the full services of the Student Loans Company (SLC) to determine the value of means-tested awards and to make payments into student bank accounts through the HEBSS system. We liaise closely with the SLC in the operation of this process.

This Agreement was approved on behalf of Council by its Chair on 18 April 2011.