

University of Bristol - Access Agreement 2014 Entry

1. Background

The University developed its first Access Agreement in 2005. Subsequent revisions reflected a review of our student finance package, in the light of experience in the first year of operation, a comprehensive review of long-term measurement of widening participation and changes to the government grant package. The new financial environment in 2012/13 necessitated a more fundamental review, the outcomes of which were reflected in our 2012 Access Agreement. Plans were further refined in response to significant environmental changes and our own plans for student number growth and outcomes were reflected in our 2013 Agreement.

During the last year, the University's Widening Participation strategy, which provides the strategic framework within which our Access Agreement commitments sit, has been reviewed and updated. The new strategy has informed development of the 2014 Agreement. In particular, it confirms our commitment to building an evidence base for activities through our widening participation research cluster, which is has recently commissioned several new studies (see para 7) and prioritises expansion of those interventions which have proved most successful in attracting/converting applicants from under-represented groups - notably the *Access to Bristol* and *Realising Opportunities* schemes; the personal adviser initiative and peer mentoring (see para 5.1). It also commits us to assessing potential for new initiatives supporting progression to employment/postgraduate study and delivery of outreach activity within a wider range of community settings.

Our Students' Union sabbatical team have contributed to the development of both documents, directly and through membership of relevant university committees and we are in discussion with the sabbatical team, with a view to agreeing a framework for on-going engagement in future years. (see **Appendix One**).

In parallel with the arrangements for 2014/15 described here, we will continue to honour financial commitments to students admitted on financial support packages described in previous Access Agreements.

2. Context

The University of Bristol's Access Agreement is founded on a two-fold commitment to:

- Sustained enhancement of the educational experience of our students.
- Widening participation in Higher Education in general and to Bristol in particular.

The University has an ambitious Education Strategy, which aims to provide a world-class educational experience based on excellent teaching and state-of-the-art facilities and student services. Undergraduate fee income plays an important part in sustaining and enhancing the quality of this experience.

At the same time, we are committed to having a student body that is diverse in terms of background and experience, with all the cultural and educational benefits that this brings. This commitment is reflected in a longstanding and active programme of widening participation. Our first widening participation strategy was published in 1999 and our fourth (updated in 2013 to ensure on-going relevance to a changing environment) covers the period 2009-16, driving a wide range of initiatives, including plans for collaborative projects, long-term aspiration- and attainment-raising and actions to diversify Bristol's student population more specifically.

3. Tuition Fees

With effect from 2012, the University of Bristol intends to charge an annual tuition fee of £9,000 (increasing annually in line with inflation, where permitted) for all UK and EU students on full-time undergraduate programmes and full-time PGCE programmes.

Tuition fees for UK and EU students studying on a part-time basis will be calculated on a pro-rata basis, using the £9,000 fee as the full-time equivalent rate. In practice, the maximum annual fee charged to any part-time student as a result of this will be £4,500.

The following exceptions to this will apply:

- Students who are entitled to a fee waiver as part of our student finance package (see para 5.3).

- Students undertaking a year of study abroad or an industrial work placement, during which a tuition fee of £1350 p.a. and £1800 p.a. respectively will be payable¹.

It is anticipated that undergraduate tuition fees will generate 'additional' income above the basic fee of c.£37.2 million² in 2014/15, rising to £39.4 million by 2016/17 (steady state)(Set in the context of significant loss of government teaching grant and capital funding) An increasing amount will be re-invested in student financial support and other measures underpinning our widening participation strategy (See **Appendix two**).

4. Expenditure on Additional Access Measures

In 2014/15, The University of Bristol will invest 31.3% of its additional fee income in additional access measures, to include: financial support for students from low income backgrounds and a comprehensive programme of activities to support outreach and retention of students from under-represented groups.

4.1 Assessment of Access and Retention Record

The University of Bristol is a highly selective, research-intensive University. For entry in October 2012, we received an average of 9 home applications for every place (with some programmes receiving over 30 applications per place). The average UCAS tariff score of our 2012 entrants was 479.6 (the equivalent of 4 A grade 'A' Level passes). By contrast, average secondary attainment in the Bristol area is among the poorest in England, with an average NQF/QCF tariff score of 677.7 per student (the equivalent of 3.2 C grade 'A' Level passes), compared with the English average of 754.4 per student³ (NB the UCAS tariff and NQF/QCF tariffs are not calculated on the same basis so cannot be directly compared with each other⁴).

A feasibility study, undertaken by *IntoUniversity* in October 2011 noted that:

- Bristol has 39 LSOAs (Lower Super Output Areas) in the most deprived 10% nationally. Of these, 14 are in the most deprived 3% and 4 in the most deprived 1%.
- In the sub-domain of children and young people, 82 Bristol LSOAs fall within the most deprived 10% nationally in the domain of Education, Skills and Training deprivation. Of these, 17 are in the most deprived 100 areas in England and Illminster Avenue West in Filwood is the most deprived in England.
- Of England's core cities, Bristol has the second lowest proportion of low income children progressing to higher education.
- Black and minority ethnic pupils, those children with free school meal eligibility and pupils with English as an alternative language under-perform at all levels in Bristol.
- In 2008, it was established that around 21,900 (27%) children live in poverty in Bristol. In Lawrence Hill, this rises to almost 60% - the bottom percentile of all wards nationally.

Beyond the Bristol area, the University draws students primarily from the south of England, where average income levels are relatively high. A predominantly traditional subject portfolio also has some impact on attractiveness of programmes to widening participation students.

These characteristics create some very specific challenges when it comes to diversifying our own undergraduate intake (as opposed to playing our part in raising student aspirations and widening participation in Higher Education more generally). These involve culture and perceptions as well as finance and economics. The former are slower to change and less easy to control than the latter.

Given this context, the University of Bristol's strategy for Widening Participation has been deliberately built around a combination of aspiration- and attainment-raising activity in local schools (often undertaken in collaboration with other local HE providers and designed primarily to widen participation in the Higher Education sector generally); more targeted activities, designed to attract the most able students to Bristol and a contextualised approach to admissions, which ensures that poor school performance is taken into account when selection decisions are made. Despite this comprehensive and well-established approach, the University of Bristol has had only limited success in realising its ambitions to widen participation and currently falls significantly short of the majority of its HESA benchmarks. (For detailed data, see **Appendix Three**.)

¹ Where a year of study abroad is a fully integrated part of a programme of study, we wish to be able to charge the full fee of £9,000 p.a.

² £3.5m from students progressing under the current system and £33.7m from students entering the University under the new system

³ DFE 2012 Performance Tables: <http://www.education.gov.uk/cgi-in/schools/performance/group.pl?qttype=LA&no=801&supervise=sec>

⁴ The UCAS tariff attributes a value of 120 points to a grade A at 'A' level, whereas the NQF/QCF tariff attributes a value of 270 points to a grade A.

Using the University's own application and intake measures⁵ to analyse performance over the five year period from 2008/09 to 2012/13, the proportion of undergraduate applications from under-represented groups has increased in four categories (low participation neighbourhoods, mature, disabled, local) with the proportion of applications from all other groups (students from low performing schools; socio-economic groups 4-7, minority ethnic students) declining.

Over the same period, progress in diversifying intake has followed a similar pattern, with small improvements in only four areas (low participation neighbourhoods, minority ethnic, disabled, local). The proportion of mature students and those from low performing schools and socio-economic groups 4-7 has fallen.

However, a focus on conversion from application to intake has delivered significant success. During the same 5-year period, we have converted increasing proportions from low performing schools; socio economic groups 4-7; low performing neighbourhoods, local postcodes, disabled and minority ethnic groups. The only group not to have increased is mature students where conversion fell from 6.1% to 6% in 2012/13.

The University's track record in the area of undergraduate retention is also substantially better. According to HESA performance indicators, of the students aged under 21 who entered the University in 2009/10, only 2.3% withdrew without completing their programme, against a benchmark of 2.7%. Whilst the completion rates for mature students are not as positive, the same data source indicates that we do outperform our benchmark with a non-continuation rate of 7.6% for this group against a benchmark of 8.3%.

In most respects, our PGCE intake profile is in line with or better than that of comparators⁶ and other local providers. In 2012/13, we recruited a cohort which was 37% male; 63% female (compared with 30% male: 70% female for the comparator group and 27% male: 73% female for local providers). 56% were categorised as 'mature' (compared with 47% of the comparator and 46% of the local group). Our biggest challenges in this area relate to recruitment of minority ethnic students but, since 2011/12 we have succeeded in increasing BME intake by 50%. In 2011/12 non-white students made up only 5% of PGCE intake, while in 2012/13 this has increased to 10% (cf 14% for the benchmark group and 6% to local comparators).

4.2 Expenditure

This assessment of current progress has led us to conclude that substantial investment in additional access measures continues to be called for. In 2014/15, a total of £11.7m will therefore be invested in these measures, rising to £12.3m in 2016/17 (steady state). This represents 31.3% of total income from additional fees. All of this expenditure will be OFFA countable. A high level summary of how this investment will be attributed in steady state is provided in the table below. The amounts quoted will rise annually with inflation (assuming that fee levels also rise to reflect inflation). The balance of investment across different categories has been adjusted for 2014/15 to reflect a revised projection of the costs of our student finance package, informed by actual uptake in 2012/13. It also reflects assessment of current priorities. For example, increasing investment in outreach has been prioritised over supporting retention but we have nevertheless recognised the need for some additional transitional support for students from under-represented groups. This balance will be reviewed in the light of progress. In particular, improved recruitment of students from low income backgrounds has the potential to impact significantly on the cost of our student finance package, which may need to be adjusted in future years. Further detail is provided in **Appendices Two and Four**.

Outreach activities	£2.2m
Progression/retention activities	£0.6m
Student Finance Package	£8.9m
TOTAL REINVESTMENT	£11.7m

5. Additional Access Measures

Additional access measures fall into three main categories:

- Outreach activities
- Progression/retention-related activities
- Student financial support

Our intended approach in each of these areas is described in more detail below:

⁵ The University measures LPN applications and intake on the basis of the lower two POLAR quintiles, while HESA uses only the lowest quintile

⁶ The Institute of Education; University of London and the Universities of Bath; Birmingham; Cambridge; East Anglia; Exeter; Manchester; Nottingham; Oxford; Southampton and Warwick

5.1 Outreach activities

The University of Bristol will increase investment in outreach activities by £1.75m - from £0.85m per annum in 2011/12 to £2.6m per annum by 2016/17 (steady state).

The University of Bristol has an established programme of outreach, working both collaboratively with partner institutions and in our own right to diversify the University of Bristol's student population as well as to widen participation in Higher Education more generally. This included a 7-year period as an active member of the *Aimhigher* West region; involvement in the development of the *Western Access Progression Accord* (WAPA); a comprehensive range of outreach activities targeting students ranging from primary age to mature learners, in formal and informal educational settings and co-sponsorship of the Merchants' Academy in South Bristol.

In 2010/11, we were investing a total of £0.85m p.a. in outreach activities. Transition to a new environment (marked by the introduction of higher tuition fees and by the discontinuation of the *Aimhigher* scheme) provided the opportunity to increase our total investment in this area by £1.75m (to £2.6m by the time we reach steady state in 2016/7) and, at the same time, to review the focus of our outreach programme to ensure that it supports progress in widening participation to the University, as effectively as possible.

In particular, since our 2012 Access Agreement came into effect, we have begun to:

- Expand the *Access to Bristol* scheme, building on its success in improving application to intake conversion rates among participating students. The scheme provides sustained curriculum enrichment for 'A Level students across 15 subject streams, with the law stream forming part of the College of Law's *Pathway to Law* programme. Established by the College of Law and the Sutton Trust, this programme targets students from under-represented backgrounds and provides support throughout years 12 and 13, and beyond into university. In the 2011/12 admissions cycle, 31% of applicants who had participated in the *Access to Bristol* scheme went onto study at the University compared to overall applicant to intake conversion rates of 13%. This success led to a decision to extend a guaranteed offer and an enhanced student funding package to students who have participated in the scheme and we are working to integrate summer school and other Bristol-specific outreach initiatives more fully with these programmes. Work is also underway to explore the possibility of developing a scheme similar to *Pathways to Law* for prospective medical students from currently under-represented groups.
- Embed the *Realising Opportunities* (RO) scheme – a national collaborative partnership of 12 research intensive universities working together to promote fair access and social mobility of students from under-represented groups. The RO programme, of which the University is a founder member, provides support for students through interventions designed to raise aspirations and enable them to demonstrate potential for success at a research intensive university. These interventions are offered both at their local participating university, and nationally. The programme includes a national conference and each student is provided with on-going support and encouragement by a student mentor who is an undergraduate student from one of the 12 universities. Successful completion of RO, which includes a robust academic element, will result in additional consideration for applications through UCAS from all 12 universities, and the potential for an alternative offer worth up to 40 UCAS points from 10 universities, including the University of Bristol. Each of the participating institutions has committed funds to ensure the on-going delivery and development of RO to 2016, with an agreed financial contribution of £42k to support delivery in 2014/15. The Partnership was awarded the Times Higher Education Widening Participation Initiative of the year 2011 and, in October 2012, featured as an example of good practice in Alan Milburn's report *University Challenge: How Higher Education can advance Social Mobility*. For the first time, the Partnership has set a joint target for progression to research intensive universities⁷.
- Increase emphasis on activities designed to support conversion from application to acceptance and then intake. Since its inception in 2007, our personal adviser scheme, which provides targeted support to mature applicants and applicants from schools with low HE progression rates has had a positive impact on conversion. During the period 2007-2009⁸, conversion from offer to intake for target groups rose from 62% to 68% (mature applicants) and from 25% to 31% (applicants from schools with low HE progression rates). Numbers are still stabilising following changes to the basis of targeting and the centralisation of undergraduate selection in 2011/12 but we are optimistic that the scheme will continue to impact conversion and are working to expand the target group. Customer Relationship Management software, introduced during 2011/12, is being harnessed to support this. We have also

⁷ Defined by membership of either the Russell Group or the 1994 Group

⁸ In 2010, the basis on which applicants were targeted was refined, making meaningful comparison for 2010 and 2011 entry difficult. Centralisation of undergraduate selection in 2011/12 temporarily diluted the resource available to support the scheme.

embedded across all programmes contextualised offers to applicants from low-performing schools (in keeping with the outcomes of research undertaken by our Widening Participation Research cluster).

- Assess the feasibility of new progression routes to facilitate access to the University. An Arts Foundation programme will launch in September 2013, targeting those with no formal qualification and returners to education and scoping work in other areas is in its early stages, focusing on progression routes specific to professional programmes (particularly Medicine, Dentistry and Veterinary Science).
- Re-focus collaborative work with other local providers, to better underpin our outreach objectives. This work has included a new programme of summer schools for year 11 students in the local area and an annual Higher Education Advisers' conference (both delivered jointly with the universities of Exeter and Bath); an annual access conference (with the universities of the West of England, Bath and Bath Spa) and a children in care project (with Bath Spa and the University of the West of England).
- Establish regional partnerships through Universities South West (USW), the membership organisation for the 13 Higher Education Institutions in the South West. A cooperative structure has been agreed, with individual universities leading on key areas along with meetings and regional events. The 2014/15 focus will be the role that members might play in information, advice and guidance delivery.
- Seek to improve local educational attainment in partnership with *IntoUniversity* whose programme, already established in London, has an impressive track record (70% of year 13 participants progress to Higher Education compared with a national average of 24% for students receiving free school meals). With the University's support, *IntoUniversity's* Bristol centre opened this year.
- Develop a key stage 2 project for children in primary feeder schools to the University-sponsored Merchants' Academy in South Bristol (an initiative informed by *IntoUniversity's* feasibility study, which showed this to be one of two areas of the city manifesting the highest deprivation and lowest educational attainment) The University has played an active role in the Academy's development from its conception in 2004, providing senior input to the Board of Governors, as well as work placements, outreach and funding for a community-based research project. This commitment will continue as the Academy becomes more established and we will support its development as an 'all-through' school.
- Expand the work of our Widening Participation Research Cluster, to ensure a firm evidence base for our outreach and contextualised admissions activity.
- Introduce new initiatives, designed to support our aim of increasing the number of BME students undertaking a PGCE at the University. Specifically, we are:
 - Building on our existing programme of school-based mentoring and tutoring by increasing both the overall number of mentors/tutors and, where possible given legislative constraints, the proportion of mentors/tutors from BME backgrounds. We also propose to raise the profile of career opportunities in teaching within the group by supplementing the training which all mentors/tutors receive with academic input from the University's Graduate School of Education.
 - Introducing sessions focusing on HE advice and guidance into our Graduate School of Education's existing CPD programme for newly-qualified teachers, offering free places for teachers based in schools meeting widening participation criteria. To achieve this, we will draw on the HE advice and guidance expertise of the University's Undergraduate Recruitment and Widening Participation team as well as the academic staff in the Graduate School of Education.
 - Increasing support for the *Path into Teaching* programme, coordinated by the UWE.

We are also in the early stages of discussion with the Students' Union sabbatical team to assess the potential for linking some of their volunteering activity more closely with the University's outreach strategy.

The interests of groups protected under the Equalities Act 2010 and of care leavers are well catered for within our outreach provision. As we currently perform relatively well against our black and ethnic minority progress measure for applications, outreach currently targets mature learners and students with disabilities.

The University has a dedicated Mature and Part-time students' adviser who is engaged in a wide range of outreach activities including: information sessions to Access students in local and regional Further Education Colleges, contributing to the regional Access Conference and running specific on campus 'drop in' sessions for prospective applicants. Because part-time provision is relatively small-scale and associated fee levels do not require OFFA regulation, we have not detailed specific plans for investment in diversifying part-time intake here. However, existing initiatives include work undertaken in relation to our part-time BA in English Literature and Community Engagement, targeted at local mature students with little or no experience of

higher education. Short courses have been developed with community organisations including the Black Development Agency, the Single Parent Action Network, SILAI for Skills and the Eden House Project, which supports women involved in the criminal justice system. These courses are designed to facilitate progression (7 out of 17 entrants to the part-time BA in 2010/11 had completed a short course). Outreach is also an integral part of the degree programme; each student runs a community project, such as a reading group⁹;

To meet the needs of prospective students with disabilities, the Widening Participation and Undergraduate Recruitment team ensure that all outreach activities are inclusive and accessible. *Access to Bristol* has a significant number of disabled participants and the programme has been adapted to meet specific needs. In response to feedback from applicants, the Disability Services team is in the process of training a team of specialist ambassadors as guides for students with disabilities wishing to visit outside of standard open days.

The University has been awarded the *Buttle UK* Quality Mark for its work with care leavers and is actively involved in the Universities South West programme for those working with children in care and care leavers. A specific outreach programme of aspiration- and attainment activities for care leavers has been developed with the University of the West of England, Bath Spa University and the Virtual School.

A more detailed summary of plans for investment in activity to support outreach, conversion and student success is provided at **Appendix Four**. All expenditure relates to activity which is 'countable' by OFFA. Our widening participation strategy also contains plans for continued improvement of fair admissions procedures.

5.2 Student Success-related activities

While the University of Bristol's overall track record in student retention is strong, we will increase investment in activities which provide support for the specific challenges which students from widening participation backgrounds often face in making the transition to university-level study by £0.2m – from £0.4m per annum in 2011/12 to £0.6m by the time we reach steady state in 2016/17.

While the University has a strong track record in the area of student retention, we recognise that students from widening participation backgrounds often face specific challenges in making the transition to university level study and that this is reflected in higher than average withdrawal rates for a number of under-represented groups. Prior to 2012, we were investing £2.1m p.a. in student welfare services and £1.2m p.a. in student careers and employability support. In 2011/12, a further £0.4m was allocated to initiatives specifically designed to provide support in the area of retention of students from under-represented groups. For 2014/15, we have increased this by £0.2m (to £0.6m by the time we reach steady state in 2016/17) to:

- Expand our peer mentoring and peer assisted study programmes
- Review university-level induction and transition support more widely to ensure that students from non-traditional backgrounds continue to be as well supported as possible.
- Enhance student support provision to ensure it meets the needs of under-represented groups.

Discussions are also underway with the Careers and Employability Service to develop internships for students from under-represented groups, with a particular focus on professions with low social mobility.

In line with our commitments to *Buttle UK*, all care leavers have the support of a staff member, who acts as a personal adviser. Students are provided with mentoring and advocacy support from point of application to graduation and guaranteed a peer mentor on arrival and 365 day/year accommodation within the University.

For further details, please **see Appendix Four**.

5.3 Student financial support

5.3.1 Undergraduate Support

As part of our strategy for widening participation, we have made a clear commitment to ensuring that, as fees increase, students with genuine financial need are in receipt of good advice and appropriate financial assistance. Our aim is to ensure that no student has legitimate reason to be deterred from applying to Bristol because of their inability to meet the costs of living and studying here.

⁹ Organisations with whom students are working include Bristol Libraries, the Bristol Drugs Project and the National Autistic Society.

To underpin this aim, the University's core Financial Support Package for full-time undergraduate students entering the University in 2014 will deliver:

- A reduced tuition fee of £3,500 p.a. for all students whose residual household income is £15k or below. ***These students pay no more for their education than under previous financial arrangements.***
- A reduced tuition fee of £4,500 p.a. for all students whose residual household income is £20k or below.
- A reduced tuition fee of £6,000 p.a. for all students whose residual household income is £25k or below.

In addition, we will offer an enhanced financial support package to full-time undergraduates who have participated in our Access to Bristol scheme. This will deliver:

- A full tuition fee waiver and an annual maintenance bursary valued at £3750 for those Access to Bristol 'graduates' who have a residual household income of £25k or below. ***These students should be able to complete their studies at Bristol without incurring any debt for tuition or maintenance costs.***

Students eligible for our financial support package have an option to convert £2,000 p.a. of their fee waiver entitlement into a cash bursary.

All these amounts are valid for 2014/15 and will increase annually in line with inflation (assuming that tuition fees also rise to reflect inflation). Eligibility will be determined in accordance with the SLC assessment of household income for state support purposes.

Embedded within this package are awards made through the National Scholarship Programme. For full-time students, these are offered as fee waivers, as an integral part of the student finance package described above. Students have the same option to convert part of their fee waiver to a cash bursary but the proportion of this bursary funded through the NSP will not exceed £1k. Awards made through the National Scholarship Programme will be made where a student's residual household income is £12,000 or below. The matched funding element of NSP awards is paid in a student's second year. Thereafter, a student continues to receive funding under our standard student finance package. NSP awards to part-time undergraduates will be made using the same household income criteria to but part-time students will not be eligible for additional funding, over and above the NSP specified match-funding, through the University's own student finance package.

In the event of demand exceeding award availability, we will prioritise those students with the lowest household income levels, whilst ensuring that the ratio of part-time to full-time awards is in line, as far as possible, with the ratio of part-time to full-time student numbers.

Our student funding office's analysis of the costs of living and studying in Bristol suggests that, for those students in lower income groups, our core student finance package, combined with state support (tuition fee loans and maintenance grants/loans) and some part-time working should ensure that eligible students have sufficient funding at their disposal to cover normal tuition and maintenance costs while at the University.

From the outset, our Students' Union President and Vice-President (Education) played an active role in helping us to develop this package and worked with us to ensure that proposals were informed by focus group work with both current students and in local schools to clarify the levels of support which would be most attractive to widening participation students both during the application process and after arrival at the University. In discussion with our Students' Union, we have now commissioned the University's widening participation research cluster to undertake more comprehensive research to determine the impact of our student financial package and this may lead to further refinement of the package for future cohorts.

While we are confident that, for most students, this package should provide an appropriate level of support, we are, in addition to the core package, investing in hardship funds to provide an additional safety net for those UK undergraduate students who, through no fault of their own, find themselves in financial difficulty during their studies. In 2014/15, a total of £410k will be set aside for this purpose. This includes £60k, which is available to support students with the purchase of course books and materials. Priority for these funds will be given to students with the greatest financial need, taking into account the other financial support which they receive as well as their ability to undertake part-time work (we recognise, for example, that students with dependents and those on particularly intensive courses may not be able to work part-time during their studies). It is estimated that approximately £360k will be allocated from this fund to OFFA-countable groups.

In parallel with arrangements for 2014/15 described here, we will continue to honour financial commitments to students admitted to the University on support packages described in previous Access Agreements.

A more detailed breakdown of proposed levels of investment in student financial support is provided in the separate **OFFA Annex B**. Note that we have assumed that plans to grow student numbers will not increase the cost of the student finance package. However, this will be kept under review as the package beds in.

5.3.2 PGCE Support

Most PGCE students are able to access financial support from other sources. We do not therefore believe that a support package mirroring the undergraduate one is appropriate. However, we feel that there is still a case for a small scale package to ensure PGCE¹⁰ students from low income backgrounds are not deterred.

In 2014, we will therefore offer a more limited financial support package for PGCE students, delivering:

- A bursary of £9k for students with a first class undergraduate degree, whose residual household income is £42,611 or below and who is not already in receipt of bursary funding of £4k or above from another source.
 - A bursary of £4k for students with an upper second undergraduate degree; whose residual household income is £42,611 or below and who is not already in receipt of bursary funding of £4k or above from another source.
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- An initial assessment will be made on the basis of SLC data, as in the case of our undergraduate support package. Any student identified as having a residual household income of £42,611 or below will move on to the second phase of assessment.
 - In the second phase of assessment, we will factor in any bursary support which students are eligible for from other sources. Any student who meets the academic criteria detailed above and not eligible for a bursary of £4k or above from another source would be eligible for a University of Bristol bursary.

This will ensure that financial support is targeted at those most in need. As a good proportion of BME students currently apply for PGCE streams which do not readily attract bursary funding from other sources, we anticipate that there will also be indirect benefit for efforts to increase the number of students from minority ethnic backgrounds undertaking a PGCE.

The PGCE support package will be reviewed on an annual basis, within the context of any potential changes in wider bursary availability.

6. Targets and Progress Measures

For the purposes of this Access Agreement, the University of Bristol will assess progress in widening participation against a combination of progress measures which, between them, are designed to assess:

- The specific impact of a number of key outreach initiatives.
- Year on year progress in diversifying our applicant and student population.
- Year on year progress in improving conversion of under-represented applicants.

Bearing in mind the range of outreach which we plan to offer, we intend to measure year on year progress in attracting a wider pool of applicants by focusing particularly on each of the following categories (although additional measures included in our 2012 Agreement have also been retained for continuity of monitoring):

- Applicants from low performing schools
- Applicants from socio-economic groups 4-7
- Local applicants

Progress measures for each of these (which include measures designed specifically to enable us to monitor conversion from application to intake) are provided at **Appendix Five**.

As far as possible, measures have been calculated taking account of the expected impact of a number of specific outreach initiatives (the *Access to Bristol* scheme, summer school programme and personal adviser scheme), each of which also has more detailed performance targets associated with it (see **Appendix Five**).

Measurement of intake profile will be focused on low school performance, reflecting the role this plays in our contextual approach to admissions. Measures for mature student intake have been included for continuity.

¹⁰ Note that eligibility thresholds and award amounts have been aligned with current Teaching Agency bursary criteria and eligibility thresholds and will change to reflect any alterations to these

Our decision to grow undergraduate numbers substantially means that, from 2012/13 onwards, continuing to measure progress in diversifying intake by looking at under-represented groups as a percentage of total intake hides any progress in growing intake from non-traditional backgrounds. For each intake-related measure, we have therefore added the number of students the original percentages might have been expected to deliver. Monitoring against these numbers will give a more accurate idea of progress.

All progress measures have been informed by more detailed analysis of progress against our HESA benchmarks (detailed in **Appendix Three**) and will be re-calculated annually to reflect assessment of our progress to date. In addition, it should be noted that we intend to carry out further research, for example, to better understand the impact of educational standards in the Bristol area on our ability to progress at the specified rates; we may need to adjust progress measures for future years to reflect the findings.

7. Monitoring and Evaluation

Progress in delivering widening participation strategy is monitored by the University's Education Committee, chaired by the Pro Vice-Chancellor (Education and Students) and including Students' Union representation.

In addition, the Education Committee (through its Student Recruitment Committee – also chaired by the Pro Vice-Chancellor Education, with a membership which includes admissions and widening participation expertise as well as Students' Union representation) requires each of the University's faculties and relevant support services divisions to submit, and report against, an annual action plan, containing detailed actions supporting delivery of the Widening Participation Strategy.

Strategy development is routinely informed by research commissioned from the University's Widening Participation Research Cluster. For example, our contextualised approach to selection, which has led to a lower offer to any applicant from a low performing school was developed as a result of research conducted by the Research Cluster. This indicated a correlation between A-Level attainment, low school performance and student success on undergraduate programmes at the University. Current Research Cluster projects include an analysis of the impact of the University's student finance package on our ability to attract and retain a diverse student community. We are also funding studies into: efficacy of our widening participation progress measures; the impact of prior educational attainment and other relevant student background factors on the progress and retention of disadvantaged students at the University; the role which self-identification and aspiration play in the university application decision-making process; fostering a culture of belonging (amongst widening participation students); overcoming mathematical barriers to participation in higher education and removing barriers to higher education (financial transparency, peer effects, peer attainment). Outcomes will inform future strategy for outreach, student success and financial support provision.

The University is also represented on the steering group of the UUK review of part-time and mature students, which will explore impact of recent financial changes as well as information, advice and guidance issues.

Operational responsibility for delivery and monitoring rests with the Widening Participation and Undergraduate Recruitment team, reporting to the Director of Student Recruitment, Access and Admissions. This team conducts a detailed annual review of progress against Access Agreement commitments, reporting key conclusions, achievements or concerns to the Student Recruitment Committee, which is accountable to Education Committee for overseeing compliance and monitoring progress against OFFA-related targets.

Analysis of the impact of the University's outreach work indicates that those projects with the greatest success rates are long term interventions. This has influenced the overall focus of our outreach efforts. For example, the *Access to Bristol*, *Pathways to Law* and *Realising Opportunities* schemes are all sustained programmes, run over a series of weeks, months and years and bringing participants into contact with current students, academic staff and specialist mentors. For 2012/13, we received 118 applications from *Access to Bristol* participants (from a cohort of 200) and 13 from *Pathways to Law* (from a cohort of 50). This delivered an intake of 37 and 4 respectively. Evaluation of the first *Realising Opportunities* cohort indicates that those who continued on the scheme for its duration had higher UCAS acceptance rates than comparable non-participating cohorts. As a result, the University has expanded the *Access to Bristol* initiative, developed a guaranteed offer for those on the scheme and committed to on-going development of *Realising Opportunities* when the HEFCE-funded pilot ends. Further work is being undertaken to establish whether *Access to Bristol* participants chose to apply to both the University of Bristol specifically and Higher Education more generally. The findings of this work will inform future scale and content of the scheme.

Specific initiatives are evaluated using a range of quantitative and qualitative measures, a number of which are included in our Access Agreement (please see **Appendix Five**). A 'Guide to Evaluation' has been developed to ensure that appropriate evaluation is built in to planning of all activities. Outreach activities are assessed at a number of levels including: monitoring participant data to ensure activities reach target groups;

participant feedback following events; pre- and post-event activity questionnaires measuring change in attitudes over time; and longitudinal work investigating outcomes such as participant behaviour. These approaches apply to both collaborative and university-specific work. Outcomes can result in fine tuning of initiatives to develop and enhance experience for participants, the termination of a project or its development.

Monitoring and evaluation of the Personal Adviser scheme, for example, which showed a clear impact on conversion of under-represented applicant groups, led to its expansion while the decision to include mature students in the Access to Bristol scheme was taken in the light of qualitative feedback from local Further Education colleges who indicated the potential value of the scheme for adult learners. We are currently undertaking research to examine the correlation between low performing schools and low participation neighbourhoods which, if found to be positive will inform future targeting of our school-based outreach (currently focused on low performing schools locally and in 'target' areas elsewhere in the UK).

We adopt a similar approach to evaluation of student success. At a policy level, while our overall track record in student retention is strong, we have commissioned research into retention rates of under-represented groups, with a particular focus on black and minority ethnic students.

At an activity-specific level, we have taken the decision to extend our peer mentoring scheme for first year undergraduates across all six faculties. This decision was informed by participant feedback, indicating that 83% of participants in 2011/12 felt that the scheme helped them settle into university. Peer mentoring (which is available to all students but with additional promotion to specific under-represented groups including those from low performing schools) is currently available during the first semester only but we are actively considering extending the offer beyond the first semester in response to feedback from our Students' Union that many first year students would benefit from additional support at the beginning of their second semester.

8. Provision of Information to Students

Details of tuition fee levels and of the financial support available to students will be routinely published in our prospectus and on our website.

Our Student Funding website includes information to enable students to work out the likely costs of studying at Bristol and to identify the various sources of funding (including both government and University of Bristol support) which they might be able to draw on to support themselves during their studies.

Information on tuition fees and financial support available to students will also be made available, in a timely way, to UCAS and to the SLC, as they reasonably require, to populate their applicant-facing web services.

9. Equality Act 2010

The University fulfils its commitments under the Equality Act 2010 by integrating equality and diversity considerations into all decision-making processes and into the development of strategy and policy across the institution. Equality analysis must be undertaken on all policies and activities and committee cover sheets require reference as to how equality related issues and relevant equality data have been taken into account.

In accordance with this agreed approach, equality considerations have been embedded into the design of both the Widening Participation Strategy and of this Access Agreement, which sets out how we will sustain and improve access, retention and attainment among people from under-represented groups. Equality analysis has been a part of the policy development process and will inform implementation.

We undertake a detailed annual review of progress against all widening participation progress measures at university, faculty and programme level. Our analysis is used to help us identify groups that are particularly under-represented and to develop appropriate targeted actions to improve the diversity of our student body.

Monitoring pays particular attention to applications with protected characteristics and we have included progress measures for race, disability and age in our Access Agreement. We monitor gender and respond to trends in the data (working, for example, to increase participation of female students on some science and engineering programmes and encouraging male students to participate in summer schools) and have due regard to equality duty when selecting students. As we currently perform relatively well against progress measures for BME applications, outreach currently targets mature learners and students with disabilities.

The Widening Participation and Undergraduate Recruitment team will work closely with the Equality and Diversity team to ensure that implementation of our Widening Participation Strategy and Access Agreement continue to support equality and diversity objectives. The University's objective of improving the representation of women in academic leadership roles is particularly important for our widening participation strategy, given the importance of role models in attracting students from under-represented backgrounds.

Appendix One: Students' Union – Involvement with Access Agreement Development Process

14 May 2012	Informal meeting of Director of Student Recruitment, Access & Admissions; outgoing Students' Union President, Vice-President Education and incoming Vice-President Education	Informal discussion of student finance package and the Student Union's priorities for future development.
5 November 2012	Admissions, Recruitment and Widening Participation Strategy Group meeting (Vice-President Education is a member of this group)	Agreement of objectives for updated Widening Participation Strategy
27 November 2012	Informal meeting of Director of Student Recruitment, Access and Admissions, Vice-President Education, Student Funding Manager and Director of WP Research Cluster	Informal discussion of student finance package and identification of priorities for impact-research
27 November 2012	Informal meeting of Head of Widening Participation and Undergraduate Recruitment and Vice-President Education	Discussion of outreach priorities in re-drafted Widening Participation Strategy
23 January 2013	Admissions, Recruitment and Widening Participation Strategy Group meeting (Vice-President Education is a member of this group)	Discussion of draft Widening Participation Strategy revision
18 February 2013	Admissions, Recruitment and Widening Participation Strategy Group meeting (Vice-President Education is a member of this group)	Approval of WP Strategy Revision; discussion of 2012 entry WP application/intake data; agreement of overall priorities for 2014/15 Access Agreement.
20 February 2013	Education Committee (Vice-President Education is a member)	Approval of Widening Participation Strategy Revision
4 March 2013	Student Affairs Committee (All members of the Students' Union sabbatical team are members)	Revised Widening Participation Strategy shared with committee.
	Electronic consultation on final draft Access Agreement	
8 March 2013	Meeting of Director of Student Recruitment, Access and Admissions with Students' Union sabbatical team	Discussion of final draft Access Agreement
15 March 2013	Council (President & two Vice-Presidents including the VP Education are members)	Approval of Widening Participation Strategy Revision and 2014/15 Access Agreement

Appendix Two Investment of Additional Fee Income – Transition Period

	2013/14	2014/15	2015/16	2016/17 (steady state)
Outreach activities	£2.6m	£2.2m	£2.8m	£2.6m
Progression/retention activities	£0.6m	£0.6m	£0.6m	£0.6m
Student Finance Package	£7.29m	£8.9m	£8.9m	£9.1m
TOTAL REINVESTMENT	£10.4m	£11.7m	£12.3m	£12.3m
% of additional fee income	31.3%	31.3%	31.3%	31.3%

Appendix Three Progress in Widening Participation to the University of Bristol against HESA Benchmarks

WP Category	HESA Participation Benchmark	Actual Intake 2009/10	Actual Intake 2010/11	Actual Intake 2011/12	Actual Intake 2012/13
Mature Students ^{11*}	7.7%	5.2%	4.4%	5.9%	4.6%
Students from Low Participation Areas ¹²	5.0%	11.9%	10.4%	9.9%	11.0%
Socio-economic groups 4-7	17.5%	13.4%	11.6%	11.3%	12.6%
Disabled students	3.9%	6.2%	7.1%	7.3%	7.2%
State school	72.0%	59.0%	59.5%	54.7%	55.0%

¹¹ The mature student HESA benchmark is defined as 'mature full time undergraduate entrants from low participation neighbourhoods'. There is no benchmark for mature students excluding the low participation neighbourhood marker. It should be noted that the University's performance in relation to mature students is based on the age of the student only.

¹² The University measures LPN intake on the basis of the lower two POLAR quintiles, while HESA uses only the lowest quintile. HESA Benchmark & actual intake data therefore not directly comparable

Appendix Four
Investment in Activities to support Outreach and Progression/Retention

The following table summarises the approximate allocation of funding to support outreach and student progression/retention over the period from 2013/14 until the new funding arrangements reach steady state in 2016/17. The exact breakdown is likely to vary year on year as plans evolve.

	2014/15		2017/18	
Outreach activities	Coverage	Cost	Coverage	Cost
Awareness-raising activities including: Schools outreach	10,000 students (primary – post 16)	£360k	12,000 students (primary – post16)	£360k
Mature student-related activity	1500 students		2000 students	
Open days	3		3	
Mobile Teaching Unit	1000 students		1500 students	
Summer Schools	160 year 12 students	£60k	160 year 12 students	£60k
Access to Bristol scheme	550 year 12 students	£140k	550 year 12 students	£150k
New satellite model	TBC		TBC	
WP Marketing materials		£20k		£20k
WP Research Cluster		£235k		£130k
Collaborative Activity including:				
Realising Opportunities	70 year 12 students	£42k	70 year 12 students	£42k
Summer school delivered in collaboration with the universities of Bath and Exeter	50 year 11 students	£50k	70 year 11 students	£70k
Into University partnership	1270 students (years 9-13)	£100k	1500 students (years 9-13)	£100k
Universities of the South West website				
Personal adviser scheme	300 mature applicants 670 applicants from schools with low HE progression rates	£110k	450 mature applicants 1150 applicants from schools with low HE progression rates	£110k
Pathway/progression route development		£200k		£300k
Faculty initiatives		£158k		£300k
WP team salaries to support outreach		£710k		£957k
Support for relationship with Merchants' Academy/Brymore UTC Link		£20k		£20k
PGCE-related outreach including: Path into teaching Mentoring and tutoring CPD	10 mentors 2 CPD sessions	£16.5k	10 mentors 2 CPD sessions	£16.5k
Total Outreach		£2.22m		£2.63m

Progression/retention activities				
Student Navigation Network	5000 undergraduates	£23k	7000 undergraduates	£23k
Peer Assisted Study Scheme	600 undergraduates	£6k	1200 undergraduates	£6k
Buttle Quality Mark		£1k		£1k
Disability support		£5k		£5k
Enhanced student services support		£95k		£95k
WP team salaries to support retention		£110k		£110k
Other continuing progression-related activities(student job shop, student finance website, student funding advisers etc)		£371k		£360k
Total Progression/Retention		£611k		600k

Appendix Five Progress Measures

1. Activity-Based Measures

Access to Bristol Scheme

	Actual Number 2010/11	Actual Number 2011/12	Actual Number 2012/13	Target Number 2013/14	Target Number 2014/15	Target Number 2015/16	Target Number 2016/17
Participating Students	269	280	382	525	550	575	600
	Actual Number 2012 Entry	Target Number 2013 Entry	Target Number 2014 Entry	Target Number 2015 Entry	Target Number 2016 Entry	Target Number 2017 Entry	Target Number 2018 Entry
Applications	118	108	200	210	220	230	240
Intake	39	27	60	67	70	73	76

Summer Schools

	Actual Number 2011	Actual Number 2012	Target Number 2013	Target Number 2014	Target Number 2015	Target Number 2016
Participating Students	155	158	160	160	160	160
	Actual Number 2012 Entry	Target Number 2013 Entry	Target Number 2014 Entry	Target Number 2015 Entry	Target Number 2016 Entry	Target Number 2017 Entry
Applications	75	90	98	106	114	122
Intake	31	35	37	39	41	43

Personal Adviser Scheme

	Actual Conversion to intake				Target Conversion to intake			
	2009 Entry	2010 Entry	2011 Entry	2012 Entry	2013 Entry	2014 Entry	2015 Entry	2016 Entry
Local (excl mature)	31%	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Mature	68%	48% ¹³	54%	44% ¹⁴	54%	56%	56%	56%
Low progression South West	N/A	34%	35%	29%	40%	42%	42%	42%
Low progression West Midlands	N/A	27%	20%	N/A ¹⁵	31%	33%	35%	35%
Number of Offers on which data is based								
Local (excl mature)	497	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Mature	112	189	218	225	300	350	350	350
Low progression South West	N/A	594	290	479	600	700	800	900
Low progression West Midlands	N/A	63	20	N/A	70	100	125	150

Peer Mentoring and Peer Assisted Learning schemes

	Actual Number 2011/12	Actual Number 2012/13	Target Number 2013/14	Target Number 2014/15	Target Number 2015/16	Target Number 2016/17
Peer Mentoring Scheme						
Coverage	3765	4474	4600	6500	6500	6500
Participating students	181	103	500	600	650	650
Peer Assisted Learning						
Coverage	265	390	1000	1500	2000	2000
Participating students	30	37	100	200	350	400

NB both schemes operate on an 'opt-in' basis. The *coverage* figure therefore relates to the number of students that the scheme is offered to and the *participants* figure relates to the numbers who choose to participate.

¹³ For 2010, the geographical catchment for mature students targeted through the scheme was extended beyond the local area. The drop in conversion between 2009 and 2010 entry was therefore anticipated and is not seen as an indication of loss of impact.

¹⁴ Conversion rates were much lower across the university as a whole in 2012, in part due to the fall in A-level grades which meant that fewer applicants met the terms of their offer.

¹⁵ This group was not targeted in 2012 due to transition to centralised undergraduate selection

Collaborative Activity: Year 11 Summer School with Universities of Bath & Exeter

	Actual Number 2012/13	Target Number 2013/14	Target Number 2014/15	Target Number 2015/16	Target Number 2016/17
Participating Students	57	55	60	65	70

Collaborative Activity: Realising Opportunities Scheme

	Cohort 1 (2010-11)	Cohort 2 (2010-12)	Cohort 3 (2011-13)	Cohort 4 (2012-14)	Cohort 5 (2013-15)	Cohort 6 (2014-16)
Business Plan target			32%	34%	36%	38%
Actual intake to Realising Opportunities universities	24%	19%				
Actual intake to Research intensive universities	3%	6%				

PGCE: Expansion of Mentoring/Tutoring Programme

	Actual Number 2012/13	Target Number 2013/14	Target Number 2014/15	Target Number 2015/16	Target Number 2016/17
Number of mentors/tutors	81	75	75	75	75
% BME	14%	15	15	15	15

PGCE: CPD Provision

	Actual Number 2012/13	Target Number 2013/14	Target Number 2014/15	Target Number 2015/16	Target Number 2016/17
Number of attendees	0	25	25	25	25
Number from WP target schools	0	10	10	10	10

2. Category-based Measures

Annual Progress Measures – Applications

WP Category	Actual 2011 Entry	Actual 2012 Entry	App Progress Measure 2013 Entry	App Progress Measure 2014 Entry	App Progress Measure 2015 Entry	App Progress Measure 2016 Entry
Students from low performing schools/colleges	17.9% ¹⁰	16.7%	19%	20%	21%	22%
Mature	9.5%	10%	9.5%	10%	10.5%	11%
Socio-economic groups 4-7	13.6%	14.2%	14%	15%	15.5%	16%
Minority Ethnic	13.8%	15.1%	13.2%	13.7%	14.2%	14.7%
Disabled	6%	6.4%	5.6%	5.6%	5.6%	5.6%
Local students	3.8%	3.9%	4%	4.4%	5%	5.5%

Annual Progress Measures – Conversion from Application to Intake

WP Category	Actual Conv'n 2010 Entry	Actual Conv'n 2011 Entry	Actual Conv'n 2012 Entry	Progress Measure 2013 Entry	Progress Measure 2014 Entry	Progress measure 2015 Entry	Progress measure 2016 Entry
Students from low performing schools/colleges	9%	9.6%	12.5%	9.8%	9.8%	9.9%	10%
Socio-economic groups 4-7	8%	8%	11.6%	8.2%	8.3%	8.4%	8.5%
Local students	13%	14.3%	15.6%	14.5%	14.6%	14.7%	14.8%

Annual Progress Measures – Intake

Note: The University plans to grow overall undergraduate numbers substantially over the next few years. The Intake-related measures articulated as percentages in our 2012 Agreement are therefore no longer meaningful and the table below therefore also shows the actual student numbers which the original measures would have been expected to deliver.

WP Category	Actual Intake October 2011	Actual Intake October 2012	Intake Progress Measure 2013	Intake Progress Measure 2014	Intake progress measure 2015	Intake Progress measure 2016
Students from low performing schools/colleges	18.1% ¹⁶	16.0% ¹⁰	21%	23%	25%	27%
Students from low performing schools/colleges	577	604	669	773	797	860
Mature Students	5.9%	4.6%	4.6%	5%	5.5%	6%
Mature Students	188	173	147	159	175	191

¹⁶ We are experiencing issues with UCAS data quality, with a large increase in schools which cannot be matched to DfE school performance data. We believe this partially accounts for the 2011 drop in applications/intake in this category.

Withdrawals during first year of study

WP Category	Actual 2007/08 Entry	Progress measure 2012/13 Entry	Progress measure 2013/14 Entry	Progress measure 2014/15 Entry	Progress measure 2015/16 Entry	Progress measure 2016/17 Entry
Socio-economic groups 4-7	4.5%	3.65%	3.65%	3.6%	3.6%	3.6%
Minority ethnic	2.9%	2.6%	2.6%	2.6%	2.6%	2.6%