

UNIVERSITY OF EXETER
ACCESS AGREEMENT 2006/07 – 2010/11

1. Level of Fees

1.1. For students commencing courses after 1 September 2006, apart from students who have been permitted to defer entry from 2005, the University of Exeter proposes to set tuition fees across all undergraduate courses at the rate of £3,070 per annum, including students enrolled on PGCE courses. The only exceptions to this will be:

- BSc Medical Imaging (Diagnostic Radiography), for which the annual fee will be covered by an NHS Bursary;
- Students spending a whole year studying at a European University under the Socrates/Erasmus programme, who will be exempted from all tuition fees;
- Students undertaking a full-year placement either in industry or at a foreign university not covered by Socrates or Erasmus, who will be liable for fees of £1,535 per year;
- Fifth year B Medicine or B Surgery students at the Peninsula Medical School, where tuition fees of £3,070 will be met by the Department of Health.

1.2. Prices and charges will be publicised and made readily available to prospective applicants through the normal channels, as outlined in section 4.3 below. Students will be advised that these fees will be subject to annual inflationary rises, and the aggregate cost of studying on all programmes will be made clear.

1.3. We accept the principle that a significant proportion of the income generated through higher fees should be used to fund extended outreach activity and targeted bursary schemes. However, it is clear to us that students who will be paying the higher fees are likely to have much higher expectations in terms of facilities, resources and both academic and pastoral support. In response we must make every effort to ensure that their expectations are met and exceeded. Therefore, in drafting this agreement, we are aware of the need to strike an appropriate balance between these two demands on additional income.

2. Bursaries and Financial Support

2.1. The University of Exeter understands and fully supports the Secretary of State's concern regarding the potential deterrent nature of the perceived cost of higher education within some under-represented groups. Through our proposed bursary schemes we have indicated that we are prepared to allocate a significant amount of fee income on bursaries for 2006 entrants from poorer backgrounds, with similarly generous amounts for subsequent years. In this section we will outline the approach to targeting and promotion of bursaries, and in section 6 we will detail the proposed levels of expenditure.

2.2. Through the locally targeted top-up bursary scheme, the University is setting out to draw together the areas of outreach work and financial support, in order to develop a holistic and far reaching approach to the issues relating to under-aspiration and under-representation.

2.3. The national bursary scheme will be open to any applicant to the University, and eligibility for national bursaries will be judged on the basis of financial criteria, with evidence of family income being obtained through the LEA means-testing process. All students from families with income levels below £17,910, who receive the full Maintenance Grant, will be guaranteed the Minimum Standard Bursary of £305. Additional support will be allocated to students on a sliding scale to an upper income limit of £38,330 per year. The value of each bursary will range from £50 to

£2,000 per year, with the highest-level bursaries going to those in the lowest income bracket (i.e. below £17,910 per year). Bursaries will be awarded to support day-to-day living expenses such as accommodation. It is not the intention of the University of Exeter to use bursaries as a means of subsidising tuition fees.

- 2.4. We recognise that there is an increasing tendency for those under-represented in higher education to seek a place of study relatively close to their family home. The reason for this may be in part due to financial concerns and the expectation of family support, but may also be due to socio-cultural factors that limit geographical mobility for work and study in the case of lower socio-economic groups. Therefore we believe that we are most likely to attract students from poorer backgrounds from the southwest region, most specifically the peninsula region of Devon, Cornwall and Somerset.
- 2.5. For reasons outlined above, over the last two years we have been seeking to establish and develop active working relationships with schools and colleges from this area. Section 3 gives details of our proposals for existing, extended and new outreach provision through partnerships with schools and colleges in the southwest.
- 2.6. Through the establishment of such effective working relationships with teachers and lecturers at partner schools and colleges, we will seek to identify and promote our local top-up bursary scheme to those who are judged to be most in need of support. The dual approach of national and locally targeted schemes means that in some cases support of up to £4,000 per year will be available.
- 2.7. In advance of the proposed bursary schemes funded through fee income, the Exeter Foundation Bursary Scheme has been developed from Alumni funds to offer support to students from 11 existing post-16 compact schools and colleges in the south west. Through this scheme, 30 bursaries of £2,000 per year of study will be available for 2005 entrants, with a further 10 in 2006 and 2007 respectively. The criteria for eligibility and award are broadly similar to the proposed criteria for the post 2006 local top-up scheme, which will allow a trial and improvement of the process prior to the main scheme for 2006 entrants.
- 2.8. Different arrangements will be put in place to meet the special circumstances of prospective PGCE students, and prospective students at the Peninsula Medical School which is managed jointly by the Universities of Exeter and Plymouth:
 - 2.8.1. PGCE students will be liable for fees of £3070, but will also be eligible for much more generous funding through TTA Bursaries and LEA Maintenance Grants. For this reason, we do not feel it appropriate to treat PGCE students in the same way as undergraduates when considering financial need. The School of Education and Lifelong Learning will retain the portion of fee income that would normally be allocated to the central pot for bursaries (see Section 6). All PGCE students who are in receipt of the full maintenance grant will be awarded the Minimum Standard Bursary of £305 from the School. In addition, the School has undertaken to retain the remainder from the 25% of the additional fee income used elsewhere for bursaries, and to use this to develop a scholarship scheme best suited for the challenges of attracting and recruiting a diverse range of talented students to PGCE courses.
 - 2.8.2. Students at the Peninsula School of Medicine will be enrolled at either the University of Plymouth, or the University of Exeter. The two Universities will be offering different bursary support, and we intend to ensure that no student be treated less favourably as a result of their allocation to one or the other University. When considering bursary applications, PMS will take account of the different support arrangements offered by each of the Universities, and will seek to ensure that the package of support offered matches the most generous that would be available for the specific needs of the student, irrespective of the student's home institution.

2.9. Taken together, we believe that the above measures reflect the University's commitment to tackling the possible deterrent effect of the perceived cost of higher education amongst disadvantaged groups. In summary to this section, the key points are as follows:

- The generosity in terms of the total amount of fee income that will be allocated to bursary provision;
- The availability of a national scheme open to any financially disadvantaged students;
- The embedding of financial support schemes into local partnership and outreach provision;
- The establishment in 2005 of a pilot scheme funded from the University's own resources to test and improve mechanisms for targeting and application process.

3. Outreach Activities

3.1. Outreach activity at the University of Exeter is currently focused on a strong partnership arrangement with 15 schools and colleges across the southwest peninsula. We are also actively engaged in a range of interventions in collaboration with other HEIs in the southwest through the Aimhigher programme. These outreach programmes have been developed with the aim of raising aspirations towards HE generally, and are not directly recruitive for the University of Exeter in particular.

3.2. Students who are eligible to apply for places under the new funding arrangements in 2006 will be considering their options in 2004/05 and applying in 2005/06. Therefore the University has already committed a significant level of resource to ensure that we are able to increase our partnership arrangements and outreach provision in the interim. The commitment of our own funds in advance of 2006 is evidence of our recognition of the importance of widening participation. We hope the spirit with which we have embarked on such work with likely 2006 entrants will be taken into account when the issue of additionality is considered.

3.3. As a consequence of the above, we plan to undertake substantial consultation in 2004/05, to pilot new developments in 2005/06, and to extend the scheme to a maximum of 50 partner schools and colleges over the period covered by this agreement. We do not intend to grow the scheme beyond 50, as we believe this represents an optimum number to balance quantity and range of activities with the need to assure quality.

3.4. In addition to the partnership arrangements directly connected to outreach activity, we are currently in consultation with the University of Plymouth regarding the progression of students on Foundation Degrees at Plymouth and in their partner colleges onto University of Exeter programmes. We expect that a sizable number of those progressing through this route are likely to come from under-represented groups.

3.5. Additionality in respect of outreach provision will be achieved through the following means, as indicated in Appendix 1:

- By development of an *extended programme* of activities from year 10 – year 13 in partner schools;
- By increasing the *number of outreach interventions* made through partner schools;
- By increasing the *number of pupils* engaged in outreach activities.

4. Financial Information for Prospective Students

4.1. In the process of developing these proposals for financial support outlined under section 2, the University has given consideration to the means by which information on the availability of support should be communicated to prospective students.

- 4.2. Fee-income will be used to support additional staff posts in the Scholarships and Bursaries Office, in order to ensure the effective distribution of information. In order to develop a more proactive approach, and to offer individual financial advice to those who might be most deterred from considering HE, an additional post in the Guild of Students will focus on supporting the outreach programme for partner schools.
- 4.3. In respect of tuition fee levels and financial support available the University proposes to communicate with students in a number of ways:
- Through printed and web-based information sources (prospectus, leaflets etc), to be distributed through the normal channels at UCAS HE Conventions and Careers Fairs. We expect this information to be available for distribution in line with prospectus publication dates, i.e. late in spring term of 2005;
 - Through finance workshops and advice surgeries in partner schools and colleges in the southwest, throughout the normal cycle of student preparation for application and entry, commencing spring term 2005;
 - Through presentations and advice surgeries at open days and other recruitment events during the normal cycle of pre- application events.

5. Milestones and Measures of Progress

- 5.1. In considering the means by which the University might seek to measure progress, we believe it is important to build on work that is already underway. Much of the emphasis in widening participation initiatives has been driven by the HEFCE performance indicators showing the proportion of students drawn from state schools, and the proportion drawn from lower socio-economic backgrounds. Such data will be required for submission to HESA, and will be publicly available.
- 5.2. It is therefore proposed that the main indicators by which we will seek to measure progress should be improving application and entry from state school and lower social class students. The baseline data we will use will be collected for those entering this University in 2002/03, since this will be the most timely and accurate data available to us at the time this agreement is drafted.
- 5.3. It is possible that the amount of media attention given to the introduction of differential fees could temporarily deflate the number of students from poorer backgrounds applying to university. In anticipation of this possibility, we believe it is more realistic to set targets to be achieved over the five years covered by this agreement, to be reviewed year on year in the context of national trends, rather than year on year targets which could be disproportionately affected by such temporary fluctuations.
- 5.4. The 2002/03 HESA Performance Indicator data shows that we currently recruit 66.9% of our young undergraduate intake from state schools and 14.9% from lower socio-economic groups. We propose to set ourselves the target of increasing these figures to 70% for state school entrants and 17% for lower social classes over the period covered by this agreement.
- 5.5. Whilst we do not believe that it would be practical to report annually on progress towards the main indicator of student entry from state school and lower socio-economic backgrounds for the reasons outlined in 5.3 above, we believe that it would be helpful to measure progress in this respect on a biennial basis, with a final report produced in 2010/11.
- 5.6. There remain, nonetheless, key outputs which we will measure and report on an annual basis, including the following:
- Progress towards increased outreach activity as outlined in Appendix 1;

- Numbers of bursary applications received and awards made;
- Progress on offer and acceptance yields as outlined in 5.7 below.

5.7. In order to ensure that we are in a position to meet our targets we will use additional income generated to invest in the application and admissions process in pursuit of the following objectives:

- To attract increasing numbers of students from these backgrounds to *apply* to the University through the provision of targeted schools liaison and outreach activity;
- To increase the proportion of *offers* made to such students through the development of a fair and transparent admissions process which recognises potential;
- To improve the levels of *acceptance* of these offers by developing a clearer understanding of the factors affecting some students' disinclination to accept;
- To *convert* more of these acceptances into enrolled students.

6. Financial Expenditure

- 6.1 As outlined above in section 1.4, the University is committed to providing support both for bursary and outreach provision, whilst at the same time recognising the higher expectations that students will have in 2006 and the many additional calls there will be on tuition fee income.
- 6.2 During 2004/5 and 2005/6 the University plans to spend approximately £276,000 in each year on outreach activity with local schools and colleges. Approximately 70% of this funding is provided through the HEFCE Widening Access premium with the remainder provided from institutional resources.
- 6.3 The University proposes to increase the level of funding assigned to outreach activity by approximately 10% for each year during the period of this plan, as outlined in Appendix 2. We expect that additional income derived from differential fees will increase in line with inflation over these five years, as will the amount of money committed to outreach and bursaries. The figures presented in this table do not at present include an amount for inflation on either income or expenditure, but will be adjusted on an annual basis when inflation rates are known.
- 6.4 In summary, the University is committed to spend a minimum of £1,137,000 on outreach activity and bursary schemes in 2006/7, representing approximately 25% of the additional income from fees that the University is likely to collect. We also propose to spend a similar proportion in each of the subsequent years covered by this agreement.

7. Monitoring and Reporting Process

- 7.1 The University undertakes to provide an annual report to OFFA outlining progress made towards milestones and measures laid out in Section 5. We understand that OFFA will request that this information be provided as part of the HEFCE Annual Monitoring Statement for HEIs, but await further more detailed instructions regarding the precise structure required.

Appendix 1
Planned Programme of Outreach Activity

Milestone/Measure Number of events/ participating schools – (Brackets show estimated number of participating students)	Baseline (2003/04)	2006/07	2007/08	2008/09	2009/10	2010/11
Y10 student life workshop (in school) NEW (1)		10 events (1000)	15 events (1500)	20 events (2000)	20 events (2000)	20 events (2000)
Y10 'Aim Higher' visits (on campus) GROWTH (2)	5 school visits (200)	10 school visits (400)	10 school visits (400)	15 school visits(400)	20 school visits (800)	20 school visits (800)
Y10 subject taster days (on campus) NEW		5 events (250)	5 events (250)	7 events (350)	10 events (500)	10 events (500)
Y10 mentoring (in schools) TO BE REPLACED (see note 3)	10 schools (80)					
Y10 'Mentoring/buddying' NEW		10 schools (100)	15 schools (150)	20 schools (200)	20 schools (200)	20 schools (200)
Y10 Masterclass (residential / non residential)	2 (120) 2 x events 14 x schools	2 (200) 2 x events 14 schools	2 (200) 2 x events 14 schools	2 (200) 2 x events 14 schools	2 (200) 2 x events 14 schools	2 (200) 2 x events 14 schools
Y11 Finance presentations (in schools) NEW		10 events (500)	15 events (750)	20 events (1000)	25 events (1250)	30 events (1500)
Y11 summer school places (residential) GROWTH (subject to ESF funding see note 4)	2 events (100)	2 events (120)	2 events (120)	2 events (120)	2 events (120)	2 events (120)
Y11 mentoring TO BE REPLACED (see note 3)	10 schools (40)					
Y11 Mentoring/buddying NEW	10 schools (80)	10 schools (100)	15 schools (150)	20 schools (200)	20 schools (200)	20 schools (200)
Y12 Choices workshop (in schools) GROWTH	10 events (400)	10 events (400)	15 events (600)	20 events (800)	25 events (1000)	30 events (1200)
Y12 subject shadowing visits (on campus) NEW		5 schools (50)	10 schools (100)	15 schools (150)	20 schools (200)	25 schools (250)
Y12 e- mentoring NEW		2 schools (20)	5 schools (50)	5 schools (50)	5 schools (50)	5 schools (50)
Y13 Finance/UCAS workshops (in schools) GROWTH	10 schools (400)	15 schools (600)	15 schools (600)	20 (800)	25 (1000)	30 (1200)

1. NEW – indicates new area of activity available to partner schools
2. GROWTH – indicates increased delivery of existing activity, primarily for partner schools
3. One-to-one mentoring to be phased out and replaced with shorter programme of combined face to face in school, e-mentoring, campus visits, to allow greater reach and best use of resources
4. Growth in residential summer school provision is anticipated, but is subject to continuation of ESF funding

Note – the table represents estimates for numbers of schools and students participating in outreach activities, although it is not possible at this point in time to provide a prediction of total accuracy

Appendix 2

Projected Financial Expenditure

	2006/07	2007/08	2008/09	2009/10	2010/11
Number of students paying higher fee	2,493	5,202	7,911	8,127	8,127
Additional Fee Income	£4,549k	£9,493k	£14,437k	£14,831k	£14,831k
Amount committed to bursaries	£1,107k	£2,343k	£3,579k	£3,677k	£3,677k
Additional amount committed to outreach	£30k	£30k	£30k	£30k	£30k
Total additional spend	£1,137k (25%)	£2,373k (25%)	£3,609k (25%)	£3,707k (25%)	£3,707k (25%)

Notes

1. Figures based on current domestic UG quota of 2,709
2. Between 2006/07 and 2008/09 inclusive, assumes 8% deferral rate from 05/06 = 216 students not paying higher fees.
3. Quota does not include PGCE– School of Education and Lifelong Learning administer both MSB and additional Scholarship Scheme (see section 2.9)
4. Quota does not include Medical Students – Peninsula Medical School will manage own bursary scheme (sect 2.9)