

University of Oxford

# HEFCE Postgraduate Support Scheme pilot, 2014-15

End of project report





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## Foreword

This report outlines the delivery by the University of Oxford of an 18-month, £3.75m pilot project intended to support progression to taught postgraduate (PGT) study, and to improve our understanding of the barriers that impede access both to study at this level, and to the many benefits associated with such study.

We were delighted to have the opportunity to participate in the HEFCE-funded Postgraduate Support Scheme (PSS) in 2014-15, as its goals resonate so closely with our own strategic vision for supporting postgraduate students. Through the PSS pilot, we have provided financial support for incoming PGT students via a new scholarship scheme, delivered a range of career development opportunities for on-course students, and as part of a longer-term programme of policy research, generated new data and insights into graduate access. The pilot project has made a very real difference to the more than 450 students who participated, and has helped us better to understand how we, and the sector, should enhance support for taught postgraduate study in the future.

Our innovative scholarship pilot, the *Oxford Graduate Scholarships, supported by HEFCE*, has confirmed the hypothesis – which our project aimed to test – that lack of funding is a fundamental barrier to talented, motivated individuals progressing to PGT study. These scholarships have targeted support effectively at students who would not otherwise have undertaken PGT study due to lack of funding, including students from the most disadvantaged of socio-economic backgrounds. Recipients have already told us that receiving full scholarship funding for PGT study has been a transformative experience; we are committed to tracking the impact(s) of this experience on their future achievements.

The dramatic increase in demand for on-course internship opportunities during the PSS pilot confirms that a lack of funding can also prevent students from accessing opportunities that facilitate informed decision-making about further study and career progression. We have developed a new micro-internships scheme to ensure that the benefits of the PSS pilot are not lost.

We will also continue to offer our female master's students the bespoke PGT version of *Springboard*, successfully customised as part of the PSS pilot to



respond to the specific needs, concerns and aspirations of taught postgraduate students, and now available for delivery by other universities to their own students.

The 2014-15 PSS pilot project has successfully raised the profile of issues relating to access to, and support for, PGT study in the UK. In particular, it has confirmed the benefits to be gained from looking across the sector, at the diversity of challenges facing PGT students but also at the many examples of successful innovation by HEIs. We welcome the attention that the PSS has drawn to the critical importance of this stage of study to individuals, society and the economy, and would urge that the momentum generated by this pilot is not lost.



Professor Sally Mapstone  
Pro-Vice-Chancellor (Education)  
and Chair, Oxford PSS Steering Group

## Executive Summary

In 2013 the University of Oxford won the largest single-institution award of £3 million from the Higher Education Funding Council for England (HEFCE) as part of a £25 million pilot scheme to test ways of supporting progression into taught postgraduate education in England and to develop an evidence-base for future policy. The University contributed a further £750,000 from its own funds.

The 20 pilot projects (involving 40 HEIs) have supported more than 2,800 students via activities including mentoring and networking, pastoral support, curricula change, work placements and student funding schemes.

Oxford's Postgraduate Support Scheme (PSS) pilot project has three main aims:

- increasing mobility into and out of taught postgraduate (PGT) study;
- enhancing progression into a wide range of professions including academic research; and
- developing a greater understanding of the barriers to accessing postgraduate education.

In particular, the pilot project has tested to what extent the current lack of funding is a key barrier to accessing PGT study by offering:

- 116 full fees and living cost scholarships awarded to Home/EU master's students on the basis of three criteria: financial circumstances, socio-economic data, and academic merit as assessed through the admissions process. These scholarships brought to over 1,000 the number of scholarships available to students commencing postgraduate study at Oxford in 2014-15;
- 196 funded research internships for current undergraduates to encourage them to consider postgraduate study;
- 102 funded professional internships for current master's students to facilitate informed career progression; and
- a new adaptation for up to 50 female master's students of the highly successful professional development programme for women, *Springboard*, to help address differential rates of career progression compared with men.

This report locates the Oxford PSS pilot in its wider context. It considers lessons learned, and offers recommendations for future postgraduate support initiatives.

## Findings from Oxford's pilot project include:

- The socio-economic background of students is still significant at postgraduate level.
- It is possible to identify disadvantage amongst prospective PGT students.
- There is a high level of unmet need for funding for taught postgraduate study.
- Funding influences student decision-making, and can mean the difference between arrival and withdrawal.
- Scholarships are an essential part of taught postgraduate funding: loans cannot be the only solution to supporting progression to master's-level study.
- Full scholarship funding (covering fees and living costs) enables students to get the maximum benefit from postgraduate study, both academically and professionally.
- The cost of PGT study acts as a barrier to postgraduate research in many subject areas. Supporting PGT study can therefore enable students to pursue an academic career.
- There is a high level of unmet demand amongst Oxford students for funded internship opportunities.
- Female master's students benefit from professional development training that is customised to their specific needs.
- Universities are best placed to devise targeted solutions to supporting PGT students.

A longer-term programme of policy research has also been initiated as part of the pilot project, which (with the support of University funds) is continuing beyond the life of the 2014-15 PSS award. It aims to maximise learning gains from these pilot activities, including tracking the long-term benefits of participation in the PSS for students, and to develop a new evidence-base to support transition to postgraduate study.

## Why is access to postgraduate study important for the UK?

In recent years, the importance of postgraduate-level qualifications to the economy and society, and to professional careers, has attracted increased attention. A range of commentators and researchers have voiced concerns that the current system (in particular, how postgraduate study is funded) represents a “social mobility time bomb”, with serious long-term implications for the country’s economic future (in terms of skills shortages and the diversity of key professions) and for academia, if barriers to postgraduate study are not addressed. These concerns have been compounded by the introduction in England of higher tuition fees for undergraduate study in 2012.

In contrast to undergraduate education, information about access to postgraduate study is incomplete and widely dispersed: postgraduates overwhelmingly apply directly to universities for admission (rather than via a shared UCAS-style system), are of varying ages, tend to take a break between UG and PG study and have a wide range of motivations for studying at PG level. A rapidly developing body of research is emerging that confirms anecdotal and institutional-level concerns about patterns of progression to postgraduate study.

- socio-economic background remains influential at postgraduate level, with undergraduate students from state school backgrounds being more likely (61%) than their privately educated peers (49%) to cite expense and lack of funding as major factors deterring them from PG study.
- more than 25% of state-educated UK undergraduates plan to live at home while undertaking PG study, compared to 16% of those who were privately educated. This has implications both for their academic choices and related on-course opportunities (such as work experience), especially in so-called HE cold spots.<sup>1</sup>

Amongst those students going on immediately to PG study (i.e. within a year of UG study), clear variations in progression can be seen:

- women have lower rates of progression, especially for research degrees. This

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<sup>1</sup> Phillips, C. (2014), *TARGETcourses Postgraduate Study and Funding Survey Report*.

remains the case when controlling for subject discipline and attainment. It is an issue across all subjects.

- there are clear differences in progression to graduate study by ethnic group.
- graduates from lower socio-economic backgrounds are under-represented. This remains the case whether using parental occupational measures, parental education or type of secondary school attended as the indicator.<sup>2</sup>

Furthermore, recorded rates of progression do not reflect the real scale of students’ aspirations to study at postgraduate level. Analysis by HEFCE reveals that:

- of the 17% of UG students who stated an intention to study for a PG qualification in 2013, only 56% did so,
- the rate of progression to further study varied from 64% to 51% depending on whether students came from high or low-participation backgrounds,
- among students who said they were likely to enter PG study, course fees were a factor in decision-making for 65% of respondents,
- for those who said they were unlikely to study at PG level, 61% said that course fees were one of the factors deterring them from considering PG study.<sup>3</sup>

### Note on terminology

**POLAR** looks at how likely young people are to participate in higher education (HE) across the UK and shows how this varies by area. POLAR is used to inform targeting, and support analysis, of widening participation activities.

**ACORN** categorises the UK’s population into demographic profiles and associates these with individual postcodes. It is widely recognised and used by both the public and private sectors to assist in the effective targeting of policies, services and communications.

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<sup>2</sup> Wakeling, P, Hampden-Thompson, G. (2013), *Transition to higher degrees across the UK*

<sup>3</sup> HEFCE (2013), *Intentions After Graduation Survey (IAGS)*.

## Why is access to postgraduate study important for Oxford?

Our vision is that all those with the motivation and academic ability to benefit from postgraduate study at Oxford are able to consider doing so regardless of their personal circumstances, as articulated in the University's 2013-18 Strategic Plan: *"no potential student should be deterred from applying to Oxford by financial or other barriers and that no student's success should be hampered by financial difficulties"*.<sup>4</sup> Diversity of our student body is beneficial to our University, to the society we serve and the knowledge we generate.

At taught postgraduate (PGT) level (the focus of the 2014-15 PSS pilot) initial analysis has identified funding as a key barrier to study at Oxford. Funding for Home/EU PGT students is scarce: most have no access to loans and support from UK Research Councils has declined significantly over recent years and in some cases ceased. Our internal data shows that a demonstrably heavy reliance on personal funds at PGT level is debarring offer-holders without such personal resources from accepting our offers.

- 71% of Home/EU PGT students have self and/or family funding as their only source of funding compared to only 20.5% of Home/EU PGR students.
- Each year we survey graduate offer-holders who have declined their place, to ask why. In 2014, 51% of decliners cited "did not have funding" as their main reason for not taking up their place (response rate 38%). Of those in this group who told us they were taking up a place elsewhere, 72.6% said that funding was an important or very important factor in their decision-making, including many who had decided to travel abroad for postgraduate study.

Home students from lower socio-economic backgrounds are particularly affected by the need for personal resources in making the transition from UG to PGT study at Oxford. For the last eight years, we have incorporated contextual data into our UG admissions by "flagging" the socio-economic characteristics of candidates.

- Home undergraduates who commenced study in 2007-2009, who had the POLAR2 participation flag and progressed to PGT study, experienced significantly longer intervals between UG and PGT study.
- A significantly lower proportion of Home PGT students with the ACORN flag (who began UG study in 2007-2009) are self-funded for PGT study. This suggests that students from lower socio-economic backgrounds are less likely to commence PGT study unless they secure scholarships, loan or similar funding to do so.
- We have used national socio-economic classification (SEC) codes to split Home undergraduates into two groups, *high* (1 to 3) and *low* (4 to 8). The Low group have a lower rate of progression from UG to PGT in four of the six years analysed (2003-08), and no better progression in the other two years.

*"Studying at Oxford is a wonderful experience. I am very grateful for the HEFCE supported Oxford Graduate Scholarship as without it I would have been unable to accept my place on the course. I am the first person to attend university in my family and it would have been a great shame to pass up an offer from such a prestigious university due to lack of affordability."*  
Joanne Hall, MSc Sustainable Urban Development (part-time)



<sup>4</sup> [www.ox.ac.uk/strategicplan](http://www.ox.ac.uk/strategicplan)

## How are we seeking to support access to postgraduate study?

Oxford is seeking to address barriers that impede access to graduate study in a range of ways, including:

- fundraising for graduate scholarships, in particular via the *Oxford Graduate Scholarship Matched Fund*, in which Oxford has invested £80m in institutional matching since 2012 in order to secure endowed donations for graduate study.<sup>5</sup>
- by delivering the largest single institution pilot project under HEFCE's 2014-15 *Postgraduate Support Scheme*.
- offering over 90 bursaries, jointly funded with HEFCE, for taught master's students in 2015-16.
- supporting the *Athena SWAN Charter*, which recognises the advancement of gender equality in higher education and research, including the progression of students into academia.
- delivering the award-winning personal and professional development programme, *Springboard*, for female research students and research staff.

## HEFCE Postgraduate Support Scheme at Oxford

Our HEFCE PSS pilot project focuses on increasing mobility into and out of full-time and part-time taught postgraduate (PGT) study; enhancing progression into a wide range of professions including academic research; and developing a greater understanding of the barriers to accessing graduate education. The award from HEFCE was for £3m (the largest under the scheme), which was leveraged by £750k from the University.

### Support for incoming PGT students

- 116 full fees and living cost scholarships awarded on the basis of academic merit, socio-economic background, and financial need

### On-course support for career development

- 196 funded undergraduate research internships to encourage progression to postgraduate study

- 102 funded professional internships to facilitate informed career progression by current master's students
- an adaptation for female master's students of the successful development programme for women, *Springboard*, to help address differential rates of career progression compared with men

### Policy research programme

- a three-year policy research programme into barriers to PGT study.



*"The scholarship has changed my life and opened me up to immense possibilities. Each day I am thankful for the scholarship as without it I would not have been able to experience the joys of Oxford, the networking and learning I have done so far. The scholarship has had an immense impact!"*

Anulika Ajufo, MSc Law and Finance

## Support for incoming PGT students

The *Oxford Graduate Scholarships*, supported by HEFCE have been designed to promote access to PGT study for UK and other EU students, and to test the influence of funding on access to PGT study. For the first time for a university-wide graduate scholarship, this innovative scheme selected on the basis of socio-economic

<sup>5</sup>For more information on the Oxford Graduate Scholarship Matched Fund, see page 15, or <http://www.ox.ac.uk/about/organisation/annual-review/ar2013-14/features#content-tab--5>



background and financial need, in addition to academic merit.

Applicants were required to have Home or EU fee status or be ordinarily resident in the EU, and to have been offered a place on an eligible PGT course at Oxford, for study commencing in 2014-15. The scholarships covered 100% of University and college fees and a grant for living costs, and were awarded for the full duration of students' fee liability for their course.

### On-course support for career development

As part of the PSS pilot, we have delivered three activities to support our current students in progressing to postgraduate study and professional careers, including academic research:

1. the **Oxford Undergraduate Research Programme** has aimed to stimulate progression to postgraduate study by offering funded research internships;
2. the **Oxford Postgraduate Internship Awards** has aimed to bridge the gap between university and graduate careers by offering funded professional internships; and
3. an adaptation of **Springboard for female master's students**, which aims to equip participants to develop their skills and abilities to help address gendered patterns of achievement.

Internships are increasingly important – they boost employability, open the doors to the professions and support informed decision-making about further study and career pathways. The PSS-funded internships have covered travel, living costs, accommodation (and for international opportunities, visas, immunisations, and insurance) for 6-8 week placements over the 2014 and 2015 summer vacations. The research placements were open to Home/EU undergraduates and the professional placements to Home/EU PGT students.

Oxford's adaptation for the PSS pilot of the highly successful women's development programme, **Springboard**, was tailored to the needs and concerns of female master's students. The course consists of three consecutive full days of training at the end of term, plus a follow-up workshop at the start of the following term. Thanks to PSS funding and sponsorship from Shell, the course was free to participants.

### Policy research programme

The final strand of the project is devoted to deepening our understanding of under-representation at postgraduate level and developing a larger evidence-base for future interventions. The University has invested in a new post of Graduate Access Manager to identify barriers to postgraduate study and to work across Oxford to develop and trial approaches to removing these barriers. Monitoring and evaluation of the outcomes of the 2014-15 pilot also remain a key component of this ongoing programme of research into graduate access issues.



*"Having just paid back my commercial bank loan that was taken out to pay for my master's degree, there was zero chance I could be interning anywhere, let alone abroad. Funded internships are vital to the career progression for students. My funded internship allowed me to gain real day-to-day insight into my chosen profession, develop my skill set and knowledge base, strengthen my CV, and begin to form my industry network. It has allowed me to get my foot in an otherwise closed door."*

Garlen Lo, MSc Social Anthropology

## What did we find?

### 1. Scholarships

#### a) Funding influences entry to PGT study

##### **There is a high level of unmet need for funding for taught postgraduate study.**

1191 eligible candidates were invited in spring 2014 to apply for a PSS scholarship and 75% of all those eligible (894) chose to apply; this represents approximately nine applicants for every award we were able to fund. 38% of scholarship applicants stated that they were unlikely to take up their offer of a place unless they secured funding.

##### **Funding can mean the difference between arrival and withdrawal.**

We have analysed the admissions outcomes of those eligible PGT offer-holders who applied unsuccessfully for a PSS scholarship, by comparing the rate of withdrawal with applicants' responses to the question, "*[f]rom a financial perspective, how likely is it that you will be able to take up the offer of your place for graduate study at Oxford if you do not receive this scholarship?*". 61% of all unsuccessful scholarship applicants who had stated when applying that it was not at all likely they'd take up their place without the scholarship (the most negative option available) did indeed withdraw. This withdrawal rate is almost double the institutional average for those courses which were eligible for PSS funding in 2014-15. Within the subset of those unsuccessful applicants whom we were unable to fund, but who had been assessed as high-priority on the basis of their socio-economic and financial data, 45% of those who were least positive about their options ultimately withdrew from their place at Oxford.

##### **Funding influences student decision-making.**

The pilot's focus on funding as a barrier to PGT study was justified, as analysis reveals the centrality of funding to student decision-making. 44% of PSS scholarship applicants who responded to our applicants survey said they were applying for a scholarship because they would be unable to accept their offer of a place without funding. We subsequently asked our PSS scholars to assess the relative significance of various factors in deciding where to study. The factors accorded most importance were:

- 1) institutional reputation;
- 2) quality of teaching;
- 3) availability of scholarship funding at the university in question; career value of the qualification (equal third); and
- 4) quality of research.

97% of our PSS scholars considered the availability of scholarship funding to be an important factor in deciding where to study, compared with 64% of the wider Oxford PGT population<sup>6</sup>. PSS scholars were further asked what would have been the minimum amount of funding they would have needed in order to take up their place if they had not been awarded a PSS scholarship; 45% selected 'not applicable as I would have been unable to come without a full scholarship', and 14% of respondents selected £15,000, the highest amount specified.

Among the cohort of PSS scholarship recipients, the current lack of funding for PGT study has encouraged students to take a break between UG and further study. Wider analysis of Oxford PGT students on PSS-eligible courses suggests that this may be a more general motivation, with almost half of those whom we invited to apply for a scholarship having taken a break of twelve months or more after UG study.

##### **Scholarships are an essential part of taught postgraduate funding: loans cannot be the only solution to supporting progression to master's-level study.**

The proposed government loan system for master's-level study, whilst welcome, will not suit all students, even amongst those likely to be eligible to take it up. We asked our PSS scholars what their interest might have been in alternative forms of postgraduate funding if they had not been offered a full PSS scholarship. Would they have been interested in either:

- 1) one of the £10k bursaries that have been offered for PGT study in 2015-16 by Oxford and other HEIs (in conjunction with a second round of HEFCE PSS funding); or
- 2) a £10k loan (as currently proposed by BIS for students commencing PGT study from 2016-17)?

The prospect of a partial (£10k) bursary was popular, with 94% of respondents expressing interest. We intend to ascertain whether this accurately reflects the ability of partial awards to address the funding barrier to PGT study, by

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<sup>6</sup> source: Student Barometer 2014

comparing the decline and withdrawal rates of the 2014-15 PSS scholarship scheme and the 2015-16 bursary scheme. To date (September 2015) the bursary scheme has experienced an 15% rate of offer-holders declining awards (almost four times that of the PSS scholarships); the reason most frequently given for doing so is an inability to secure the additional funding required, beyond the £10k offered via the scheme.

## b) Funding influences student outcomes

### **Full scholarship funding enables students to get the maximum benefit from postgraduate study, both academically and professionally.**

Qualitative data reveals the importance of funding to students realising their full academic potential and maximising the value of the PGT student experience, both whilst on-course and in the longer-term. Many scholars have told us that receiving the PSS scholarship allowed them to focus on their studies; one scholar explains that “I have always had to balance my studies with part-time work and this could be very stressful at times. The scholarship has meant that I could focus purely on studying and not have to worry about financial matters.”

Without the need to juggle part-time work, PGT students have more capacity to participate in activities such as volunteering, community consultancy, and attending lectures outside their discipline. One response captures the long-term importance of such activities: “I have co-managed the course blog, and have attended evening lectures and spent time with friends in the evening occasionally. While these are not a lot - they are far more than I managed when an undergraduate student due to paid work commitments - and would not have been possible had I taken a part-time job here. ... Opportunities and ideas are less likely to arise if you don't talk to people - and the isolation brought by struggling financially is another barrier to getting a good career.”

### **The cost of PGT study acts as a barrier to postgraduate research in many subject areas. Supporting PGT study therefore enables students to pursue an academic career.**

For subjects such as languages and literature, law, history, social sciences, and architecture, amongst others, a taught master's is increasingly a critical bridge to PGR study. Aspirations towards an academic career were a primary

motive for many PSS scholars in seeking to undertake a master's degree.

For many of our scholarship recipients, providing financial support for PGT study has enabled them to consider progressing to postgraduate research; one scholar said that not receiving funding for their master's course “would have meant a complete rethink of my life plans, and doing something which I would have wanted to do a lot less.” 59% of PSS scholarship recipients have expressed a desire to undertake a research degree, either in order to pursue an academic career, or to develop further their expertise in a professional specialism. A quarter of PSS scholars have accepted an offer of a PGR place at Oxford in 2015-16, and a third of these have already secured confirmed scholarship funding to support doctoral study, suggesting that, for at least some of our scholars, the PSS scholarships have indeed bridged the funding gap between undergraduate study and a research degree. One such scholar is James White, who is about to commence his doctoral research in Arabic and Persian literature:



*“The scholarship has allowed me to pursue my chosen career in academia, in a way that otherwise would have been impossible. I would not have undertaken further study without this award.”*

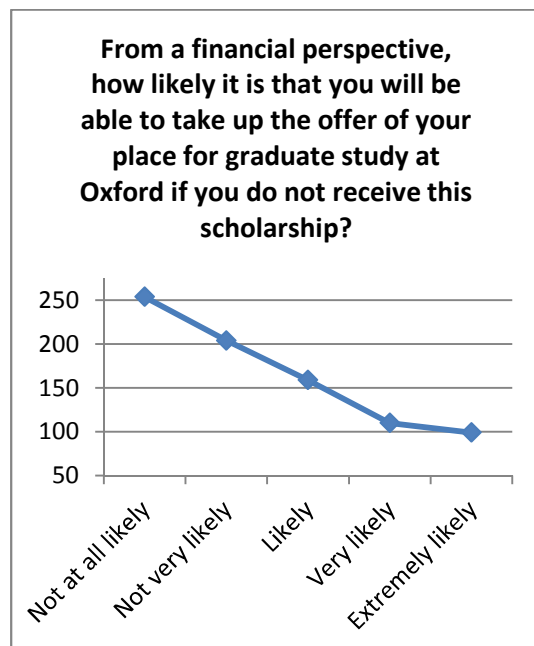
James White, MSt Oriental Studies

Finally, scholar feedback reveals that the role played by scholarship funding goes beyond that of simply widening the range of opportunities available to students from under-represented backgrounds – it also helps give students the confidence to pursue these opportunities: one scholar has told us that “[the scholarship] has made me feel like a valued part of the department.”

### c) The socio-economic background of students is still significant at postgraduate level

#### The influence exerted by funding varies according to socio-economic background.

We asked scholarship applicants (as part of the scholarship application) to indicate how likely it would be that they would be able to take up their offer of a place at Oxford if they did not get the scholarship. There was a clear linear correlation between applicants’ degree of educational disadvantage (as assessed via the scholarship application form), and how they answered this question, with the most disadvantaged applicants being more likely to say that they couldn’t come without the scholarship.



75% of eligible candidates chose to apply for a PSS scholarship. This suggests that many prospective PGT students perceive themselves to be from relatively disadvantaged backgrounds.

#### Students’ experiences of UG study and funding systems influence their ability to progress to, and attitudes towards, PGT study

The experience of undergraduate funding systems exerts a striking influence on attitudes and choices relating to postgraduate funding. Overall, we found that UK-domiciled PSS scholars took longer to progress to PGT study, were more likely to undertake paid work prior to PGT study, and were more willing to borrow to finance PGT study, than those domiciled in the rest of the EU, who had (in general) encountered far lower costs for UG study. This might be a feature specific to our cohort of 2014-15 applicants, rather than being more generally applicable; it should also be noted that it entails a comparison between UK students planning to study locally and (other) European students who are planning to study abroad – who are not necessarily fully equivalent populations, in terms of non-financial resources such as cultural capital and confidence. Nonetheless, it is clear that the current gap in funding of PGT study poses a real and serious obstacle to progression by graduates of English HEIs from under-represented backgrounds.

*Timing of progression:* the majority (51%) of UK-domiciled scholarship recipients had taken a gap of a year or more before progressing to PGT study. The overwhelming majority (79%) took a gap of 1-3 years, and spent it working full time (68%), suggesting that the current funding environment requires UK-domiciled prospective students to defer progression to PGT study until sufficient savings can be accrued. In contrast, only a fifth of PSS scholars from the rest of the EU had taken a gap of a year or more, primarily (89%) for 1-3 years, and only a very small number (25%) had spent this period working full time.

*Borrowing and debt:* over 90% of our UK PSS scholars have debt outstanding from UG study, compared with less than a third of scholars from the rest of Europe (32%). We asked scholars what their attitude would have been towards a £10k loan, if they had not received full scholarship funding. The level of interest in a loan varied significantly between UK and EU students. 74% of UK-domiciled PSS scholars expressed interest in a loan, but of the quarter of UK scholars who were not interested, the overwhelming majority (80%) cited the accumulation of further student debt as their primary objection. This is further substantiated by the attitudes of scholars towards the current PGT funding system: one scholar has explained that “without the scholarship, I would have found it very difficult to fund my master’s. The debt I would otherwise have accumulated would prevent me from going on to doctoral

studies.” More than a quarter (27%) of those who were not interested also expressed concern about the impact of a loan on their future credit-worthiness. Given that the 2014-15 PSS pilot was timed such that it did not include students who have paid the higher tuition fees introduced from 2012, will forthcoming cohorts of UK graduates with much larger debts be even more averse to further borrowing?

PSS scholars from the rest of Europe were less interested in a loan, with only 42% expressing interest. 78% of those students who were not interested stated that their primary objection was an aversion to incurring debt, with only 17% concerned about adding to existing debt, and even fewer (13%) worried about future credit-worthiness.

#### **d) It is possible to identify disadvantage amongst prospective postgraduate students**

The scholarship selection process that we devised enabled us to select prospective postgraduate students for funding on the basis of several factors relating to socio-economic background and current financial need in addition to academic merit, in a manner that was rigorous, consistent and administratively manageable. Eligible offer-holders were invited to complete an online questionnaire that collected the additional data needed to:

- identify educational disadvantage in the final year of secondary school, including parental and neighbourhood characteristics; and
- determine financial need in the year immediately preceding PGT study.

Indicators that are specific to age or national groups were avoided, and a scoring process was devised that obviated the need for subjective assessments of applicants’ personal circumstances. Income was assessed relative to income levels in the applicants’ own country, thus avoiding issues associated with comparing widely diverging economic and social contexts across the EU.

Statistical analysis of the scholarship application process has confirmed that it effectively identified disadvantage in both Home and EU applications – there was no statistically significant variation in success rates – and did not disadvantage applicants with protected characteristics (e.g. gender, ethnicity and disability). In addition, all applicants with a background in public care were selected for scholarships.

*“The scholarship had a huge impact on me, because without it I would not have been able to take up my place at the University of Oxford. I am the very first member of my family to study at university, and even though student loans are available in Germany, you can only get one if you study in Germany. The scholarship gave me the opportunity of a lifetime – and I’ve realized that I feel at home in an academic environment. When I first received my letter of acceptance, I didn’t really think that I was fit to study at Oxford, and that it wouldn’t be the right place for me but now I know I am, and it was. I was encouraged to pursue my academic career further, and I am starting a PhD in English Literature at the University of York in October.”*

Lotta Schneidemesser

MSt World Literatures in English



Whilst we can only verify student records information that is internal to Oxford, we have asked the full PSS scholarship cohort to report whether as undergraduates they had received funding on the basis of low family income or financial need (we did not include this as a selection criterion for the scholarships because of the high degree of variation across the EU in state provision of funding to support UG study, as well as the uneven offering of institution-level funding within national systems, and the variation in the types and levels of funding available across age cohorts). 63% of UK and 55% of EU PSS scholars had received such funding as undergraduates. Taking into account the highly uneven provision of

such UG funding, this cohort-wide average of 60% suggests that PSS scholars genuinely lack the private resources needed to fund PGT study.

As part of our advertising campaign for the PSS scholarships, we targeted publicity at final-year Oxford undergraduates who were in receipt of a means-tested Oxford Bursary; the University offers these non-repayable bursaries to Home/EU students from low-income households to help with living costs during study. 75% of PSS scholars who had been undergraduates at Oxford received one of these low-income bursaries; comparison with the Home UG average for receipt of an Oxford Bursary (approximately 25%) demonstrates that our selection methodology was effective in identifying prospective students from low-income backgrounds who would not otherwise have been able to afford PGT study.

## 2. Career development support

### a) There is a high level of demand for funded internships amongst Oxford students.

The Oxford Undergraduate Research Programme (OURP) and the Oxford Postgraduate Internship Awards (OPIA) both attracted large numbers of applications, with on average nine applications for every placement offered in 2014, and 9.5 applications for every placement in 2015. Moreover, through offering a large number of PSS-funded internship opportunities over two consecutive years, the Internship Office has significantly expanded the profile of the University's existing internship programme, and attracted significant new demand beyond the number of additional funded placements available. This was most pronounced in 2014, with a 27% increase across all internship applications, and still significant in 2015 with a further increase of 21%.

The PSS-funded OURP placements received a disproportionately high number of applications. Several factors could contribute to this higher level of demand: for example, providing a taster of research work for undergraduates, who may as yet be unsure of their goals after study, might be more attractive than providing a professional work placement for taught postgraduate students who have already identified a relatively specialised area of work, and perhaps already have an offer of post-study employment. It is also possible that for students on twelve month, full-time PGT courses of study, it is not always practical to undertake a work placement during the summer vacation.

Oxford will be evaluating the Internship programme in 2015-16 in order better to understand the contours of student demand for internships, and the possible sources of future funding in order to ensure that they remain accessible to all students.



*"Prior to the internship, I was not keen on the idea of a career in research ... This internship has taught me how exciting research can be, and that if I were to do postgraduate research, it would be in the bio side of Chemistry ... I feel much more ambitious having had this experience".*

Eleanor Thurtle  
second year Chemistry undergraduate

### b) Interns report meaningful academic and professional benefits from completing a funded placement.

75% of master's students who completed a professional internship in 2014 report having made contacts and developed networks that they think will help them pursue their career goals. 62% thought that they had acquired transferable skills which complemented their master's degree. For

example, an Archaeology student who interned at the Ashmolean Museum of Art and Archaeology reports that the placement provided a nuanced, realistic picture of work within the museum sector. Informed decision-making is key to the placement experience: 59% of undergraduate students who completed a research internship in 2014 report having a better understanding of postgraduate study and research careers. 42% have identified a research topic that they want to study as a result of their internship experience.

### **c) Employer interest in hosting funded interns is strong.**

Host organisations have responded very positively to the partnering opportunity represented by the PSS-funded internships. The availability of PSS funding has enabled the Internship Office to engage 87 new host organisations, 69 of which are international, and to deepen existing relationships with other host organisations.

As evidence of the ongoing impact of the PSS-funded internships, several local organisations which offered placements under one or both of these programmes (such as the Oxford Preservation Trust and the Ashmolean Museum of Art and Archaeology) have joined a new, successor scheme of micro-internships. Launched by the Internships Office in response to the end of the PSS pilot funding, micro-internships consist of shorter placements at local organisations.<sup>7</sup>

### **d) Female master's students benefit from customised professional development training.**

The two cohorts who have completed the new version of *Springboard*, adapted to the specific issues faced by taught master's students, report a range of positive impacts arising from participation in the programme:

- 88% have clarified their career and study goals;
- 83% feel more confident in work environments; and
- 93% say that they are more likely to approach challenges positively.

One graduate of the *Springboard* pilot describes its impact thus: "I got the rare chance to take some time to reflect and think about what I want, what I am good at, and what I am struggling with. Doing this in a supportive environment, with individuals who, although strangers, want the best for you,

can have the most meaningful impact on your life."

The effectiveness of the pilot *Springboard* programme is reflected in the fact that it will continue to be provided on a twice-annual basis by the University's Careers Service, with sponsorship having already been secured for the two 2015-16 cohorts.

## **3. Universities are best placed to devise targeted solutions to supporting PGT students.**

Universities are able to develop postgraduate support programmes that are appropriate to their academic mission, subject provision, and geographic location. Oxford's PSS pilot activities have built successfully on our prior experience in delivering graduate scholarships and career development programmes to our students.

## **4. Note on data**

The above findings are derived from the collection and analysis of data as part of this pilot. They are drawn from the analysis of a large sample population: almost 1200 PGT offer-holders were eligible candidates for the 116 scholarships offered through the PSS (with approximately 900 candidates choosing to apply); almost 300 internship placements have been offered over the two years of the pilot, and 47 students have completed the new PGT version of *Springboard*. The large dataset creates opportunities to produce research of relevance to the sector, though it should be emphasised that (with the exception of the internship programmes) it relates to a single year's data only, and therefore relies on the characteristics of one cohort of applicants and students. There are limits to what can reliably be concluded on the basis of one year's data, and as most of the indicators collected through PSS had not been collected previously, we are unable to assess how representative the 2014-15 cohort of Home/EU students on PSS-eligible courses at Oxford is compared with other years. This is compounded by differences in eligibility criteria between Oxford's 2014-15 pilot scholarship scheme and the 2015-16 PSS bursary scheme, which limit the comparability of the two cohorts. Given the acknowledged need for reliable data on PG study, this further supports the argument that sustainable initiatives, running over several successive years, are needed in order to understand and support fair access to PG study.

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<sup>7</sup> See page 15 for more information.

## What would we recommend for future interventions?

The following insights arise from the design and delivery of Oxford's PSS-funded pilot scholarship scheme, and therefore relate specifically to the development of future postgraduate finance schemes, whether re-payable or non-repayable in nature, and institutional or national in scope.

In order to maximise the impact on progression to PGT study by students from under-represented groups, we would recommend that the following features are incorporated in any scheme:

1. Be *consistent and predictable*, so that undergraduates and graduates can plan ahead for postgraduate study on the basis of support being available in successive years. Continuity also enables institutions to refine the delivery of support systems over time.
2. Be *sensitive to the more complex planning needs of postgraduate students*, such as applying for leave from work, and securing accommodation and childcare. We made scholarship offers over four months before the start of the academic year (as soon as was feasible, given the timing of the HEFCE award) to ensure that scholarship recipients encountered as few practical barriers to PGT study as possible. Only five of 121 successful scholarship applicants declined an offer.
3. Be *highly visible and actively promoted*, so that take-up is not reliant on prospective students' social capital or personal confidence. A recent survey suggests that only half of UG students graduating in 2015 are aware of the proposed government PGT loan scheme due to be implemented for 2016-17 entry.<sup>8</sup> We invited all eligible offer-holds to apply for the PSS scholarships, thus ensuring that all potential candidates were aware of the scheme. 75% of those invited to apply did so; when surveyed, 72% of applicants indicated that they first heard of the scheme via this invitation.
4. Be *open to all subject areas*, as any subject focus (such as STEM-only) is likely to cause supply-side distortions and exacerbate under-representation in unsupported subjects. Recent reviews have

demonstrated that all subject areas have a range of significant societal and economic impacts.<sup>9</sup>

5. Be *available for part-time study*, including at less than 50% intensity, given that mature students and those with caring and other responsibilities have a greater need for flexibility in course provision.

6. Be *open to those with prior PG qualifications*, so as not to prevent individuals contributing more fully to the economy by training for a change of career. Restrictions on students with Equivalent or Lower Qualifications (ELQ) can also serve to inadvertently exclude students with disabilities, who are otherwise exempt from this restriction.

7. Be *available to students regardless of age*, as individuals from disadvantaged backgrounds are more likely to experience interruptions to their academic and professional lives.

8. Be *flexible, particularly in relation to deferment*. This is particularly important for postgraduate students from disadvantaged backgrounds who are more likely to have caring responsibilities and other complex personal circumstances. Deferment was not possible under the pilot project due to the time-limited nature of the HEFCE funding award.

Overall, we would emphasise that eligibility criteria should be kept as open as possible, in order to ensure that the highest-priority individuals can be identified and targeted for support.

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<sup>8</sup> *Debt in the first degree: attitudes and behaviours of the first £9k fee paying graduates*, NUS, 2015.

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<sup>9</sup> see, for example, the outcomes of the 2014 Research Excellence Framework: <http://www.hefce.ac.uk/pubs/rereports/Year/2015/analysisREFimpact/>



## Beyond the 2014-15 Postgraduate Support Scheme: initial project legacies

The relevance of the pilot activities delivered by Oxford as part of its 2014-15 PSS award is indicated by the high level of interest in devising successor activities.

### Scholarships

The lessons learned from the design and implementation of our pilot scholarship scheme will continue to inform our future development of support for postgraduate students, in addition to having already shaped our delivery of the PSS bursaries for 2015-16.

Oxford remains highly committed to fundraising for postgraduate scholarships as a key strategic priority for the University; in particular, since 2012 we have invested £80m in institutional matching via the *Oxford Graduate Scholarship Matched Fund*; when matched with £120m of donor funds, this will create a £200m endowment which will provide full funding support in perpetuity for at least 264 postgraduate students on course at Oxford at any one time. We remain keen to support donors in targeting funding at those students in greatest need of support and the findings of the PSS pilot are already feeding directly into this ongoing work.

### Internships

While it will not be possible to provide PSS-funded placements beyond the life of the PSS, we intend to build on its achievements by:

- continuing proactively to seek additional placements at new host organisations and undertaking fundraising to support these;
- encouraging host organisations to support the *Moritz-Heyman Internship Programme*, which offers tailored internship support to undergraduate students at Oxford from low-income backgrounds; and
- offering a new programme of micro-internships from summer 2015. These condensed local placements expose students to work in a sector of interest, offering many of the advantages of longer placements, whilst minimising interns' costs and providing a sustainable legacy for PSS funding.

## Springboard for female master's students

This innovative programme of professional and personal development training will continue to be provided on a twice-annual basis by the University's Careers Service. Sponsorship has already been secured for the two 2015-16 cohorts.

### 2015-16 HEFCE PSS Bursaries

The 2014 Autumn Budget Statement confirmed that HEFCE would allocate £50 million to HEIs to offer 10,000 bursaries, each worth £10,000, on a 50/50 match-funded basis. These bursaries are intended to bridge the gap between the 2014-15 PSS pilot projects and the proposed introduction from 2016-17 of income-contingent loans for master's-level study.

Over 90 *Oxford Graduate Bursaries*, supported jointly and equally by HEFCE and the University, have been awarded for a wide range of taught master's courses at Oxford, starting in 2015-16. Recipients have been selected on the basis of financial circumstances and socio-economic data in addition to academic merit as assessed through the admissions process.

In addition to the eligibility criteria applying to the *Oxford Graduate Scholarships, supported by HEFCE*, bursary applicants were required to be "progressing from an undergraduate course for which they were charged the higher tuition fee applying since 2012-13".

## Concluding remarks

The design and implementation of Oxford's four PSS pilot activities has already produced many lessons learned, and has generated evidence to confirm hypotheses previously based on more anecdotal understandings of barriers to PGT study. We expect that the monitoring of the pilot projects' outcomes, and the wider programme of research into graduate access, will continue to generate new insights in the medium-to-long term.

At this time, however, as pilot activities draw to a close, the following overarching issues bear restating. Several of them are common to many of the PSS pilot awards:

1. Longer-term initiatives are needed effectively to reach, engage with and support those individuals who may benefit most from PGT study. Continuity in provision will in particular help in targeting those prospective postgraduates who are currently difficult to identify, because they have not yet decided to apply for a PGT course.
2. Undergraduate students need greater support at an earlier stage in their degrees to make informed decisions about further study.<sup>10</sup> There is demonstrable interest amongst undergraduates in receiving this support, as indicated by the very high level of demand for research-related UG internships in the Oxford PSS pilot. Advice, mentoring and experience-based opportunities such as research internships and summer schools may all have an important role to play.
3. Data sharing between HEIs to support progression, and the delivery of collaborative outreach activities in relation to PG study, remain challenging due to regulatory contexts and institution-level recruitment priorities. Sector-wide support (as was provided by HEFCE via the PSS pilot) for the sharing of best practice, *and* for the identification of priority candidates, would increase the impact of future postgraduate support programmes.
4. The ultimate value of the interventions piloted through the 2014-15 PSS will only become apparent through long-term monitoring of project impacts, particularly on student beneficiaries. Continued engagement by HEFCE in the evaluation and dissemination of pilot projects' outcomes will

be critical to an informed, evidence-based public debate about support for postgraduate study.



*"Without this scholarship I would not have been able to study at Oxford. Reading manuscripts and having access to other rare materials in the Bodleian has had a fundamental impact on the way I approach my subject. I am grateful for the opportunity to have worked alongside world-class scholars and students."*

Hudson Heffer, MSt English (1550-1700)

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<sup>10</sup> R. Mellors-Bourne, *Recent graduates' perspectives on access and progression to taught postgraduate study* (CRAC, 2015).

## Selected publications

- Atherton, G. et al (2015), *Does Cost Matter? Students' understanding of the higher education finance system and how cost affects their decisions* (National Education Opportunities Network)
- Bachan, R. (2014), 'Students' expectations of debt in UK higher education', *Studies in Higher Education* 39(5)
- HEFCE (2013), *Postgraduate education in England and Northern Ireland: Overview report*
- HEFCE (2013), *Trends in transition from first degree to postgraduate study*
- Lindley, J.; Machin, S. (2013), *The Postgraduate Premium: Revisiting Trends in Social Mobility and Educational Inequalities in Britain and America* (Sutton Trust)
- Mellors-Bourne, R. (2015), *Recent graduates' perspectives on access and progression to taught postgraduate study*, Careers Research & Advisory Centre (CRAC)
- Mellors-Bourne, R. et al (2014), *Understanding how people choose to pursue taught postgraduate study*, report to HEFCE by CRAC and iCeGS
- Milburn, A. (2009), *Unleashing Aspirations: the Final Report of the Panel on Fair Access to the Professions* (Panel on Fair Access to the Professions)
- National Union of Students (2015), *Debt in the first degree: attitudes and behaviours of the first £9k fee paying graduates*
- Phillips, C. (2014), *TARGETcourses Postgraduate Study and Funding Survey Report*
- Wakeling, P.; Hampden-Thompson, G. (2013), *Transition to higher degrees across the UK: an analysis of national, institutional and individual differences* (Higher Education Academy)

## Selected links

### Department for Business, Innovation and Skills

Postgraduate study: student loans and other support

<https://www.gov.uk/government/consultations/postgraduate-study-student-loans-and-other-support>

### Equality Challenge Unit

Athena SWAN Charter <http://ecu.ac.uk/equality-charters/athena-swan/>

### Higher Education Funding Council for England

Announcement of the 2014-15 Postgraduate Support Scheme

<http://www.hefce.ac.uk/news/newsarchive/2013/Name,93972,en.html>

Intentions After Graduation Survey (IAGS) analysis <http://www.hefce.ac.uk/analysis/Overview/>

The nature, scale and beneficiaries of research impact

<http://www.hefce.ac.uk/pubs/rereports/Year/2015/analysisREFimpact/>

### University of Oxford

HEFCE Postgraduate Support Scheme at Oxford [www.graduate.ox.ac.uk/hefce](http://www.graduate.ox.ac.uk/hefce)

Strategic Plan 2013-18 [www.ox.ac.uk/strategicplan](http://www.ox.ac.uk/strategicplan)

Oxford Graduate Scholarship Matched Fund

[https://www.campaign.ox.ac.uk/priorities/students/grad\\_matched\\_fund.html](https://www.campaign.ox.ac.uk/priorities/students/grad_matched_fund.html)

<http://www.ox.ac.uk/about/organisation/annual-review/ar2013-14/features#content-tab--5>

Internships Programme

<http://www.careers.ox.ac.uk/internship-office-and-work-experience/the-internship-programme/about-the-internship-programme/>

Micro-internships Programme

<http://www.careers.ox.ac.uk/internship-office-and-work-experience/micro-internships-for-students/>

Springboard programme for female master's students

<http://www.careers.ox.ac.uk/our-services/springboard/>



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