

This Access Agreement between Newcastle University and the Office For Fair Access (OFFA) covers the period from 1 September 2010 until 31 August 2011 (academic year 2010-2011). It relates to Home UK undergraduate and PGCE students entering the University from September 2010 and continuing students who entered in 2009. Students who entered the University in 2007 or 2008 should also refer to the University's separate Access Agreements for the relevant years of entry for further details of the schemes that apply to them.

1. Introduction

- 1.1 Newcastle University is committed to widening participation and fair access. We wish to encourage able, highly-motivated and enthusiastic students of all ages, and from all backgrounds and contexts, to apply to our degree programmes.
- 1.2 Our students come from all parts of the UK, and typically more than 75% are from outside the North East. As a civic university which engages fully with our community, the city and the region, our Widening Participation Strategy includes extensive work with schools and colleges in target areas to promote progression, participation and flexible access. We also seek to attract and retain students of high ability and potential from all parts of the UK, and our Access Agreement and bursary commitments reflect these aims.
- 1.3 Our admissions policies and practices are based on principles of integrity and fairness, and involve the assessment of each applicant's ability, achievements and potential.
- 1.4 We wish to admit the brightest and best students, regardless of background. We recognise that some of those students may have concerns about the financial costs of Higher Education. The bursary scheme described in this Access Agreement, available for UK students commencing undergraduate or PGCE programmes in 2010 (and continuing students who entered in 2009), will provide additional financial support for many of our students.
- 1.5 We also know that many talented and able people do not feel confident about applying to university. This may be because they have no family experience of higher education, or because they lack confidence about their ability to achieve the necessary entry requirements for a university like Newcastle. We are committed to investing in additional outreach work with schools and colleges in order to encourage more people to achieve their potential and enjoy the life-long benefits of higher education.
- 1.6 For those who choose to study at Newcastle University, we are confident that we offer challenging, exciting and relevant degree programmes, taught by experts whose research enriches the learning environment for all of our students. The overall 'Newcastle experience' is underpinned by our strong commitment to the provision of outstanding opportunities for our students to add value to their academic studies by gaining additional skills and experience which will prepare them for rewarding careers. Our strengths in enterprise education and vocationally-relevant programmes are reflected in our exceptional record of graduate employability.
- 1.7 These commitments and principles set the context for this Access Agreement, details of which are shown in the sections which follow.

2. Fee Limits

- 2.1 Newcastle University will charge an annual (home rate) tuition fee of **£3,290** for all of its eligible full-time undergraduate degree programmes and for the Postgraduate Certificate in Education (PGCE) programme in the academic year 2010-11. This fee also applies to all returning undergraduate students who entered the University from 2006 onwards.
- 2.2 Certain undergraduate programmes (or parts of programmes) funded under contract by the Department of Health will not be subject to the tuition fee of £3,290. At Newcastle University, this currently includes the following programmes: Speech and Language Sciences; the fifth year of the 5 year programmes in Medicine and Dentistry; years two, three and four of the four-year accelerated Medicine degree for graduates.
- 2.3 Students on four-year programmes who are undertaking a one-year placement, or a year abroad, as a compulsory part of their degree programme, will be liable to pay the relevant proportion of the annual tuition fee (25% of the full fee, i.e. £822.50 in 2010-11).

- 2.4 Subject to regulations published by the government each year, the annual home rate of tuition fee charged by the University is expected to increase to reflect inflation. The fee is reviewed annually, in the light of guidance from the Department of Business, Innovation and Skills (DBIS), and the amount payable in any given year will be published in advance by the University in the relevant publicity materials, including the University website.
- 2.5 The University's bursaries and other financial support offered to eligible students are reviewed each year.
- 2.6 Students who are offered a place at the University will be informed of the total fees payable for the duration of their programme of study (based on estimates of the likely fee amounts to be confirmed by the DBIS each year).

3. Widening participation context and target groups

- 3.1 This Access Agreement is part of the University's overall strategies to widen and increase participation by groups of students currently under-represented at the University. Widening participation is an important element of the University's Corporate Plan and strategic objectives.
- 3.2 The University's progress in widening participation, as measured by its intake each year of students from key groups under-represented in higher education, is published publicly in the annual HESA Performance Indicators.
- 3.3 The outreach activities and investment described in this Agreement represent just a small part of the University's overall work to widen and increase progression to higher education. The University has undertaken an intensive programme of widening participation activity, working with schools and colleges in the North East over the past 16 years (see Section 7, below, and Annex 1). This work will be sustained and developed during the period of this Agreement, subject to the continued availability of funding. Further details are provided in the University's Widening Participation Strategic Assessment, submitted to the Higher Education Funding Council for England (HEFCE) in June 2009.
- 3.4 For the purposes of this Access Agreement, the University's *additional* outreach work and financial investment to maintain and safeguard fair access are aimed particularly at students of high ability and potential from the following groups:
- Students from lower socio-economic groups
 - Students from low participation neighbourhoods
 - Students from black and minority ethnic groups
 - Students with a disability
 - Students who are from lower income backgrounds
 - Looked After Children/ those from a care background
 - Students with a range of relevant other personal or educational disadvantage factors, including those who enter the University through the PARTNERS Programme supported entry route.
- 3.5 The **additional measures** described in Sections 4, 5, 6 and 8 specifically aim to:
- Increase the number and proportion of applicants with appropriate qualifications, ability and potential, from: lower socio-economic groups; low participation neighbourhoods; black and minority ethnic groups; Looked After Children and those with other relevant personal or educational disadvantage factors
 - At least maintain the application and progression rates to the University of students with a disability
 - Encourage more students from lower-income backgrounds to feel confident that they will receive adequate levels of financial support if they choose to study at Newcastle University
 - Increase progression to Newcastle University of students from lower income backgrounds from all parts of the UK and contribute to an overall increase in regional rates of progression to higher education
 - Encourage the highest-achieving students from lower income backgrounds to consider studying at Newcastle University
 - Support students from lower income backgrounds who make a particular contribution to University life in a range of areas
 - Encourage students from lower income backgrounds to participate in exchange programmes.
- 3.6 Milestones relating to these aims (where appropriate) are shown in Section 11 below.

4. Bursary Scheme for 2010 entry (and continuing students who entered in 2009)

4.1 The University is committed to providing financial assistance to students from lower income backgrounds. Students entering the University in 2010, who are ordinarily resident in the UK and to whom the home rate of tuition fee applies (subsequently referred to as 'home UK students') will be eligible for bursary support according to the criteria below. Criteria and bursary amounts relevant to continuing students who entered in 2009 are also clearly stated below.

4.2 Newcastle University Undergraduate Bursaries

Newcastle University Undergraduate Bursaries are automatically provided to all home UK undergraduate entrants commencing study in 2010, and to all continuing home UK Undergraduate students who entered in 2009, according to the following criteria:

- Those whose household income, as assessed and notified to the University by the Student Loans Company, is £25,000 or less, will automatically receive a Newcastle University Undergraduate Bursary of **£1500** for each relevant year¹ of undergraduate study.
- Those whose household income (as assessed and notified to the University by the Student Loans Company) is between £25,001 and £32,284 will automatically receive a Newcastle University Undergraduate Bursary of **£750** for each relevant year of undergraduate study.

4.3 Newcastle University Achievement Bursaries

In addition to the Undergraduate Bursaries described above, which are provided to **all** home UK undergraduates who meet the relevant household income criteria, and provide the relevant information, the University also offers Achievement Bursaries to students whose financial circumstances and grades on entry meet the relevant criteria:

- All home UK undergraduate students **commencing study in 2010**, who are eligible for an Undergraduate Bursary on financial grounds, **AND** who achieve, on entry, at least **three grade A passes at A level** (or equivalent other qualifications²) will receive an additional Achievement Bursary of £750 per annum for each relevant year of undergraduate study.
- All home UK undergraduate students **commencing study in 2010**, who are eligible for an Undergraduate Bursary on financial grounds, **AND** who achieve, on entry, **two grade A passes at A level** (or equivalent other qualifications) will receive an additional Achievement Bursary of £300 per annum for each relevant year of undergraduate study.
- All home UK undergraduate **continuing students who entered in 2009**, who remain eligible for an Undergraduate Bursary on financial grounds, **AND** who achieved, on entry in 2009, at least **three grade A passes at A level** (or equivalent other qualifications) will receive an additional Achievement Bursary of £500 per annum for each relevant year of undergraduate study.
- All home UK undergraduate **continuing students who entered in 2009**, who remain eligible for an Undergraduate Bursary on financial grounds, **AND** who achieved, on entry in 2009, **two grade A passes at A level** (or equivalent other qualifications) will receive an additional Achievement Bursary of £200 per annum for each relevant year of undergraduate study.

4.4 PARTNERS Achievement Bursaries

Up to two PARTNERS Achievement Bursaries of £1,000, available in the first year of study only, will be awarded in each Academic School to the student(s) considered to have performed best overall on entry through the PARTNERS supported entry route. To be eligible for consideration for a PARTNERS Achievement Bursaries, applicants must:

- Be eligible for a full or partial Newcastle University Undergraduate Bursary on financial grounds
- Make the Newcastle University degree programme their Firm (CF or UF) choice through UCAS
- Attend the PARTNERS Assessed Summer School and complete all of the necessary assignments
- Meet ALL of the conditions of their offer of a place: i.e. achieve the specified grades **AND** successfully pass the Assessed Summer School assessment

A PARTNERS Achievement Bursary may be held in addition to an Achievement Bursary awarded under section 4.3, above.

¹ Details of the Newcastle University Bursary Scheme are published each year in the **Guide to Student Finance** for the relevant year of entry (obtainable from the University). Full details of bursary regulations, including those which apply to students undertaking repeat years or part-time study, are available on the University website.

² Details of grades needed in 'equivalent qualifications', to qualify for an Achievement Bursary, are published on the Newcastle University website.

4.5 PGCE Bursaries

All home UK students following a Postgraduate Certificate of Education (PGCE) programme in 2010-11, and who are eligible for the full means-tested element of the Government Higher Education Maintenance Grant, will receive a Newcastle University PGCE Bursary of £384.

4.6 *ncl+* Bursaries

For students entering from 2009 onwards, the University makes available £40,000 each year for bursaries to recognise individual undergraduate students who make an exceptional contribution to the life of the University through sport, music, enterprise, community activity or other relevant contributions. These bursaries (which may be £500 or £1000) are available only to students who have received an Undergraduate or PGCE Bursary on financial grounds. They may be awarded in any year of study, and are normally awarded for one year only. To receive a *ncl+* Bursary, students must be personally recommended by a relevant member of University staff. *ncl+* Bursaries may be held in addition to any Bursaries awarded under the terms of sections 4.3, 4.4, 4.5 or 4.7 of this Access Agreement.

4.7 Exchange Bursaries

For students entering from 2009 onwards, the University sets aside £20,000 per year to provide additional bursary support of up to £800 to students participating in ERASMUS or non-EU exchange programmes. These bursaries are available only to students who receive an Undergraduate Bursary on financial grounds. Exchange Bursaries may be held in addition to any other Bursaries awarded under the terms of sections 4.3, 4.4, 4.5 or 4.6 of this Access Agreement.

4.8 Eligible students who are undertaking a compulsory placement / study abroad as part of their degree programme, and by whom a reduced rate tuition fee would normally be payable to the University, will receive a bursary reflecting the reduced rate of fee, on a *pro rata* basis.

4.9 All bursaries will be paid as a cash award.

4.10 The amount of the annual bursary in each category described above will be reviewed by the University each year.

4.11 For students from England³ commencing undergraduate degree programmes in 2010, the table below shows examples of the amount of non-repayable support for which students may be eligible in 2010-11. In addition, students will be able to take out repayable student loans for living costs and fee deferral.

Annual household income	Government financial support per year	Newcastle University Undergraduate Bursary per year	Newcastle University Achievement Bursary	Total amount of non-repayable financial support per year
£25,000 or less	Full maintenance grant of £2,906	£1,500	£750 for grades AAA £300 for grades AA (or equivalent)	Minimum: £4,186 Maximum: £4,686 depending on grades on entry.
Between £25,001 and £32,284	Partial maintenance grant between £1450(approx) and £2,906	£750	£750 for grades AAA £300 for grades AA (or equivalent)	Minimum: £2,090 Maximum: £4,046 depending on grades on entry and household income
Between £32,285 and £50,020	Partial maintenance grant between £50 and £1450 (approx)	£0	£0	Minimum: £50 Maximum: £1,450 depending on household income

4.12 For continuing students from England who commenced undergraduate degree programmes in 2009, the table below shows examples of the amount of non-repayable support for which students may be eligible in 2010-11. In addition, students will be able to take out repayable student loans for living costs and fee deferral.

Annual household income	Government financial support per year	Newcastle University Undergraduate Bursary per year	Newcastle University Achievement Bursary (based on grades achieved on entry in 2009)	Total amount of non-repayable financial support per year
£25,000 or less	Full maintenance grant of £2,906	£1,500	£500 for grades AAA £200 for grades AA (or equivalent)	Minimum: £4,186 Maximum: £4,686 depending on grades on entry.

³ Details of government student support arrangements for students from other parts of the UK are available from the relevant government websites for Scotland, Wales and Northern Ireland.

Between £25,001 and £32,284	Partial maintenance grant between £1450 (approx) and £2,906	£750	£500 for grades AAA £200 for grades AA (or equivalent)	Minimum: £2,090 Maximum: £4,046 depending on grades on entry and household income
Between £32,285 and £50,020	Partial maintenance grant between £50 and £1450 (approx)	£0	£0	Minimum: £50 Maximum: £1,450 depending on household income

5. Bursary schemes for continuing students who entered Newcastle University in 2007 or 2008

- 5.1 Home UK Undergraduate students who commenced study in 2007 or 2008 will be eligible for a Newcastle University Bursary according to the Bursary Scheme described in the Access Agreement relevant to their year of entry.
- 5.2 Revised Bursary amounts and income thresholds in 2010-11 for continuing students who entered in 2007 or 2008 are summarised here:

Students who entered in 2007 and 2008	
Annual household income	Newcastle University Bursary in payable 2010-11
£18,360 or less	£1500
Between £18,361 and £26,222	£1125
Between £26,223 and £32,284	£750

- 5.3 Full details of these bursary schemes, and of scholarships and prizes available, are included in the relevant Access Agreement.

6. Bursary assessment and payment

- 6.1 Students' eligibility for government financial support will be assessed on the basis of financial information provided to Student Finance England (or equivalent bodies in Scotland, Wales and Northern Ireland).
- 6.2 Students do not have to apply separately for consideration for a Newcastle University Bursary. To be considered for a Bursary, students and their sponsors must indicate to Student Finance England (or equivalent body) that they give permission for their financial information to be used for bursary assessment purposes.
- 6.3 Newcastle University Bursaries will be paid to students by Student Finance Direct
- 6.4 The Bursary will normally be paid in a single payment in February each year. Details of procedures for payment of the bursary will be provided to all students holding an offer of a place.
- 6.5 From the information which we have about our current students, we estimate that the numbers of 2010-entry students eligible for bursaries in 2010-11 will be:

Newcastle University Undergraduate Bursaries of £1500	771	20% of total UK 2010 entrants
Newcastle University Undergraduate Bursaries of £750	193	5% of total UK 2010 entrants
Additional Achievement Bursaries of £750 or £300, based on grades on entry	406	42% of eligible Undergraduate Bursary recipients (and 10.5% of all UK entrants)
PARTNERS Achievement Bursaries	54	Approx 27% of all entrants through PARTNERS supported entry route
PGCE Bursaries of £384	85	34% of PGCE entrants approx

- 6.6 The majority of funding for Bursaries derives from additional student fee income paid by all Undergraduate/PGCE students. As in previous years, alumni funding (estimated to be approximately £250,000 per annum) contributes to the overall resources for the Newcastle University Bursary scheme, subject to continued availability of donations for this purpose.
- 6.7 The Newcastle University Bursary scheme is reviewed annually and may be revised to reflect changing circumstances and requirements and / or government support arrangements.

7 Recognising outstanding achievement

- 7.1 In addition to the Newcastle University Bursary scheme described above, the University offers a **Newcastle Excellence Scholarship Scheme** to support its aim to admit undergraduate students of excellent ability and potential and to recognise outstanding achievement on entry.

- 7.2 Excellence Scholarships of up to £1,500 (normally in the first year of study only) for students from the UK and EU are available in all science, agriculture and engineering disciplines and in some humanities, arts and social science programmes. Specific criteria for each award differ according to subject, but are mainly based on attainment on entry. Full details are available in our *Guide to Student Finance* and on the University website.
- 7.3 Excellence Scholarships of up to £1,000 are available to support intercalated study in medicine and dentistry and the fourth year of the integrated Master's (MSci) in Biomedical Sciences.
- 7.4 It is expected that students from the target groups in this Access Agreement will benefit from these Excellence Scholarships on a proportionate basis each year.
- 7.5 For students entering the University in 2010, it is anticipated that approximately 200 awards will be made to new first year students. The University's overall investment in Excellence Scholarships and awards for the 2010 entry cohort amounts to approximately £190,000, of which approximately £50,000 is expected to be awarded to students from the target cohorts identified in this Access Agreement
- 7.6 Information about the Newcastle Excellence Scholarships Scheme and a range of other scholarships and prizes and awards in individual subject areas is provided on the University website and in printed publicity materials.

8. Provision of information to students

- 8.1 A key to the success of our initiatives to promote and safeguard fair access is the provision of clear, timely and accurate information about student finance to potential students, parents, teachers and advisers.
- 8.2 Our Undergraduate Prospectus contains general information about student finance and an outline of our Bursary Scheme.
- 8.3 Our comprehensive ***Guide to Student Finance*** includes information about fees, government financial support, the Newcastle University Bursary Scheme, Achievement Bursaries, the Newcastle Excellence Scholarships Scheme, Access to Learning Funds, student loans and other ways of funding study. It also provides advice on budgeting and financial management. A copy of the Guide is sent with the Undergraduate Prospectus to all enquirers and to all UK schools and colleges. Copies are available at all HE recruitment fairs, parents' evenings, school visits, University Visit Days, post-application open days and other relevant events. The Guide is revised twice each year (more frequently if necessary) to reflect any changes in our Bursary scheme and in government student support arrangements.
- 8.4 Our University website includes up-to-date financial information, including a PDF version of the *Guide to Student Finance*.
- 8.5 All applicants who receive an offer of a place receive relevant further information which explains the full range of bursaries, scholarships and other awards which are available in their subject area.
- 8.6 The website is being further developed to include resources for those who advise students, including a PowerPoint presentation with notes, which can be downloaded for use by teachers and careers advisers, handouts and budget planner activities for potential students.
- 8.7 Our student recruitment and widening participation teams visit schools and colleges to give presentations to teachers and pupils about student finance matters. In addition, our trained Graduate Ambassadors visit schools and colleges to explain student finance issues and our bursary scheme, and give first-hand, credible information about the experience of being a student at Newcastle University.
- 8.8 The University also contributes to Student Finance seminars provided by the region's Aimhigher Area Partnerships, which also convey the key messages through relevant websites. The University works to reinforce messages about student financial support alongside the government's national publicity scheme.
- 8.9 Existing eligible students (from 2006 entry onwards) are reminded about the bursary scheme and financial support available during each year of study at the University. This ranges from information provided at the pre-arrival and registration phase, to email, web and face-to-face publicity campaigns throughout the year.

9. Current outreach activities

- 9.1 Newcastle University has a coherent and wide-ranging programme of widening participation work, which is reviewed and revised annually. The outreach elements of our Widening Participation Strategy are based on the following key themes:
- Working with young people (from primary school age) to raise their aspirations and awareness of higher education, using our current students as positive role models through our Students into Schools Project, Student Representative Scheme, 'Student Guide to Student Life' and residential Summer Schools

- Encouraging positive aspirations and attitudes in families and communities through work with parents, younger children, looked after children and disaffected groups
- Activities and initiatives to help to raise the attainment of young people, including Master Classes, taster events and Summer Schools
- Building strong relationships with schools and colleges, and working closely with teachers, advisers, Connexions staff and others who influence student choice and aspirations
- Providing opportunities for all potential applicants to find out about the University, together with information which will help them to make an informed choice about their options, through a wide-ranging programme of liaison activities, school / college visits, comprehensive printed and web-based information and opportunities to visit the campus
- Identifying, through our PARTNERS Programme, able, talented young people of high potential, who may be at risk of not progressing to HE because of socio-economic, personal or educational disadvantage factors, and supporting them in the transition from school or college to the University
- Collaborating with the other universities and colleges in the region, through regional projects and initiatives such as the government's Aimhigher programme and Lifelong Learning Networks, to encourage progression to higher education
- Developing our curriculum and our student support services to reflect the needs of an increasingly diverse student population.

9.2 Full details of Newcastle University's Widening Participation and outreach activities are provided in the Widening Participation Strategic Assessment submitted to HEFCE in June 2009.

10. New outreach work (from 2006)

Since 2006-07, Newcastle University has used a proportion of its additional fee income each year to support the following additional outreach activities:

10.1 Graduate Ambassador Scheme – Targeted Outreach Project

- Four of the University's new graduates are employed each year, on a one-year full-time contract, to work as Graduate Ambassadors in collaboration with our student recruitment and widening participation teams. The Graduate Ambassadors help to extend the geographical 'reach' of our Widening Participation activities through visits to schools and colleges to deliver presentations and interactive workshops for pupils. Topics include: the benefits of investing in their future through participation in Higher Education; student finance issues, including the bursary scheme; student life (to dispel myths and misconceptions); and the 'Newcastle experience' about which, as very recent undergraduate students, they will be able to give credible and contemporary information. 2010-11 will be the sixth successive year of the Graduate Ambassador Scheme.
- The Graduate Ambassadors are fully trained, and undertake many other relevant roles, including work with local schools and colleges, involvement in the PARTNERS Programme and Summer Schools, contributing to relevant University recruitment publicity materials, and the development of projects, resources and materials to support our widening participation work. They also contribute to post-application events, offering accommodation tours and talks on student finance to applicants and their parents. In doing so, they gain valuable employability skills preparing them for their own future careers.
- Since October 2005, the University's widening participation and student recruitment teams have also worked closely with our School of Education and Communication Studies to ensure that each year's cohort of **PGCE students** is fully trained and equipped to promote the benefits of Higher Education, and the range of subjects available, during their periods of teaching practice.
- The Graduate Ambassadors Targeted Outreach Project is supplemented by a new (University core-funded) **Student Ambassador** scheme. Approximately 130 current undergraduate students are employed on a part-time contract each year. They support the wide range of widening participation and student recruitment events on campus and also attend schools and colleges to talk about higher education choices, student finance and the student experience. Some of the Ambassadors have a particular focus on support for STEM-based outreach. They also provide support for our Summer School and Master Class activities.

10.2 Strengthening our Widening Participation Team by providing additional resources to Faculties and Schools

- Faculties and Schools play a vital role in widening participation and outreach activities, delivering the essential academic content of many events and participating in our PARTNERS Programme and Students into Schools schemes. Involvement in such work is often on the basis of goodwill and is subject to time constraints and other pressures.

- The University provides additional funding to Faculties and Schools so that the enthusiastic champions of our widening participation and outreach work can be supported in their contribution to activities such as: Master Classes; Summer Schools and other residential events; development of exciting materials to enthuse young people about learning; visits to schools and colleges; pre-application open days, taster events and conferences for students; subject-specific development activities for teachers; and work to encourage, retain and 'nurture' applicants from target groups to maximise their opportunities for progression. Part of this funding derives from additional student fee income (and is thus included in this Access Agreement), whilst the rest is University core funding.

10.3 Extension of the PARTNERS Programme into schools and colleges with a large black and minority ethnic population

- As part of our drive to extend our widening participation activities and impact beyond the immediate region, we continue to extend our flagship PARTNERS Programme to schools and colleges in key areas (eg Kirklees Local Authority) which have a high black and minority ethnic population, in order to encourage more qualified young people from these groups to apply to the University. It is estimated that approximately 2,400 additional students per annum will have the opportunity to participate in PARTNERS events, and that up to 100 per annum will potentially benefit from the supported entry route.

10.4 Work to raise awareness of deaf and disabled students

- The University continues to offer awareness-raising events and / or publicity for deaf and disabled students (working with Northumbria University). We ensure that all of our aspiration-raising, outreach and progression activities are inclusive, accessible and open to students with a disability. We also offer in-school presentations on the additional resources and support available and specifically encourage deaf and disabled students to consider the PARTNERS Programme supported entry route.

10.5 Looked After Children

- The support and progression of Looked After Children is a key widening participation priority. Children from care backgrounds are encouraged to identify any particular support needs prior to entry and are also automatically eligible for support through our PARTNERS Programme. They automatically qualify for financial support. Newcastle University is accredited by the Frank Buttle Trust on the basis of its support for Looked After Children.

10.6 Helena Kennedy Foundation

- On occasion, the University funds 'one-off' bursaries for eligible students recommended by the Helen Kennedy Foundation.

10.7 Building on our extensive engagement with schools and colleges

- The University continues to build upon and enhance its formal partnerships with a wide range of schools and colleges as part of its ongoing engagement agenda, and in support of the government's encouragement for all secondary schools to have a partnership with a university.

10.8 Realising Opportunities (new pilot project from 2009)

- Newcastle University is the lead University for the *Realising Opportunities Programme*, in collaboration with the Department for Business Innovation and Skills (formerly DIUS), which involves a core group of 13 research-intensive HEIs. The project has received HEFCE funding for the pilot phase (2009-10 and 2010-11) and seeks to address the particular challenge of encouraging students of high ability, but from WP backgrounds (i.e. the 'most able, least likely'), to progress to selective, research-intensive universities best suited to their abilities and potential. This is a high-profile fair access project, which will be nationally-available once fully developed (from 2012 entry), and has the potential to encourage and facilitate greater geographical mobility and access to the professions for students from under-represented groups. Subject to successful pilot developments and the availability of longer-term resources, it is anticipated that this project may be included in Newcastle University's WP Strategy and Access Agreement commitments in due course, and that specific milestones and targets may be included in the Access Agreement from 2012 entry.

11. Milestones for 2010-11

11.1 The University uses three sets of data as its baseline for milestones, monitoring and evaluation in the context of this Agreement:

- UCAS application and intake datasets purchased annually by the University
- HESA Performance Indicators concerning student intake (supplemented, where more detailed analysis is required, by the University's own data)

- Data provided by the Student Loans Company regarding eligibility of students for financial support (supplemented where appropriate by the University's own data relating to payments to students outside the Student Loans Company system).
- 11.2 The parameters for considering these data sets have been maintained in successive years to enable meaningful comparisons to be made.
- 11.3 The milestones and targets shown below have been reviewed and revised to ensure consistency with the Widening Participation Strategic Assessment, submitted to HEFCE in June 2009, and will be further revised as appropriate, on an annual basis, in accordance with the relevant monitoring and evaluation processes. Some of the milestones are specific to the Access Agreement, whereas others are common to both documents and are shown in bold type.
- 11.4 For completeness, additional milestones and targets that are included in the Widening Participation Strategic Assessment, but which are not part of the Access Agreement, are indicated in the shaded text-box at the end of section 11.

11.5 **Impact Milestones**

a) Young students from lower socio-economic groups (NS-SEC groups 4 - 7)

- **At least 30% of young North East entrants to be from NS-SEC 4-7 groups (from 2010)**
- **At least 21% of young UK entrants to be from NS-SEC 4-7 by 2014**

b) Young students from low participation neighbourhoods

(NB: The HESA benchmarks and calculation methodology for this indicator changed from 2007).

- **Young UK entrants from low participation neighbourhoods to meet or exceed benchmarks each year**
- **At least 22% of young North East entrants to be from low participation neighbourhoods (calculated using the original methodology)**
- Percentage of young North East entrants from low participation neighbourhoods to be at least double the University's benchmark for the overall intake (using the revised methodology).

c) Students with a disability

- Proportion of applications by students indicating a disability (including those with dyslexia) to remain stable at approximately 4%
- HESA performance indicator for intake of students in receipt of the Disabled Students' Allowance to meet the HESA benchmark

d) Students from black and minority ethnic groups

- Proportion of applications to increase from 6.4% in 2003 to 6.85% in 2010
- Percentage intake to increase from approximately 4.7% in 2003 to approximately 6.00% in 2010
- Percentage of students entering Newcastle University from the North East from black and minority ethnic backgrounds to increase from 5.98% in 2003 to 8% by 2010

e) Students eligible for bursaries

- Proportion of new undergraduate entrants eligible for Newcastle University Undergraduate Bursaries to be approximately 25% in 2010-11
- Number of PGCE students eligible for bursaries to be approximately 85 in 2010-11
- **At least 90% of revised bursary commitments to be fulfilled**

11.6 **Outreach and activity milestones**

- **Maintain productive partnership with 108 PARTNERS schools and colleges, increasing by no more than 2 per annum until 2014**
- **Participate fully in Aimhigher TWN, Summer School and Associates activities and meet relevant targets**
- 4 Graduate Ambassadors to be employed each year from 2006
- **Graduate Ambassadors to visit at least 140 schools and colleges in target areas each year**
- **At least 95% of revised outreach commitments to be fulfilled**

- **Successful leadership, development and implementation of the DBIS WP scheme (Realising Opportunities) for 13 research-intensive universities, with full delivery for 2012 entry**
- Up to 40 students from black or minority ethnic groups to apply to the University through the PARTNERS Programme in 2010.
- At least 70 deaf and disabled students and advisers to attend awareness-raising events organised jointly by Newcastle University and Northumbria University in 2010-11.
- Maintain Frank Buttle Trust accreditation for our work to support Looked After Children.

Additional Key Performance Indicators included in the Widening Participation Strategic Assessment, but not part of the Access Agreement, are shown below

Additional Impact KPIs:

- Intake from North East to be at least 23% of annual UK undergraduate intake
- At least 72% of young UK entrants to be from state schools and colleges by 2014
- At least 90% of young North East entrants to be from state schools and colleges (from 2010)
- HESA performance indicators for young entrants from target geographical areas consistently to exceed overall performance indicators

Additional Activity / Outreach KPIs:

- Progress towards full centralisation of admissions decision-making
- CRM campaigns system in place for September 2009 and full undergraduate campaigns activity by September 2010
- Informative WP website developed for internal and external audiences and annual Widening Participation Review document produced for circulation
- Teachers' Toolkit concept further developed by December 2009
- University to join at least one national policy group or debate on WP topics per annum and contribute sessions to at least two national conferences per annum
- WP influence is included in the University's Strategic Positioning project and associated developments
- Number of widening participation-related research topics undertaken by academic staff

Further information on the context of these KPIs is included in the University's Widening Participation Strategic Assessment.

12 Monitoring, evaluation and review

- 12.1 The University's performance against the above applications milestones will be monitored annually in February/March (on receipt of the relevant UCAS datasets).
- 12.2 Monitoring of performance against HESA benchmarks will be undertaken on publication of the annual Performance Indicators (normally September).
- 12.3 The University will report to HEFCE on relevant widening participation activity through the annual Monitoring Process relating to the Widening Participation Strategic Assessment.
- 12.4 The University will report to OFFA each year as required by the annual monitoring processes (in parallel with reporting against the Widening Participation Strategic Assessment).
- 12.5 Within the University, the effectiveness of the activities and bursary schemes included in the Access Agreement will be reviewed and evaluated annually by University Teaching and Learning Committee. Recommendations for any revisions to the Access Agreement will be discussed initially with OFFA before being considered and agreed by the Student Finance Committee (or its Chair) and by Executive Board (if appropriate), and then submitted to OFFA for approval.

Annexes:

1. Summary of current WP Strategy at Newcastle University (from Widening Participation Strategic Assessment)
2. Original baseline application and performance data against which calculations and progress are measured
3. Russell Group Statement on widening participation (issued 2004)

Annex 1: Newcastle University: Widening Participation Strategy

Widening Participation Strategy and Priorities

As a civic university which engages fully with our community, the city and the region, our Widening Participation Strategy includes extensive work with schools and colleges in target areas to promote progression, participation and flexible access. We also seek to attract and retain talented students from all parts of the UK. The University's Widening Participation Strategy is based on the following key elements of the student life-cycle:

- Raising the aspirations and awareness of young people and their parents and teachers, adults and other potential learners, to encourage participation in higher education
- Working with schools and colleges to raise attainment
- Working within communities to engage people of all ages in lifelong learning
- Provision of information, advice and guidance to support potential applicants in making informed choices
- Pre-entry activities and encouraging applications
- Facilitating admissions and conversion of applications to registrations
- Supporting student retention and success
- Developing employability skills for undergraduate students and adult lifelong learners
- Developing our curriculum to meet the needs of a diverse student body

In all of its work to widen and increase participation, the University works both as an individual institution, and as part of a number of regional and national initiatives, including: Aimhigher; Lifelong Learning Networks; Young Gifted and Talented Learner Academy; the Russell Group Association for Widening Participation; HELOA (Higher Education Liaison Officers' Association) and the Specialist Schools and Academies Trust etc.

The University's **Widening Participation Strategic Assessment**, submitted to HEFCE in June 2009, contains full details of activities and priorities. The key elements are outlined here:

a) Vision

Fair and flexible access for talent and ability leading to student success and outstanding employability

b) Mission:

To make a positive and pro-active contribution to the North East's efforts to raise aspirations and increase and widen participation in HE; to provide fair and flexible access to Newcastle University for able students from under-represented groups; and to attract and retain national talent and ability.

c) Values:

- Diversity and equality of opportunity
- Fair Access for all, regardless of circumstances
- Integrity in marketing and admissions
- Expert staff, high-quality activities, professional information and advice and responsiveness to feedback.

d) Strategic Aims

- Make a positive and pro-active contribution to the North East's efforts to raise aspirations and increase and widen participation in Higher Education.
- Provide fair and flexible access to Newcastle University for under-represented groups.
- Attract and retain talented and able students from all parts of the UK, regardless of circumstance
- Provide appropriate financial support for students from lower-income backgrounds
- Consistently exceed national WP benchmarks in respect of students entering Newcastle University from the North East whilst maintaining continued overall progress, albeit slowly, towards the HESA benchmarks
- Achieve approval of the University's Widening Participation Strategy (by HEFCE and OFFA)
- Achieve regional and national recognition for the University's contribution to WP activity and policy

e) **Five-Point Plan and associated Actions:**

1. Maintain our extensive WP efforts in target geographical areas

- Participate fully in regional and national WP programmes such as Aimhigher, Students into Schools and networks, partnerships and projects
- Maintain (and gradually extend) our PARTNERS Programme activities & supported entry route with 108 schools and colleges

2. Provide fair and flexible access based on ability, potential and context, supported by a more centralised approach to admissions

- Maximise flexible admission of able students from the North East and other target areas
- Continue to identify, at the point of application, contextual factors for all applicants
- Move towards fully centralised electronic undergraduate decision-making to optimise fair access and consistent consideration of contextual factors

3. Extend our widening participation 'reach' and enhance our ability to attract and admit the most talented students from all parts of the UK, by implementing an effective CRM strategy

- Continue (and consider extending) our Graduate Ambassador activities in the North of the UK
- Develop and implement an effective CRM campaigns strategy to maximise conversion of high-ability applicants

4. Review and further revise our bursary scheme in order to meet our Access Agreement commitments and attract students from target groups

- Further revise the Access Agreement for 2010 entry, including estimated bursary numbers and impact milestones
- Offer larger bursaries to a smaller proportion of students and enhanced bursaries for students from target areas.
- Pro-actively promote the Bursary scheme to maximise take-up

5. Package and promote widening participation activities, expertise and impact more widely in order to raise our profile among key stakeholders, by engaging in national debate, taking a lead in national programmes and seeking to influence government policy in consultation with HEFCE, OFFA and HESA

- Produce and disseminate print and online publicity and promotional materials to showcase the University's WP activities
 - Further develop the 'Teachers' Toolkit' concept
 - Contribute actively to conferences, networks, debates and policy development
 - Lead the development and implementation of the DIUS WP scheme (Realising Opportunities) involving 13 research-intensive universities
 - Seek recognition through awards, external accreditation and media profile
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Annex 2: Relevant baseline and performance data for Newcastle University, 1999-2003

1. Performance indicators for students from the North East

One indicator of the success of the University's widening participation activities (which necessarily have a regional focus) is the fact that, for students who from the North East, the University consistently exceeds HEFCE / HESA key widening participation benchmarks, with 85.44% from state schools and colleges; 39% from HEFCE social groups 3 and 4, and 21.6% from low participation neighbourhoods (2003 figures). Overall, approximately 23.5% of young entrants were from the North East in 2003. Most of the University's widening participation challenges thus arise from its application and intake patterns outside the North East region.

2. Application data:

The table below shows application data (all UK applicants: numbers and percentages) for the key target groups included in the Access Agreement, together with overall growth during the period.

Number of applications in each group, showing percentage of total applicants for whom data is known.											
	1999		2000		2001		2002		2003		% growth in actual numbers since 1999
	number	%	number	%	number	%	number	%	number	%	
disabled (all, including dyslexic)	606	3.29%	531	3.10%	754	4.16%	904	4.36%	951	4.22%	56.93%
Black & minority ethnic (all)	1083	6.1%	998	6.04%	1087	6.18%	1344	6.63%	1414	6.4%	30.56%
socio-economic groups III, IV and V / NS-SEC 4-7 (young)	2908	17.67%	2780	18.24%	3002	18.60%	3779	21.04%	4484	21.59%	54.20%
low participation neighbourhoods (young)	1727	10.55%	1804	11.58%	1914	11.50%	2084	10.98%	2543	11.49%	47.25%

3. HEFCE / HESA Performance indicators for relevant groups

This table shows the relevant HEFCE / HESA performance indicators, sector benchmarks and location-adjusted benchmarks for the period 1999-2002 (latest available). The column relating to black / ethnic minority students derives not from HESA Performance Indicators, but from the University's own HESA data.

		Students in receipt of DSA	Young entrants from NS-SEC 4-7	Young entrants from low participation neighbourhoods	Black and minority ethnic students (from University's own data)
1999 entry	University		16%	10%	Incomplete data
	Sector benchmark		20%	10%	N/a
	Location-adjusted bmk		21%	12%	N/a
2000 entry	University	2.2%	17%	11%	6.63%
	Sector benchmark	1.1%	21%	10%	N/a
	Location-adjusted bmk	N/A	22%	13%	N/a
2001 entry	University	2.7%	17%	11%	6.14%
	Sector benchmark	1.6%	22%	11%	N/a
	Location-adjusted bmk	N/A	23%	13%	N/a
2002 entry	University	3.5%	20%	10%	5.48%
	Sector benchmark	2.0%	24%	11%	N/a
	Location-adjusted bmk	N/A	25%	13%	N/a
2003 entry	University	3.3%	21%	9.7%	4.71%
	Sector benchmark	2.4%	24%	11%	N/a
	Location-adjusted bmk	N/A	25%	13.6%	N/a

Annex 3: Widening participation in Russell Group universities: meeting our social responsibilities

The Russell Group universities believe that it is part of our social responsibility to increase and widen participation in HE and that able students from any background should be able to attend universities with the most demanding entry requirements. The Group also acknowledges the educational benefits that flow from a diverse student body.

The educational opportunities offered by Russell Group universities are distinctive, especially in relation to subjects such as Medicine, and the Group is concerned to ensure that a wide range of students can benefit from these opportunities.

Measures to address this include the development of specialist progression pathways to highly competitive and demanding subjects such as Medicine. Experience and good practice from these pilot projects is disseminated throughout the Russell Group in order to support the development of similar projects.

Given the generally high entry requirements within Russell Group universities, measures to raise attainment and support high achievers are an important part of members' widening participation programs. The Russell Group believes that the outcomes of the National Academy for Gifted and Talented Youth's 'Higher Education Gateway' project could be of real interest to member institutions. The Group is committed to attracting and admitting those most able to benefit from the type of courses we offer and looks forward to contributing to the project as appropriate.

The Russell Group universities are committed to supporting students in financial need through bursaries or other appropriate forms of financial assistance. In 2003-2004 member universities were pleased to provide bursaries from their own funds amounting to well over £3m; provision from 2006 will represent a significant proportion of additional fees income.

Much of member universities' work with schools and colleges helps raise aspirations, awareness and attainment among potential students on behalf of the whole higher education sector. University visits, summer schools, taster sessions and a variety of other learning experiences make significant and substantial contributions to the broader widening participation agenda.

The brochure 'Widening Participation in Russell Group Universities' summarises selected activities and initiatives. This publication was commissioned in 2003 by the then chairman of the Russell Group, Professor Michael Sterling, Vice-Chancellor of the University of Birmingham.

The Russell Group Association for Widening Participation was founded in June 2000 and all Russell Group universities are actively involved. The Association's members are united in their primary aim of widening participation in research-led universities. Regular meetings promote the sharing of good practice and the development of joint initiatives. The Group is supported by the Russell Group Secretariat.

October 2004

Statement provided by the Russell Group Association for Widening Participation