Widening Participation and Fair Access at the University of Liverpool

Realistic evaluation for an HE setting
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Dr Mark O’Brien


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Special appreciation goes to Dr Paul Redmond who provided valuable professional support throughout.

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The evaluation model supporting the findings of this report is intended as an approach that can embed evaluation as a developmental method for WP and Fair Access work at the University in the longer term.

It is also models a feasible approach to evaluation for a complex organisational setting requiring professional stakeholder engagement.

It is organised with the following design features:

- practitioner involvement;
- data searches that allow analysis at all organisational levels down to individual subject areas;
- the alignment of data effects to guide evaluation scrutiny at all levels;
- the further alignment of clusters of data effects with relevant professional work at all levels;
- the use of professional opinion and judgement of how activity and data effects are linked, to guide further inquiry and so move towards programme improvement and organisational change;
- the use of attribution at different levels of confidence, differentiated by the types of evidence available;
- the use of pilot-study survey where evidence justifies further inquiry;
- scalability for specific work processes, activities and programmes.

The University of Liverpool home student profile shows incremental annual change on many Access Agreement measures towards being more diverse at all organisational levels and across many schools and departments.

Relating positive data-effects to professional work within academic faculties, schools and departments suggests a notional ‘Inclusive Department’, where there is evidence of innovation and professional effort in the following areas:

- inclusive pedagogy;
the introduction of student support officers with a full or partial WP and Fair Access remit;

attention paid to subject-linked employability;

collaboration with relevant external agencies;

internal collaboration between academic staff and relevant professional services teams;

close engagement with the Educational Opportunities team for outreach work;

the involvement of undergraduate students in schools outreach work;

WP and Fair Access sensitivities built into the design of interviews and other selection methodologies;

the use of ‘non-traditional’ qualifications for offer decisions;

the availability of Further Education Access routes that link directly to University undergraduate programmes;

the establishment of ‘enhanced curriculums’ that enable students to contribute to the ‘life-of-the-department’;

interactive design for post-application visit days and discovery days.

Relating professional opinion and judgement from the Educational Opportunities team to data from surveys of school professionals and one student group (Scholars) evidences the importance of carefully managed relationships for successful WP and Fair Access work.

Specifically, the ‘Relationships Model’ is important for:

the high regard in which Partner and Associate schools hold the work of the Educational Opportunities team;

a comprehensive approach to outreach work that engages with schools at all organisational levels;

outreach work by the University becoming a part of the ‘life-of-the-school’;

mobilising the resources of the University in its wider aspects and at multiple levels;
• acknowledging that visits by university staff to primary schools are remembered by many students, making ‘reinforcement’ possible in later school years;

• foregrounding high quality academic content and engagement with academics specifically for Fair Access work at Years 12 and 13.
## Glossary

<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Definition</th>
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<tbody>
<tr>
<td>AI</td>
<td>Appreciative Inquiry</td>
</tr>
<tr>
<td>ALF</td>
<td>Access to Learning Fund</td>
</tr>
<tr>
<td>BIS</td>
<td>Department for Business, Innovation and Skills</td>
</tr>
<tr>
<td>BME</td>
<td>Black and minority ethnic</td>
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<td>BTEC</td>
<td>Business and Technology Education Council</td>
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<tr>
<td>CD</td>
<td>Contextual data</td>
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<tr>
<td>CERN</td>
<td>European Organisation for Nuclear Research</td>
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<tr>
<td>DfE</td>
<td>Department for Education</td>
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<tr>
<td>DSA</td>
<td>Disabled Student Allowance</td>
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<tr>
<td>DST</td>
<td>Disability Support Team</td>
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<tr>
<td>FSM</td>
<td>Free school meals</td>
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<tr>
<td>GA</td>
<td>Graduate advocate</td>
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<tr>
<td>HEA</td>
<td>Higher Education Academy</td>
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<tr>
<td>HEAT</td>
<td>Higher Education Access Tracker</td>
</tr>
<tr>
<td>HEFCE</td>
<td>Higher Education Funding Council England</td>
</tr>
<tr>
<td>HEI</td>
<td>Higher education institution</td>
</tr>
<tr>
<td>HLS</td>
<td>Faculty of Health and Life Sciences</td>
</tr>
<tr>
<td>HSS</td>
<td>Faculty of Humanities and Social Sciences</td>
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<tr>
<td>IMD</td>
<td>Index of Multiple Deprivation</td>
</tr>
<tr>
<td>LPN</td>
<td>Low participation neighbourhood</td>
</tr>
<tr>
<td>MMI</td>
<td>Multiple mini-interview</td>
</tr>
<tr>
<td>MOOC</td>
<td>Massive open online course</td>
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<tr>
<td>NS-SeC</td>
<td>National statistics socio-economic classification</td>
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<tr>
<td>NTQ</td>
<td>Non-traditional qualification</td>
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<tr>
<td>OFFA</td>
<td>Office for Fair Access</td>
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<tr>
<td>PAV</td>
<td>Post-application visit day</td>
</tr>
<tr>
<td>PUA</td>
<td>Primary urban area</td>
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<tr>
<td>SE</td>
<td>Faculty of Science and Engineering</td>
</tr>
<tr>
<td>SIFE</td>
<td>Students in Free Enterprise</td>
</tr>
<tr>
<td>SLATSO</td>
<td>Student learning and teaching officer</td>
</tr>
<tr>
<td>SRAO</td>
<td>Student Recruitment and Admissions Office</td>
</tr>
<tr>
<td>STEM</td>
<td>Science, technology, engineering and mathematics</td>
</tr>
<tr>
<td>UCAS</td>
<td>Universities and Colleges Admissions Service</td>
</tr>
<tr>
<td>UG</td>
<td>Undergraduate</td>
</tr>
<tr>
<td>UVAC</td>
<td>University Vocational Awards Council</td>
</tr>
<tr>
<td>WP</td>
<td>Widening participation</td>
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1. Introduction

1.1 The report

The Office for Fair Access (OFFA) has made clear its expectation that universities across the UK HE sector evaluate their efforts towards widening participation (WP) within their institutions.

*It is essential to understand which approaches and activities have the greatest impact, and why. An improved evidence base, and a robust approach to evaluation, are critical in helping the sector and partners to understand which of their activities are most effective and have the greatest impact on access, student success and progression, so enabling effort to be focused on these areas. (OFFA 2014)*

This report responds to that expectation, and in-so-doing aims to illuminate the extensive efforts that are underway at the University of Liverpool to: raise awareness amongst children and adults in otherwise disadvantaged groups of the life-possibilities that HE offers; and to improve the recruitment, retention and success of students from disadvantaged backgrounds. It will convey the ways in which the University is already changing in this respect. It will also consider what can be learnt from the University’s experience over recent years and will make recommendations for improvements to WP and Fair Access policy and practice for the University and for the wider HE sector. Crucially, it will offer a model of how evaluation in this area can work in the longer term for the University.

More specifically, the report is organised in the following way. The challenge posed by the requirement to evaluate WP and Fair Access and the complexities involved are discussed in Section 2. The ways in which this report links with the University’s Access Agreement are explained in Section 3. The design of the evaluation and its underlying values are given in some detail in Section 4. Section 5.1 presents quantitative data charting the changes in the student profile of the University over a number of years, applicants’ perceptions from the 2014 Applicant Survey and alignments between these quantitative data and professional activity at different organisational levels. Section 5.2 presents two qualitative pilot studies. In Section 6 the findings are discussed in relation to some key themes relevant to the national agenda and overarching evaluation outcomes are identified. Section 7 gives a conclusion. Section 8 provides recommendations for University policy, professional practice and future evaluation.
1.2 The Liverpool context

Historically, the University of Liverpool has scored comparatively highly on WP indicators. The student proportions figures for 2014 have been typical of previous recent years.¹

<table>
<thead>
<tr>
<th>Low Participation Neighbourhoods (LPN)</th>
<th>Socio-economic Class 4-7</th>
<th>State Schools and Colleges</th>
</tr>
</thead>
<tbody>
<tr>
<td>University of Liverpool</td>
<td>8.7%</td>
<td>23.5%</td>
</tr>
<tr>
<td>English Russell Group</td>
<td>5.8%</td>
<td>18.8%</td>
</tr>
<tr>
<td>England (all HEIs)</td>
<td>10.5%</td>
<td>30.1%</td>
</tr>
<tr>
<td>English Russell Group Ranking</td>
<td>3³rd</td>
<td>5⁷th</td>
</tr>
</tbody>
</table>

Of course, these figures in part reflect the social realities of the City and region within which the University sits. Liverpool has been marred by high levels of social deprivation for several decades and today that reality remains unchanged. The gaps between Liverpool and national averages for instance still place Liverpool at or near the bottom of the league table for many measures of social deprivation. Ratings provided by the Centre for Cities Crisis Outlook 2012 showed that Liverpool (out of 64 city areas²) was placed: 60th for employment; 43rd for average weekly earnings; 60th for Job Seeker’s Allowance (JSA) claimant count; and 61st for long-term claimant count. The Index of Multiple Deprivation (IMD)³ also provides a comprehensive picture of poverty levels in the City and the headline points of the executive summary of the 2010 IMD figures for Liverpool⁴ illustrated the extent of the problem all too vividly:

- **Liverpool remains the most deprived Local Authority area in England.**
- **Almost a quarter of England’s 100 most deprived small areas are in Liverpool.**
- **Health, Employment, Income, and Living Environment domains have the highest levels of deprivation.**
- **The pattern of deprivation in the city region is largely concentrated in Liverpool and the “inner core”**.
- **However there are other areas of substantial deprivation across the city region.**

¹ Higher Education Statistics Agency Performance Indicators (HESA): Table 1a (2010-11 Young full-time first degree entrants).
² These are the ‘primary urban areas’ (PUA) used by the Centre for Cities. For Liverpool the PUA comprises Liverpool, St. Helen’s and Knowsley.
³ The 2010 IMD report is the most current available. The next expected update will be published in 2015.
⁴ Liverpool City Council (2011), The Index of Multiple Deprivation 2010: A Liverpool analysis.
Concerning though these patterns of deprivation are and important in providing a context for considerations of educational and social fairness, they do not alone explain the performance of the University of Liverpool in this regard. When scrutinised more carefully and when broken down at different organisational levels, a picture of incremental improvement is clear across a range of measures for groups specified in the University’s Access Agreements over recent years. In its Access Agreement for 2015-2016, for instance, the University is able to report positively for recruitment from low participation neighbourhoods (LPN), state school and below-average income indicators.\(^5\)

Although these improvements are not consistent across the whole of the University, they represent a dominant trend in that most academic subject-areas show upward trajectories on at least some of the measures of interest to OFFA. Indeed taken together, these faculty, school and departmental shifts present an impressive picture of institutional change and, as this evaluation will show, of professional effort.

2. Complexity and evaluation

The topic of this evaluation report is the ways and means by which people from positions of disadvantage, whether these are related to class, ethnicity, gender or disability, access and progress at the University of Liverpool. The personal journeys of those who achieve university places from such backgrounds involve myriad social and psychological factors that combine to impede or open the ‘path to university’. The complexities of social and personal life and their interactions with institutional and pedagogical processes are widely acknowledged (Hockings \textit{et al.}, 2008; Sander 2009; Singh 2011; Stephenson 2012a; Round \textit{et al.}, 2012; Burke \textit{et al.} (2013). For these reasons, at an early point in the current British WP agenda, Thomas (2001) presciently noted that focusing upon one factor over all others would be “unlikely to be the most effective way of addressing the complex issues surrounding low participation by some sectors of society”. Indeed, it remains the case that structural and cultural obstacles are waiting for students from such backgrounds even within the University itself. As Burke and McManus (2013) have argued:

\begin{quote}
This is about histories of institutional racism and classism that have seeped into the very structures, practices and discourses in higher education that are attempting to eradicate social inequality. (Burke and McManus, 2011: 69-69.)
\end{quote}

Disadvantage for the individual then is not something that disappears at the point of entry into HE. This has led OFFA to emphasise the importance of adopting a ‘whole lifecycle’ approach to WP and to Fair Access.

A clear message in the national strategy is that an effective approach to access should not stop at the front door when a person enters higher education. Disadvantage can follow you like a shadow down the years, affecting the degree you end up with and your ensuing postgraduate study or search for a job. For access to be meaningful, there must be appropriate support for students as they progress through their studies and continue to employment or postgraduate study. OFFA therefore takes a broad view of access, challenging universities and colleges to look not just at how they can diversify their student intake, but also at how they can engage across the whole student lifecycle. (Ebdon, 2014)

These concerns have influenced the approach to evaluating WP and Fair Access at the University of Liverpool. The aim has been to consider the relationship between relevant professional practice and key measures of interest for this agenda.

We have noted the complexities of the ‘learner’s journey’ from circumstances of objective difficulty to successful educational outcome. However, we must acknowledge another type of complexity that poses a challenge to evaluating WP and Fair Access work. This is the organisational complexity of the University itself. The University is a large and dynamic system that operates at many different levels of structure and professional life. Professional histories and working cultures can vary greatly between faculties, from one department to the next and so on. Data-effects need to be appreciated in this light and in connection with specifically relevant work.

With this approach we are attentive to context: specific data-effects being the result of the work of specific professional teams in specific settings. What appears to have been successful in one situation may not be so in another for a host of unseen variations of professional circumstance. This emphasis on context will also influence the style of external reporting. Claims made for effectiveness should be for what we believe is working here at the University of Liverpool towards improving professional practice and outcomes, and that may be applicable elsewhere. This does not mean that no transferable insight can be achieved. It does however mean that models that have emerged from one area of practice should not be simply applied to another. This awareness cautions against a ‘one-size-fits-all’ approach to evaluation within the University and indeed across the HE sector.

3. Evaluation and the Access Agreement

The University of Liverpool Access Agreement (2014-2015) reports the achievements of the University in working towards its milestones and targets for WP and Fair Access as well as for meeting the requirements of the Equality Act 2010 and the Public Sector Equality Duty. It also lays out the challenges that remain for the University. For each of
these challenges it explains the University’s strategic approaches and specifies the programmes and investments supporting them.

This evaluation is designed to support the University’s work towards improvement with respect to the milestones and targets of the Access Agreement, as well as its efforts to reduce and eliminate inequalities within the student population. In general terms, it does this by: illuminating those areas where good practice appears to be producing results; highlighting those examples of good practice for consideration across the University; and informing professional dialogue and reflection upon how to improve practice, and thus enhance institutional performance. So:

More specifically, and referring to particular parts of the Access Agreement (2014-2015) this report offers the following:

- the collation of evidence from across the University and for many departments of work;
- historical quantitative data relating to target 5a.2 (numbers of registrations from students with disabilities), target 5a.6 (recruitment of students from low participation neighbourhoods), target 5a.7 (recruitment of students from NS-SeC 4-7 backgrounds), and target 5a.8 (proportion of students admitted from NS-SeC 4-7 backgrounds across specified budget-centres);
- survey data relating to target 5a.1 (to increase the numbers of Liverpool Scholars progressing to HE/degree programmes), target 5b.2 (to continue developing a network of Partner and Associate schools and colleges), target 5b.5 (to increase the numbers of young people on the Scholars programme), and target 5b. (to increase applications for entry to HE from Partner and Associate schools);
- other types of data provided by professional services and covering student perceptions of the University, supported admissions, entrance requirements and the University’s work to support disabled students;
- retention data down to budget-centre level;
- data analysis relating to practice for outreach;
- data relating specifically to the Scholars programme;
- data analysis relating to the use of the University’s museum collections;

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6 Access Agreement targets and milestones are organised into separate tables: ‘applicants, entrants or student body’ (table 5a.); and ‘outreach work’ (table 5b.).
• data relating to the University’s Equality Action Plan (2012-2015) and Athena SWAN Bronze Action Plan (2013-2016);
• data relating to collaborations for WP and Fair Access;
• data relating to the Schools Partnerships Strategy;
• data relating to mature students;
• data relating to employability;
• recommendations for evaluation, taking an ‘institution-wide overview’;
• ‘evidence of effectiveness’ towards raising aspirations, influencing learner choice, improving retention, supporting learner graduation and maximising employment success;
• ‘evidence of effectiveness’ for inclusive learning environments in relation to ‘age, disability, race and gender’.

4. An evaluation model

4.1 Underpinning principles

The guiding principle for the design of this evaluation has been that of relating data-effects to the work of colleagues at different organisational levels. The term ‘data-effect’ is not used to imply any assessment of professional performance. Indicator trends can obviously vary for reasons that lie entirely out of the hands of the practitioners who are responsible for the relevant work. ‘Work’ here normally means the programmes, practice innovations, policy developments, collaborations and so on that aim to improve access for disadvantaged social groups and their eventual success post-entry. The intention of course is to produce insights of purpose for colleagues in their efforts to improve the recruitment, retention and success of Access Agreement target groups. It is also however to demonstrate an approach to evaluation that can work for the future. The ambition of the model then is that of moving the University of Liverpool towards an evaluation culture for WP and Fair Access, in which continuous evaluation operates in a cyclical manner, towards improved professional practice. In this sense, it is about organisational change.

The considerations described have led to a ‘whole-institution’ model of evaluation. This does not mean that the evaluation has been comprehensive in its coverage of programmes and activities. It does mean that an extensive range of academic and professional departments were treated as relevant to the evaluation. Concomitant with this has been a working assumption that within the University there is a wealth of WP experience and expertise as well as professional insight into what is effective. Historically, this reserve of knowledge has been dispersed across the University and has existed in an unsystematic fashion, often being the preserve of individual enthusiasts and small groups of staff working in isolation from one another. This has presented a further complication for the evaluation of the University’s WP and Fair Access work. To overcome this
challenge an embedded evaluation style was adopted, using engagement with many professional and academic colleagues and teams. This decision led to the implementation of an Access and WP Practitioner Forum open to all staff whose work related in any way to WP and Fair Access.

The centrality of staff-engagement to the evaluation methodology further presupposed essential operational values. Crucially, these were: a commitment to dialogue based upon professional trust; and an Appreciative Inquiry (AI) approach, seeking to learn from what is seen to be working.

Alongside of the staff-engagement aspect of the model runs an engagement with already existing and pilot-study generated data. This combination of dialogue and data makes the approach of the ‘theory-based’ type (e.g. van der Knapp 2004) that incorporates both positivist commitments to evidence that is independent of stakeholder perceptions and cognitive-constructivist concerns with the stakeholder experience, to maximize reliability, validity and authenticity in evaluation reporting. More specifically within the family of theory-based evaluations Realist Evaluation, that operates at a ‘middle-range’ of explanation between high-level generalisation and programme specificity, best captures its conceptual design.7

Realist evaluation steers a path between making universal claims about what works, and focusing on the particulars of specific measures in specific places relating to specific stakeholders. (Pawson and Tilley 2004:17)

Considering AI, whilst this approach foregrounds ‘the positive’ for the purpose of learning, it is not the same as a ‘celebratory’ model that merely presents encouraging ‘stories-from-the-field’. AI is intended towards authentic organisational learning and operates with types of rigour appropriate to professional workplace settings. The focus is upon gaining insights into why things that work do so, and seeks to transfer these insights across an organisation in order to enhance and improve outcomes in new areas of work (Cooperrider and Whitney 2000; Cooperrider et al. 2003). The application of AI to evaluation is relatively new and has grown out of a burgeoning interest in participatory and stakeholder-centred evaluation models. It is regarded as being especially useful for evaluation in the following contexts:

- where there are varied groups of stakeholders who know little about each other or the programme being evaluated;
- when change needs to be accelerated;
- where dialogue is crucial to moving an organisation forward;

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7 This Realist model of hypothesis formation, refinement and testing to capture people’s reasoning and their choices in complex settings, is recognised in the HM Treasury’s Magenta Book: Guidance for evaluation (2011) that sets standards for public sector evaluations.
• where there is a desire to build evaluation capacity – to help others learn from evaluation practice;

• where there is a desire to build a community of practice;

• where is it important to increase support for evaluation. (from Coghlan et al. 2003. P.19)

AI is useful then for situations in which an evaluation project requires some mobilisation of professional energies and enthusiasm. In a first substantive phase of evaluation work, in a complex organisation in which stakeholder engagement is critically important and where the circumstances listed above apply, AI brings with it advantages for establishing longer term evaluation efforts. This was the rationale for its application for the evaluation of WP and Fair Access work at the University of Liverpool in its first substantive phase.

4.2 Boundaries of the methodology

To the complexities already described we can add further types. Each of the student characteristics can be disaggregated by various measures relevant to the Access Agreement: undergraduate population; applications; admissions; progression; retention; graduation; and destination. They can be aggregated for long-term annualised trends, comparisons over two years, bench-mark performance and sectoral performance. The different organisational levels of the University work through many types of policy and practical delivery operating with specific professional dynamics. This report does not capture all of these types of complexity. Rather, the evaluation inquiry has been organised along axes that were feasible within practical constraints and each of which raised its own types of complexity and challenge.

• Regarding Access Agreement target groups data-analysis was conducted for a selected range. As comprehensive a range as was possible was chosen within the limitations of evaluation capacity. Guided by the prominence given to socio-economic indicators by OFFA, these were scrutinised the most extensively. Within this, LPN data was the most disaggregated for applications, admissions, undergraduate population and retention. This does mean that the treatment of groups is uneven. Of course, each group warrants special attention and a dedicated exploration of the kinds of need involved and the types of support required.

• Some areas of policy development and programmes have received only slight mention where they clearly warrant special study for their importance. The piloting of contextual data for admissions is one example of this. Another is the Go Higher programme aimed at the recruitment of mature students. A third

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example would be the use of peer-mentoring in many departments. A fourth would be Realising Opportunities, a collaboration of fifteen research intensive universities working towards improved access for target groups of students.\(^9\) Each of these deserves an in-depth case-study focus that was beyond the practical scope of this evaluation phase.

- Similarly, the discrete activities highlighted in this study were those that were brought to the evaluator’s attention in surveys, interviews and practitioner forums. They do not represent an exhaustive account. No doubt, there will be many activities not mentioned here that are of great value for this agenda.

- The majority of quantitative data has been produced using the University’s Data Explorer tool. Data Explorer is continually updated and so some variation occurs over time. So, whilst the ‘shape’ of the data for any given search does not normally change, the numerical detail can. For this reason, the dates of accessing and verifying data have been provided.

- Statistical testing for significance at 95% confidence has been conducted for all data where appropriate. For annualised data over some years Chi-square ‘k by 2’ trend analysis has been used. For target-group/population comparisons over two years Chi-square ‘2 by 2’ tests have been applied. Whilst an indicator measure may not be statistically significant in isolation, making random variation a possibility, considered alongside other effects it may retain interest as a guide to further inquiry. So, where statistical significance does not exist this has not always been used to exclude the data, particularly where positive-effects cluster together and align with a specific activity or innovation. Where statistical significance exists it has been indicated as a footnote in bold font.

- Analysis of retention going back over a number of years raised a specific difficulty. ‘Retention’ is not identical to ‘progression’: students who do not progress between years may still keep their place whilst not appearing in the population figures as a result of deferral, course transfer, repeat years, work-placement etc. This can create the anomalous situation of a ‘retention’ measure exceeding 100% where students return after a period of absence or join a programme in Year 2. Progression data is only available for two successive years and so does not support longer-term trend analysis. Since trends in retention are of interest they have been produced by comparing Year 1 and Year 2 undergraduate populations. The ‘retention’ figures presented must be read then as an approximate indicator of how well designated groups are being retained as they move through their courses of study. Where a calculated retention figure has exceeded 100% the proxy term ‘full-retention’ has been used.

Historical context is important to acknowledge. Many of the effects commented upon in the report will have been the result of professional efforts going back many years. An important example here is the legacy of Aimhigher that supported WP and Fair Access work at the University and across the HE sector until its abolition in July 2010. This is especially relevant given that many data used in this report date back to E2007.\(^\text{10}\)

### 4.3 Sources of data

Data used in this phase of the evaluation work has come from five sources.

Firstly, a systematic trawl through the University’s data warehouse (Data Explorer) for eleven measures and at University-wide, faculty (L3), school (L2) and departmental (L1) levels. These were:

- LPN\(^{11}\)/home/undergraduate population/Years 1-3/from E2007 to E20013;
- LPN/home/applications/for E2012 and E2013;
- LPN/home/admissions/for E2012 and E2013;
- LPN/home/undergraduate Y1 to Y2 retention/from E2007-8 to E2012-13;
- NS-SeC 4-7\(^{12}\)/home/undergraduate population/Years 1-3/from E2007 to E20013;
- disabled student/home/undergraduate population/Years 1-3/from E2007 to E20013;
- mature students\(^{13}\)/home/undergraduate population/Years 1-3/from E2007 to E20013;
- women students/home/undergraduate population/Years 1-3/from E2007 to E20013;
- part-time/home/undergraduate population/Years 1-3/from E2007 to E20013;
- care leavers/home/undergraduate population/Years 1-3/from E2007 to E20013;
- ethnicity\(^{14}\)/home/undergraduate population/Years 1-3/from E2007 to E20013.

\(^{10}\) ‘E’: ‘Entry Year’
\(^{11}\) Low participation neighbourhood (Polar 3).
\(^{12}\) National Statistics Socio-economic Classification
\(^{13}\) Over 21 years.
Secondly, WP leads were interviewed to capture the range of types of student support within academic departments and of outreach activity across the University conducted by professional services teams and by academics.

Thirdly, the following University data was provided by professional services teams:

- financial awards data (including accommodation and tuition fee waivers for E2012 and E2013);
- Disabled Student Allowance awards data from E2007 to E2013;
- numbers of students with non-traditional qualifications\textsuperscript{15} given places from E2007 to E2012.

Fourthly, WP and Fair Access evaluation questions were included in the University’s 2014 Applicant Survey. These were ‘student-characteristic’ questions intended to be used for cross-tabulation analysis.

Fifthly, where data was scarce pilot study research was conducted in order to generate evaluation evidence. This was particularly true of much of the University’s outreach work where in-house post-entry tracking data not apply. In some cases, further research was conducted in order to strengthen findings.

Ethical approval for pilot study research was applied for and granted through the Centre for Lifelong Learning Ethics Committee.

\textsuperscript{14} These included: ‘Chinese or ethnic background Chinese’; ‘Asian or Asian British-Indian’; ‘Asian or Asian British-Pakistani’; ‘Black or Black British African’; ‘Other Ethnic Background’; ‘Mixed White Black Caribbean’; ‘Other Black Background’; ‘Mixed White Black African’; ‘Asian or Asian British Bangladeshi’; ‘Black or Black British Caribbean’; ‘Arab’; ‘Irish Traveller’; ‘Gypsy/Traveller’. ‘BME’ (black and minority ethnic) has been used to designate this group.

\textsuperscript{15} Accepted non-traditional qualifications and the combinations used vary from subject to subject and vary also according to which types are primarily or secondarily used for decisions. However, the following are typical of many subjects and for this top-level analysis an aggregation of all types has been used: Baccalaureate; Diploma at level 3 HNC or HND (including BTEC & SQA equivalents); International Baccalaureate (IB); Diploma Level 3 qualifications of which none are subject to UCAS; Tariff Level 3 qualifications of which some or all are subject to UCAS; Tariff ONC or OND (including BTEC & SQA equivalents); other HE qualification of less than degree standard; Certificate of Higher Education (Cert. HE); Welsh Baccalaureate; Advanced Diploma (level 3) qualification; Access course (QAA recognised); Foundation course at HE level HNC or HND (including BTEC & SQA equivalents); 14-19 Advanced Diploma (level 3); Diploma of Higher Education; Higher National Diploma (HND) (Dip. HE); Undergraduate credits.
4.4 Data matrix

All positive-effects for the data search combinations were input into an Excel ‘data-matrix’ that allowed alignments to be seen and clusters of positive-effects to be easily identified. This also provided a tool by which data could be analysed at all organisational levels: University; faculty; school; and department. An ‘activity’ column further enabled these to be aligned with innovation and professional effort.

4.5 A systems-based evaluation model

As a final point here, it should be noted that this combination of different sources of data makes this a ‘systems’ evaluation model in that wherever possible its methodology has involved incorporation into the normal working processes of the University. Attendance by the evaluation-lead at faculty WP forums, engagement with the market research team within the Student Recruitment and Admissions Office (SRAO), the seeking of ethical approval for research and so on, have all aimed at making the evaluation a normal part of WP and Fair Access work. Indeed, this has been an important feature of the embedded approach adopted.

4.6 Applying the model I: the general model

The ‘general model’ of the evaluation comprises the following elements: existing University post-entry data at Levels 1, 2 and 3; outreach and student support activity mapping; professional perspectives and intuitions; cross-University data; and pilot study research. The evaluation cycle that this creates can be represented in simplified form as follows:

At this stage the interest of the evaluation has been to establish correlations of data to activity. Where ‘positive effects’ can be identified in the data these have been aligned

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16 ‘Positive effects’ are defined as: long-term annual proportional increases; recent proportional recovery; increase over two years (normally for E2012 and E2013); and data-resilience (where proportions remain above national averages, despite an overall decline). All such effects have been tested for statistical
with ‘activity’ such as student support, new policies and distinctive outreach design. Professional perspectives have then been elicited to shed explanatory light upon these correlations. At this stage the attributions of ‘cause-and-effect’ are tentative only.

The ‘tentative attributions’ stage of the evaluation cycle generates ‘jumping-off’ points for further inquiry. Treated in this way, many of these tentative attributions assume the status of hypotheses in need of testing through pilot-study research. In this second cycle, the attributions offered become more evidenced, allowing stronger claims to be made. The logic of the ‘general model’ then can be graphically represented in the following fashion.

4.7 Applying the model II: two ‘starting points’

In its application, this general model in fact required two starting points for different ‘data contexts’. Once students have entered the University they are tracked by student characteristics, progression, attainment etc. Indeed, within the University’s data-warehouse there is a wealth of post-entry data that has been advantageous for this evaluation. For those extensive areas of the University’s work where this data is applicable and relevant, existing data has been the effective starting point. However, for the University’s ‘pre-entry’ WP work with schools and colleges this is not the case. This situation will improve with the purchase of the Higher Education Access Tracker (HEAT) system to which the University is committed. In the meantime, in the absence of accessible pupil-tracking data available to academic researchers data has been generated with pilot-study research. For this situation the starting-point in the evaluation cycle has been the perspectives of outreach practitioners and their intuitions about what they think is effective when they are working with children and prospective students. (For a step-by-step guide to the methodology see Appendix I).

significance and by comparison with national averages where these are available. Particular interest has been given to departments that show clusters of such effects.

18 Data linked to the ‘unique learner number’ by which pupils education journey can be tracked is not yet accessible to researchers in England.
5. Findings

5.1 Exploring University data: applications; access; and retention

5.1.1 A changing student profile

A first survey of the available cross-institutional data reveals a discernible shift in the University's student demographic profile. Importantly, considering the challenge from OFFA that Russell Group universities ‘diversify’ their applicant pools, the proportion of home applicants for undergraduate study coming from LPN backgrounds increased from 24.7% (7,151) in E2013 to 24.9% (7,490) in E2014.\(^{19}\) Across the University the ethnic composition of the student population is also changing. Since E2007 the BME proportion of the undergraduate (Years 1-3) home student population increased from 11.1% (1,273) to 14.7% (1,684) in E2013.\(^ {20}\)

![Graph showing University of Liverpool: BME home undergraduate (Years 1-3) students](image)

Surveying the available data at faculty level reveals further evidence of change. Across the faculty of Health and Life Sciences (HLS) for example, along with the increasing social diversity of applicants (23.2% (3,084) LPN undergraduate students in E2012 to 24.2% (2,962) in E2014\(^ {22}\)) there is also a long-term improvement in the retention of these students. For E2012 to E2013 100% LPN students were retained from Year 1 to Year 2, compared to 90.2% for the E2008 to E2009 cohort.\(^ {23}\) The proportion of BME home undergraduate students has also increased markedly from 15.9% (700) in E2007 to 21.1% (1,001) in E2014.\(^ {24}\) The faculty of Humanities and Social Sciences (HSS) also shows a pattern of change. Along with an increase in the proportions of LPN applicants (from

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\(^ {19}\) Data accessed and verified 16 December 2014. \(P=0.51\)
\(^ {20}\) Data accessed and verified 16 December 2014. \(P=0.0004\)
\(^ {21}\) Data accessed and verified 16 December 2014. \(P<0.0001\)
\(^ {22}\) Data accessed and verified 17 December 2014. \(P=0.07\)
\(^ {23}\) Data accessed and verified 17 December 2014. \(P<0.0001\)
\(^ {24}\) Data accessed and verified 17 December 2014. \(P<0.0001\)
24.1% (1,916) in E2012 to 25.5% (2,824) in E2014, there has also been an improvement in Year 1 to Year 2 retention of LPN students from 88% for E2007 to E2008 to 95.7% for E2012 to E2013.\textsuperscript{25} Within the faculty of Science and Engineering (SE) the proportion of LPN applicants increased from 25.3% (1,411) in E2012 to 26.7% (1,635) in E2013.\textsuperscript{26} SE has also seen an increase in the numbers of BME home students studying on its degree programmes, from 8.6% (212) in E2011 to 11.8% (322) in E2014.\textsuperscript{27}

It is at the level of particular schools and departments however, that the most concentrated patterns of change are apparent. Examples from each of the faculties chosen to give a range of types of positive effect, will illustrate this.

5.1.1.1 The School of Veterinarian Science

Data for the School of Veterinarian Science within HLS, show that its student population profile has year-on-year become more diverse in terms of class, ethnicity and age composition. The proportion of LPN students within the home undergraduate population has increased from 12.3% (54) in E2007 to 17.4% (105) in E2013.\textsuperscript{28} The proportion of home students from NS-SeC 4-7 backgrounds has increased from 15.1% (66) in E2007 to 17.1% (110) in E2013.\textsuperscript{29}

\begin{figure}[h]
\centering
\includegraphics[width=\textwidth]{veterinarian-science.png}
\caption{Veterinarian Science: LPN home undergraduate (Years 1-3) students}
\end{figure}

\textsuperscript{25} Data accessed and verified 10 September 2014. \textit{P = 0.03}
\textsuperscript{26} Data accessed and verified 17 December 2014. \textit{P = 0.18}
\textsuperscript{27} Data accessed and verified 17 December 2014. \textit{P = 0.0001}
\textsuperscript{28} Data accessed and verified 11 September 2014. \textit{P = 0.02}
\textsuperscript{29} Data accessed and verified 11 September 2014. \textit{P = 0.18}
\textsuperscript{30} Data accessed and verified 15 September 2014. \textit{P = 0.41}
The proportion of BME students within the home undergraduate population has increased from 1.7% (8) in E2008 to 3.5% (21) in E2013. For E2013, the proportion of mature home undergraduate students increased to 17% (103) from 6% (26) in E2007.

The large majority of undergraduate students are now women, standing at 81.1% of the students on degree programmes in E2013, having risen from 76.5% in E2007. The Year 1 to Year 2 retention of LPN students has improved from 73% (15-11) for E2009 to E2010 to ‘full-retention’ (23-24) for E2013 to E2014. Finally, the NS-ScE 4-7 progression for E2013 of 83% stood close to the institutional budget-centre average of 84%.

5.1.1.2 The School of Sociology, Social Policy and Criminology

Within HSS, trends over recent years for the School of Sociology, Social Policy and Criminology when considered together register a shift towards greater diversity on some measures. The proportion of disabled students within the undergraduate population increased from 7.3% (19) in E2009 to 15.0% (25) for E2012.
The Year 1 to Year 2 retention rate for LPN students improved from 87.1% for E2007 to E2008 to 96% for E2011 to E2012.\(^\text{37}\)

The proportion of LPN prospective students applying to the School increased from 26.2% (146) in E2012 to 30.2% (144) in E2013.\(^\text{39}\) Against a slightly reduced overall total, the proportion of admissions for LPN students also rose over the same period from 38.9% (30) in E2012 to 41.5% (27) in E2013.\(^\text{40}\) Finally, within a general expansion of student

\(^{36}\) Data accessed and verified 15 September 2014. P = 0.07
\(^{37}\) Data accessed and verified 9 September 2014. P = 0.24
\(^{38}\) Data accessed and verified 9 September 2014. P = 0.79
\(^{39}\) Data accessed and verified 10 September 2014. P = 0.23
\(^{40}\) Data accessed and verified 11 September 2014. P = 0.75
numbers, proportionately more women study on the School’s programmes, the rate having risen from 71.7% (195) of the total undergraduate population in E2008 to 77.5% (156) in E2013.41

5.1.1.3 The Department of Chemistry

Within SE, the Department of Chemistry shows evidence of change. The proportion of BME students within the undergraduate population for example has increased from 6.2% (16) in E2009 to 9.9% (31) in E2013.42

Proportions of part-time undergraduate students are also increasing, having risen from 3.1% (8) for E2009 to 7.0% (22) for E2013.43

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41 Data accessed and verified 12 September 2014. P = 0.15
42 Data accessed and verified 10 September 2014. P = 0.22
43 Data accessed and verified 15 September 2014. P = 0.13
44 Data accessed and verified 10 September 2014. P = 0.04
45 Data accessed and verified 15 September 2014. P = 0.08
Proportions of mature home undergraduate students have risen within the Department from 4.1% (10) in E2007 to 6.7% (21) in E2013.\textsuperscript{46} The proportion of prospective students applying for chemistry from LPN backgrounds has increased slightly from 27.9% (164) for E2012 to 28.5% (167) for E2013.\textsuperscript{47} The rate of LPN admissions has also improved, rising from 27.4% (48) in E2012 to 31.7% (52) in E2013.\textsuperscript{48}

5.1.2 Contextualising change

5.1.2.1 The ‘local’ within the ‘national’

The picture provided by these departments could be repeated for many others, with variations. The data for the whole of the University and within faculties reveal patterns of change over recent years. This will become increasingly apparent as further detail is given for the key themes within this report, and with each example given. It is important to note here however that these trends serve to counter a suspicion that the University of Liverpool’s strong showing for WP and Fair Access is simply explained by its geographical location within an area of high relative socio-economic deprivation. The data indicates that changes have been occurring for a number of measures over recent years. Since the demographic profile of the City of Liverpool region is unlikely to have changed to an extent that would explain these trends, the only other possible explanations are that there have been significant relevant changes to the environment within which the University operates e.g. national trends for specific types of student and within subject areas, or that the University itself is changing in ways that are contributing to or even creating these effects. For the first of these, comparisons with national averages will help to contextualise or if necessary rule-out any more local effects. In fact, on some important indicators the trends in University of Liverpool data, rather than suggesting national trends merely registering at the local level, seem to indicate a more specifically local effect: or at least a local effect within a national trend. The trend for LPN data since 2009, showing an upward divergence from English Russell Group averages, provides one illustration of this.\textsuperscript{49}

\textsuperscript{46} Data accessed and verified 10 September 2014. \( P = 0.18 \)

\textsuperscript{47} Data accessed and verified 10 September 2014. \( P = \textbf{0.015} \)

\textsuperscript{48} Data accessed and verified 10 September 2014. \( P = 0.45 \)

\textsuperscript{49} The HEIDI database holding the Higher Education Statistics Agency data for the UK HE sector does not presently support analysis of national trends for WP characteristics at subject area level.
Another example, and one that is important for the University of Liverpool given that it has lagged behind national averages in recent years in this area, is the uptake of the Disabled Student Allowance by students who have a known disability. Here the data shows steady improvement, but more importantly for the point being established here, it also shows a closing gap with respect to the English Russell Group averages since E2009.

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50 HEIDI statistics for University of Liverpool compared to 22 English Russell Group institutions. Accessed 16 September 2014.
51 HEIDI statistics for University of Liverpool compared to 22 English Russell Group institutions. Accessed 16 September 2014
The upward trends in the proportions of disabled students within many subject areas are also reflected in monitoring data provided by the University’s Disability Support Team (DST). Between E2010 and E2012 the numbers of self-declared disabled students increased by 19.3%. There was a 74.3% increase between E2009 and E2012 in the numbers of students applying for individualised support. One-to-one scheduled adviser appointments rose by 69.9% between E2008 and E2012. Drop-in appointments more than doubled between E2011 and E2012. The numbers of students using support workers increased by 74.9% between E2009 and E2012.\(^{52}\)

Considering our charts once more, it does appear that improvements in the University of Liverpool’s data performance cannot be simply explained in terms of changing patterns across the national HE sector. It is the latter possibility suggested above then, change of and within the University itself, with which this report is principally concerned.

5.1.2.2 The Applicant Survey\(^{53}\)

Regarding improvements in the proportion of LPN prospective students applying to the University, so helping to ‘diversify’ the applicant pool, the findings of the E2014 Applicant Survey are illuminating. As a first observation, sixteen out of 27 schools and departments show increases in the proportions of LPN students applying to their courses. Fourteen have increased their LPN undergraduate admissions. In many cases, prior contact with the University will have been a part of the story. 76% of respondents for example said that they had found information gained from University staff who visited their school during Years 12 and 13 ‘fairly’ or ‘very useful’. Indeed 60% said the same in relation to visits during Years 7-11 and 24% recalled finding such visits useful when they were at primary school.\(^{54}\) By breaking the survey data down further, we gain more insight into how students from less advantaged and non-traditional backgrounds have made their decisions about entering HE and coming to the University of Liverpool. Four factors are considered here.

5.1.2.2.1 Employability

60% of students who had come to the University with BTECs as their principal entry qualification said that ‘employment opportunities after graduation’ had strongly influenced their decision to accept a place compared to 46% of A level students.

35% of BTEC students said that work placement opportunities had been a strong influence, compared to 29% of A-level students. 31% of BTEC students also said that the opportunity to work abroad had been influential compared to 24% of A-level students. Indeed 10% of BTEC students stated that their assessment of the

\(^{52}\) All data provided by the DST, June 2014.

\(^{53}\) Data available as percentages only.

\(^{54}\) These are percentages of respondents to particular questions, rather than of all survey respondents.
employment opportunities after graduation was the single most important criteria for them compared to 4% of A-level students.

Similar patterns were found for questions that distinguished between students whose parents had had no experience of university and those whose had. So, for example 49% of students whose parents had had no experience of university reported that ‘employment opportunities after graduation’ had been a strong influence, compared to 44% of all A-level students.

5.1.2.2 Support

Amongst respondents from the lower two Polar 3 quintiles, 30% said that the types of support available at the University had been strongly influential for their final decision, compared to 27% from the upper quintiles. Differentiating according to parental experience of HE the figures were 31% and 24% respectively. 38% of BTEC students said that this was a strongly decisive factor for them, compared to 27% of those who had come through the traditional A-level route.

5.1.2.3 Finance

Financial support was another criterion that showed a pattern along social and educational differentials. Amongst BTEC respondents for example, 24% reported that getting a bursary had been an influence compared to just 11% of A-level students.

5.1.2.4 Student perceptions

The survey data reveals a range of perceptions that were important to students who had decided to take up offers of a place at the University of Liverpool. Again, some of these break down in significant ways for our purpose here. For instance, 64% of these students whose parents had had no experience of university, said that they felt that the University was somewhere they could ‘fit in well’, compared to 57% of A-level students. However, it is also important to acknowledge that this survey result is contradicted by other findings arising from it. So, for example 56% of BTEC students said that they saw the University in this way, compared to 62% of A-level students. Different perceptions of social status were also present in the survey data. A lower proportion of BTEC students saw the University as being ‘down-to-earth’ (64%) than A-level students (72%), whereas, much higher proportions of BTEC students saw the University as ‘elite’ (85%) and ‘traditional’ (84%) compared to A-level students (61% and 66%, respectively).

The interpretation of these latter findings is helped by other data from the survey relating to students’ perceptions of the academic standing of the University. These students had already been offered and had accepted places. Whatever negative perceptions they may have had of the University, these had not prevented them from
accepting their places. It is interesting to note then that throughout the survey data there was a consistent pattern of less advantaged and non-traditional students being more likely than A-level students to give indicators of academic standing high ratings. To illustrate, 26% of students whose parents had not attended university said that ‘league table position’ had been a strongly decisive factor for them, compared to 23% of A-level students; and 65% said that ‘University reputation’ had been strongly influential, compared to 58% for A-level students. Amongst students from the lower two Polar 3 quintiles, 15% said that ‘University reputation’ had been the single most important factor, compared to 9% for A-level respondents. These differences are small in some cases: the pattern however is consistent. It does appear that academic reputation is itself a motivating factor for at least some less advantaged, though very able students in applying to and accessing the University of Liverpool.

5.1.3 Mapping trends against activity

As explained earlier, patterns of change are apparent in the data across the University and are quite pronounced at departmental levels for many subject areas. These will in part be related to system changes at the institution-wide level. Improvements in the flagging and filtering of students for WP characteristics for instance as well as the targeting and internal tracking of these students by SRAO for the purposes of initial engagement, focused communications and sign-posting of support are likely to have had a general effect across many or all departments. Faculty-level involvement is also likely to improve the consistency of the design of outreach and access approaches across departments. One example of this is faculty-level management of post-application visit days (PAVs) in HSS. Another is the creation of a graduate advocate post within HLS.

In many cases however, trends are coincident with new activity or with established activity that has been refreshed, extended or enhanced within departments. Where data analysis has revealed changes in the student profile, these have been mapped against reports of activity within faculties, schools and departments. Where alignments between data trends and activity have been identified, the relevant colleagues have been asked for their professional assessments to establish correlations and tentative attributions of cause and effect. In these cases, the insights produced will serve to effectively position more focused evaluation work within those departments. In some areas pilot-study research has provided further insight. The findings produced are reported here in a thematic fashion, with examples from faculty, school and departmental levels of analysis.

5.1.3.1 Selection, recruitment and admissions

Within subject-areas there are examples of innovation in how candidates are assessed for their suitability for undergraduate programmes.
5.1.3.1.1 Assessing the prospective student

In the School of Veterinarian Science the multiple mini-interview (MMI) format was introduced as part of the selection process in 2007. This selection format represents a sharp break from the traditional panel-interview style. Candidates spend just five minutes at a ‘station’ responding to questions and prompts upon a theme before moving to the next station. There are eight stations in all. At each station an interviewer will score the candidate using a standardised template. The interviewer has minimal information about the candidate before they present themselves to that station and certainly there is no prior knowledge of school, personal history or previous experience.

The introduction of MMI for the University’s veterinarian undergraduate programmes does coincide with changes to the data-profile of the School. Within the cluster of positive-effects that characterises the School for example, the proportion of students from LPN backgrounds has increased from 12% (54) in E2007 to 17% (105) in E2013. Similarly, the proportion of students from NS-SeC 4-7 has increased from 15% (66) in E2007 to 18% (110) in E2013. The proportion of mature students has increased from 6% (26) in E2007 to 17% (103) in E2013 and the proportion of BME students has increased from 1.7% (8) in E2008 to 3.5% (21) in E2013. These data do suggest a general shift in the recruitment pattern towards greater inclusivity for these groups. Given the frequency of these types of change and the concentration of positive effects that begin shortly after the introduction of MMI, it is plausible to suggest that these changes have in part at least resulted from its introduction. To explore this possibility, pilot-study research was conducted amongst staff that had experience of the MMI process for their assessments of its transparency, reliability, consistency and fairness. We are concerned here principally with assessments of fairness.

39 members of staff responded to a survey that asked them to respond to statements regarding the degree to which MMI is fair to candidates and to which it reduces social bias, personality bias and interview-coaching as selection factors. Most (69%) did rate MMI as being “fair to all types of candidate”. A large majority (77%) also believed that MMI is “open and transparent”. However, when asked if the “MMI process effectively filters out the candidate’s social background as a selection factor” staff were more divided in their views with 38% in agreement and 46% disagreeing. When asked if MMI “effectively filters out personality bias as a selection factor” 36% agreed, but 41% disagreed.

55 The MMI is used increasingly for medical, dentistry and Veterinarian Science across the English speaking world since it was pioneered at McGill University (Canada) in 2003. Evidence from the relevant literature suggests that it helps to minimise social and personality bias in the selection process, as well as reducing unfairness that results from ‘candidate-coaching’. See Razack et al. (2009) and Diwaker et al. (2008).

56 The selection of statements for response were informed by a 2009 study of MMI at McGill University. See Razack et al. 2009.
believed that MMI “effectively filters out ‘interview coaching’ as a selection factor”, but 54% did not.

The ambivalence that marks these survey data considered as a whole rather than by individual responses, means of course that they do not support the attribution suggested. However, the coincidence of innovation and data-effects remains striking. It should also be noted here, that following the introduction of MMI by the School of Dentistry in 2012 the proportion of admissions for candidates from LPN backgrounds has increased from 16.8% (16) in E2012 to 26.6% (25) in E2013.\textsuperscript{57} University data for these Schools do suggest that further research into MMI is warranted, particularly amongst successful and unsuccessful candidates.

5.1.3.1.2 Non-traditional qualifications

In most subject areas Level 3 A-level equivalent qualifications are accepted as evidence of candidate suitability. In many cases these are vocationally oriented and can be considered as ‘non-traditional’ compared to the standard A-level model of candidate assessment. Although the numbers are low in most cases making proportional analysis of little purpose, there have been increases in numbers of places offered on the basis of such qualifications in many subject areas that also sit alongside clusters of positive effects for Fair Access.

Some examples can illustrate this. In the School of Architecture for instance, a department that has seen improvements in the recruitment and retention of LPN students in recent years, numbers of places offered primarily on the basis of non-traditional qualifications rose from 5 for E2010 to 12 for E2012. In the School of Music where similar improvements in LPN recruitment and retention are evident as well as for NS-SetC 4-7 recruitment and progression, the numbers have increased from 8 for E2010 to 23 for E2012. In the Department of Computer Science, a department that has seen a marked increase in the proportion of LPN students in its undergraduate population, the numbers have increased from 5 for E2009 to 23 for E2012. The most striking example however comes from the Management School where there was an increase from 20 such places offered for E2010 to 50 for E2012. This School has seen increases in the proportion of undergraduates from LPN backgrounds over the last five years, as well improved retention of these students. Over the same period there has also been an increase in the proportion of BME students in its undergraduate student population.

The data presented above relating to the types of Level 3 qualifications accepted by subject areas may be linked to positive outcomes for WP students. However, more research is needed to identify the students in question and to ascertain whether the increases in LPN recruitment for example are directly and

\textsuperscript{57} Data accessed and verified 10 September 2014. P = 0.104
significantly connected to changes to policy. Nonetheless, the coincidences cited here suggest that further inquiry may be worthwhile.

5.1.3.2 Financial support

The nature of financial support for students who qualify under WP criteria has changed over recent years with the introduction of Access Agreements and against the backdrop of increases in standard tuition fees. Historically, the University has granted bursary support to students at risk of leaving HE due to financial difficulties. For E2012 however, following the raising of tuition fees, fee waivers were introduced whilst the standard bursary was reduced from £3K per annum to £2.2K per annum. For E2013 accommodation fee waivers were introduced. To chart the changes across the University, data has been considered going back to E2006. For the purpose of broad analysis and comment most types of financial support have been grouped together, creating aggregate trends and patterns of the proportions of students who receive financial support from the University at each organisational level.

One support element has not been included in this aggregated data: the awards (‘Standard’ and ‘Non-standard’) that were provided from the Access to Learning Fund (ALF) until E2013. These payments were normally for emergency situations of immediate need. It is simply noted here that the following schools saw increases in the numbers of Standard Award allocations: the School of Law and Social Justice (a 33% increase between E2011 (9) to E2012 (12)); the School of Histories, Languages and Cultures (a 55% increase in Standard Awards between E2011 (11) to E2012 (17)); and the School of Engineering (100% increase in Standard Awards between E2011 (6) to E2012 (12)). These numbers are too small to have had a significant impact on the trends being discussed here. They nonetheless provide some indication of how the financial challenge of sustaining a place of study is becoming greater for some students.

Across the University, there has been an increase in the proportion of students receiving financial support in the forms of cash awards and waivers: from 11% (1,283) in E2006 to 32% (3,678) in E2013. Increases in the proportions of students receiving financial support are also apparent in most subject areas. Again, the examples given have been selected for their alignment with clusters of positive data effects for particular departments.

- In the School of Dentistry the proportion of supported students has increased from 9% (35) in E2006 to 25% (103) in E2013. There have also been improvements in the retention of LPN students since E2009 as well as increases in the proportions of BME and mature students over the same period.

- In the School of Medicine the proportion has increased from 9% (120) in E2006 to 29% (389) in E2013. In Medicine there have been increases in the proportion and retention of LPN students as well as in the proportions of NS-SeC 4-7, mature, disabled and BME students.
In the School of Veterinarian Science the proportion of undergraduates receiving support has increased from 8% (37) in E2006 to 41% (249) in E2013. This school has also seen increases in the proportions of mature, disabled and BME students as well as students who are from LPN and NS-SeC 4-7 backgrounds.

The School of English has seen an increase from 17% (66) of students receiving some form of financial support in E2006 to 55% (280) in E2013. There have also been increases in the LPN applications and the proportion of LPN students on the School’s programmes. The proportion of disabled students has also increased since E2009.

In the School of Philosophy the proportion of financially supported students has increased from 19% (23) in E2006 to 68% (61) in E2013. Philosophy has also seen increases in the proportions of disabled, mature and ethnic minority students within its home undergraduate population.

The School of History has seen an increase in the proportion of supported undergraduate students from 10% (51) in E2006 to 47% (221) in E2013 along with increases in the proportions of LPN, disabled and mature students in recent years.

In the Department of Chemistry the proportion of supported students has risen from 13% (28) in E2006 to 48% (152) in E2013. In Chemistry there have also been increases in the proportions of mature and BME students as well as in the proportions of LPN applications and admissions. Chemistry is particularly important here in providing (along with the School of Electrical Engineering, Electronics and Computer Science) one of only two examples of improvements in the proportion of part-time students studying on its undergraduate programmes.

5.1.3.3 Outreach

Outreach work conducted by the University’s Educational Opportunities team is discussed in the second part of this report. Here we will consider work that is conducted primarily by academic colleagues from within the faculties. Of particular interest are those departments where types of innovation and developmental effort are apparent that also align with changes in student data profiles. Examples are given here across the three faculties of the University.

In the School of Veterinarian Science which, as has been reported, has seen increases in the proportions of students who are from LPN and NS-SeC 4-7 backgrounds, academic colleagues have developed a menu of outreach activity and media in recent years. These include:
• webinars, using Microsoft Link, enabling an efficient delivery of outreach and allowing staff to build up a repository of resources;
• outreach events such as the ‘GUTS day’ which are designed to have high impact upon pupils;
• involvement in the VetNet\(^{58}\) programme which sponsors a broad range of outreach activities.

In the School of Archaeology, Classics and Egyptology, which has seen an improvement in the proportion of LPN applications from 23.5% (147) in E2012 to 26.5% (159) in E2013\(^{59}\), colleagues have developed an outreach curriculum which tailors its objectives to the school year group. Some key components of the curriculum and its programme are given here.

• Market stalls for GCSE pupils. Students sample a day on campus, participating in various events run by the academic staff. These are intentionally broad in nature, as students are encouraged to think about the different types of courses available.

• Primary school visits. These use the resources available from the department to maximise impact on pupils. For example, artefacts from the Garstang Museum\(^{60}\) are used to create interactive games and quizzes.

• A pack of online resources has been developed which is distributed to schools as lesson activities. A follow-up visit is then arranged which is tailored to what the pupils have been learning.

• An Honours Select summer school. Students attend lectures from a variety of sub-disciplines, learning about how they can combine different modules into their programme of study. This is aimed at Go Higher\(^{61}\) students but open also to the public with the intention of attracting applications from mature students.

Another example from the School of Histories, Languages and Cultures is that of the Nuclear History Club. This initiative provides materials and activities that engage pupils in Years 12 and 13. The School of History has seen improvements in the proportions of LPN applications and admissions between E2012 and E2013.

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\(^{58}\) The National Lifelong Learning Network for Veterinary and Allied Professionals.

\(^{59}\) Data accessed and verified 10 September 2014. P. = 0.228

\(^{60}\) The Garstang Museum houses artefacts from the work of the Egyptologist John Garstang at the University of Liverpool. University museums are increasingly regarded as having great value for raising the aspirations of children and young people towards HE. Indeed, a specific commitment to maximising the potential of the University’s collections is included in the University of Liverpool Access Agreement 2015-16. P.10. See: http://universitymuseumsorganization.org/advocacy/participation/

\(^{61}\) Go Higher is a one year part-time access course leading to undergraduate programmes within HSS. It recruits mature students with few if any formal qualifications.
Within the School of Physical Sciences, academic colleagues from the departments of Physics, Chemistry and Mathematical Sciences work together closely for the purpose of school visits and outreach more generally. Staff from the School engage with a huge volume of pupils across Liverpool, the northwest of England and Wales. For illustration, between September 2013 and April 2014 staff worked with 9,905 pupils. This School has seen an improvement in LPN applications from 27.0% (634) in E2012 to 27.8% (704) in E2013\(^{62}\) as well as an increase in LPN admissions from 30.0% (178) in E2012 to 31.3% (177) in E2013.\(^{63}\) The key elements to its strategy across the different subject centres are:

- the Liverpool Physics Outreach Team comprising academics and PhD students;
- an Ogden Trust\(^{64}\) sponsored outreach post within the Physics department;
- undergraduate involvement in schools outreach;
- two school networks within which most schools are target-schools identified by the Educational Opportunities team;
- a programme of annual trips supported by the Ogden Trust e.g. to the European Organisation for Nuclear Research (CERN) in Switzerland, to the National Space Centre in Leicester etc.;
- sponsorship of events by member societies, such as the Royal Society for Chemistry;
- science and engineering foundation programmes at Carmel College leading to Year 1 entry;
- primary schools invited onto campus for their pupils to attend and participate in demonstrations in the Central Teaching Labs;
- an accredited WP module in the Department of Chemistry (Chem. 390: ‘Science Communication’) linked to a module in the School of Environmental Sciences (Env. S. 393: ‘Science Communication’);
- two Challenge Competitions (for Years 7/8 and Years 9/10) in which all schools in the northwest of England and Wales are invited to participate. (Each year around 2,000 pupils take part across 94 schools);
- master classes run in collaboration with colleagues at Liverpool Hope University and Liverpool John Moores University;
- ‘Fun Maths’ roadshows with 50 discrete activities for each;
- a programme of around 300 activities of all types organised throughout the year, including Maths Clubs, GCSE revision sessions, game-show workshops, CPD for primary school teachers;
- a Public Engagement Grant from the Engineering and Physical Sciences Research Council that supports a WP officer within Physics;

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\(^{62}\) Data accessed and verified 10 September 2014. \(P = 0.5369\)

\(^{63}\) Data accessed and verified 11 September 2014. \(P = 0.6431\)

\(^{64}\) The Ogden Trust supports the engagement of children and young people in the study of physics. See: [http://www.ogdentrust.com/](http://www.ogdentrust.com/)
• partnerships for external collaboration such as that with the Education Improvement Partnerships and University Academy at Ellesmere Port as well as with museums, zoos, etc.

Within the Centre for Lifelong Learning, the Continuing Education department has introduced innovations that are helping to improve the engagement of low-income students as well as developing progression strategies for those students. Accessibility has been enhanced with the provision of MOOC style online courses. A 60-credit Level 1 award has also been introduced that contains an independent study module that can be conducted at a workplace. This module has potential as a progression award and so also as a route onto a University undergraduate programme. Continuing Education staff are engaged extensively in outreach work. The proportion of LPN students on Continuing Education courses rose from 20% (11) for E2007 to 35% (38) for E2013.

5.1.3.4 Collaboration

In the discussion of outreach above there are examples of collaboration with outside agencies. Naturally, high quality outreach presupposes good working relationships between the University and its partners such as schools, community organisations etc. Indeed, all academic departments partner with external agencies for a wide range of purposes including for outreach. Here some examples of external collaboration that align with relevant positive data trends are described.

In the School of Psychology collaboration with the psychology department at Wirral Metropolitan College supports a BSc (Hons) Psychology (2 plus 2) degree programme. For the college-based part of the programme students complete a Foundation Year followed by Year 1 of the Honours degree programme spent mainly at the college, though with some attendance at the University. For these two years tuition fees are set at under £6K (£5,975 for E2014). Students then progress into ‘Year 2’ for two further years of study within the School to complete the Honours programme. The numbers of students on this ‘2 plus 2’ programme has doubled in recent years to 31 students for E2013. It is probable that this programme is contributing to the improved figures for LPN application and admissions. It is also likely to support the recruitment of mature students.

A similar example is provided by the Department of Chemistry where, since E2011 an apprenticeship scheme has run in collaboration with Unilever and Wirral Metropolitan College. Through this scheme young Unilever employees are allowed day-release to study at Wirral Metropolitan College for one year. This is followed by a ‘Year 2’ of study which is spread over two years on a part-time basis. A final year of study is conducted within the department on a full-time basis. This model has helped to improve the proportion of part-time undergraduate students in this subject area.

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65 Continuing Education provides an extensive range of open-enrolment non-accredited courses.
66 Massive Open Online Course.
67 Data accessed and verified 5 September 2014. P = 0.0056
A further example is provided by SE where many colleagues work with Mersey STEM. Mersey STEM is an educational provider that specialises in the engagement of pupils with subjects covered by science, technology, engineering and mathematics. Working in collaboration with universities Mersey STEM provides a very wide range of activities and engagement events for schools and colleges. Individual colleagues within the departments of Physics, Chemistry, Mathematical Sciences, Engineering, Electrical Engineering and Computer Sciences are Mersey STEM ambassadors and as such are closely involved in collaborative outreach activity. Most of these departments have also seen increases in the proportions of LPN students applying to study on their programmes as well as increases in LPN admissions.

A different type of collaboration is that between the staff of different departments within the University. Of crucial importance here are the working relationships between the Educational Opportunities team who specialise in schools liaison, engagement and outreach and staff within academic teams. One example of this is the ‘Dangerous Science’ summer school for Year 10 pupils which is run as a collaboration between Educational Opportunities and academics from the STEM subject areas. This work is coincident with a pattern of improvement of LPN applications and admissions from E2012 to E2013 across the constituent departments of SE. It also aligns with patterns of improvement in the proportions of BME students in the School of Electrical Engineering, Electronics and Computer Science, the School of Environmental Sciences and the departments of Chemistry and Mathematical Sciences. A strategically important example of improved internal collaboration, the placement of a SRAO officer with HSS, has already been referred to in this report. These sorts of internal (and embedded) collaborations are likely to improve the targeting of outreach work with schools as well as the tracking of ‘WP students’ and their needs once they arrive at the University.

5.1.3.5 Curriculum design, pedagogy and student support

Once students from WP backgrounds have achieved and taken up a place of study, their experience upon arrival and as they become engaged in study and student life, is critically important to their longer term success. This concern is broadly covered by the University’s ‘retention’ and ‘progression’ commitments. A number of themes emerged from interviews with staff that were relevant to this.

Many schools and departments provide means by which students can participate in the ‘life-of-the-subject’ beyond the formal study programme. Where such enhanced curriculums exist these are likely to contribute to a ‘sense of belonging’ that can be of great benefit to WP students. There are examples of where such opportunities also align with positive data effects for retention and progression.

In the School of Law student involvement is encouraged and supported in a number of ways. The well-established ‘Street Law’ programme for example allows undergraduate students to voluntarily take on legal projects for community organisations. The Liverpool Law Clinic also uses students to offer pro bono legal advice to members of the local
community. This gives students professional experience whilst providing free legal advice to the public. The Student Pro Bono Society enables students to gain experience in community advocacy organisations such as the Liverpool Central Citizens Advice Bureau. The Student Legal Society and Student Bar Society provide networking opportunities as well as visits to courts and chambers. Undergraduate students are involved in school visit days such as ‘Barrister Day’ aimed at pupils from state schools. Students also do presentations as part of the School’s outreach work. The School has seen its retention of Year 1 LPN students increase from 84% for E2008 to E2009 to ‘full-retention’ for E2013 to E2014.68

Encouragement for students to get involved in co-curricular activities offered within the Management School gives us another example of curriculum enhancement. The School’s participation in Enactus69 for instance provides opportunities for undergraduates to run social benefit projects in local communities. The Enactus annual programme also offers competitions to which students can submit business ideas tackling social issues. Again, these sorts of opportunities enable students from family backgrounds where there has been little if any experience of HE to become fully involved in their subject areas. The retention of Year 1 LPN students within the School has increased from 89% for E2007 to E2008 to ‘full-retention’ for E2013 to E2014.70 The progression of Year 1 students from NS-SeC 4-7 backgrounds for E2012 to E2013 was 83%, slightly behind the budget-centre average.

The theme of co-curricular student activity and participation overlaps with another crucial theme for the engagement, retention and progression of WP students: that of employability. Naturally, where students are able to contribute to the active culture of their schools and departments, they will often also through this activity develop skills and characteristics that will serve them well on the job market after they have graduated. In those subject areas for which graduation is the first step into a professional career e.g. dentistry, law etc. this has been true historically. In some subject areas that are less directly vocational however, employability is now becoming more structurally integrated and embedded into modular and curriculum design. A good example of this is found in the School of Psychology where employability is deliberately emphasised in presentations to Year 1 students at the commencement of the programme and is re-emphasised throughout the three year programme. Employability considerations are also in evidence in the School’s Year 1 ‘Professional Skills in Psychology’ module as well as in the M-level ‘Investigative and Forensic Psychology’ programme.

An area of growing interest is that of inclusive pedagogies that may benefit students who have come from backgrounds with little or no experience of HE and students facing specific challenges. There is evidence of attention being given to this sort of educational sensitivity in a number of departments. Within the School of Sociology, Social Policy and

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68 Data accessed and verified 12 September 2014. P = 0.0094
69 Previously known as Students in Free Enterprise.
70 Data accessed and verified 12 September 2014. P = 0.0065
Criminology for instance, where the retention of Year 1 LPN students improved from 87.1% for E2007 to E2008 to 96% for E2011 to E2012\(^{71}\), small teaching groups were introduced with this deliberate rationale. In this School also the potential for Critical Pedagogy approaches to assessment for humanities subjects that may be beneficial for WP students is being explored, supported by HEA funding.\(^{72}\) Another example is that of the introduction of interactive methodologies made possible by new teaching media such as Poll Everywhere which is being used in the Department of Electrical Engineering. This type of approach is likely to be helpful to students unused to formal academic teaching environments. Again in the School of Psychology, the emphasis on cross-cultural disciplinary themes, evident in its ‘International Psychology’ module for instance, sits well in a subject-area that has seen its BME home student undergraduate population rise from 6% (28) of the total in E2010 to 9% (50) in E2013.\(^{73}\)

One example of a supportive e-learning platform that may be beneficial to WP students is iLearn.\(^{74}\) iLearn provides a menu of support packages for all types of student and can be accessed by any student at the University of Liverpool. The University’s Management School has made particular use of iLearn and has embedded it within the undergraduate curriculum. A pilot-study was conducted to ascertain whether WP students were more likely to use it than other students. The diagnostic test that all iLearn users must complete using their student login identifier was used as the indicator. Analysis of E2013 diagnostic test logins revealed that: female students were more likely to have accessed iLearn (28.1% of all female students compared to 21.8% of all male students\(^{75}\)); students from NS-SeC 4-7 backgrounds were more likely to have accessed iLearn (32.3% of all NS-SeC 4-7 students compared to 22% of all NS-SeC 1-3 students\(^{76}\)); and disabled students were more likely to have accessed iLearn (31% of all disabled students compared to 23.8% of all non-disabled students\(^{77}\)). Alongside of this, it is noteworthy that the School has also seen: an improvement in Year 1 LPN student retention from 89% for E2007 to E2008 to 100% for E2012 to E2013\(^{78}\); a Year 1 NS-SeC 4-7 progression for E2012 to E2013 of 83%; and an increase in the proportion of disabled students registering for the Disabled Student Allowance during the teaching year, from 13.9% (6) in E2012 to 44.8% (26) in E2013.\(^{79}\)

\(^{71}\) Data accessed and verified 8 September 2014. \(P = 0.2454\)

\(^{72}\) This work has been supported by the HEA Social Sciences Strategic Project: Active and Experiential Learning.

\(^{73}\) Data accessed and verified 4 September. \(P = 0.0694\)

\(^{74}\) See: [http://www.ilearn.com](http://www.ilearn.com)

\(^{75}\) Data accessed and verified 12 September 2014. \(P=0.16\)

\(^{76}\) Data accessed and verified 12 September 2014. \(P=0.02\)

\(^{77}\) Data accessed and verified 11 September 2014. \(P=0.24\)

\(^{78}\) Data accessed and verified 12 September 2014. \(P = 0.0028\)

\(^{79}\) Data accessed and verified 12 September 2014. \(P = 0.001\)
5.1.3.6 Areas for future inquiry

In discussions with colleagues across schools and departments many other specific examples of WP targeted and non-targeted support were offered, all of which are likely to be of value for improving participation within those subject areas. The establishment of student learning and teaching support officers (SLATSOs) within the School of Law and Social Justice and the School of History is an example of this. Another is the introduction of the Honours Select system that will make that curriculum offer of the School of Law and Social Justice more flexible for module choices and combinations. The introduction of new disability policies in some areas is also important, for example in the School of Health Sciences where the proportion of disabled students has risen 9% (59) for E2010 to 11% (68) for E2013 and in the School of Medicine where the proportion has risen from 5% (75) in E2009 to 6% (86) to E2013. Other examples include: more interactive open days, discovery days and post-application visit days; the rolling out of peer-mentoring across subject areas; and the use of peer-assisted learning e.g. in the Department of Chemistry. All of these examples and many others not listed here warrant closer inspection in later phases of the University’s WP and Fair Access evaluation work and development.
5.2 Pilot-studies: clearing the path to the University; developing relationships

For schools-based outreach work the evaluation ‘starting point’ could not be data of the form used for applications, admissions and post-entry student support. The starting point used instead was the professional perspectives and intuitions of the staff of the Educational Opportunities team. These were used to guide inquiry in order to generate data and so insight for school-based work. A series of evaluation priorities was determined through discussions with the team. These discussions took place over the months of October 2013 to February 2014 and took the form of one-to-one interviews with individual staff, workshop style events and attendance at team meetings.

Two of the pilot studies that resulted from this process are reported here.

5.2.1 Pilot study 1: investigating the Scholars programme

The Scholars programme

The Scholars programme supports Fair Access by selecting school pupils from Partner or Associate schools according to criteria. The candidate must:

- be a Year 12 student currently studying two year, Level 3 qualifications e.g. AS levels, BTEC, etc.;
- be studying at a Partner or Associate school or college in Greater Merseyside;
- have at least 8 A* - C grades at GCSE (or equivalent e.g. GNVQ, BTEC, etc.) including English and Maths, five of which must be at grade B or above;
- be from a family with little or no experience of HE.

One further criterion must also be met. The candidate must either:

- be in receipt of or entitled to discretionary payments at school or college;
- or be in receipt of or entitled to free school meals;
- or have a household income of less than £35,000;
- or be living in or have lived in local authority care.

This Year 12 programme is academically rigorous and introduces the pupils to key concepts for teaching and learning in HE, the principles of independent study and the differences between school, FE and HE. It involves contact with academics who act as tutors for assignments set for each pupil. Each student is also supported by a graduate advocate who have themselves been to the University of Liverpool.

For the pupil who completes the programme it leads to: a guaranteed conditional offer of a place at the University of Liverpool; a 40 point UCAS concession; and a financial bursary to help towards tuition fees and living expenses.
The programme is supported by 60 academic tutors from across the three faculties of the University. Along with setting assignments for the students these tutors provide guidance and on-going support, assessment criteria, a marking matrix and a verification and moderation process to ensure authenticity and rigour.

The Scholars programme has grown significantly in scale and achievement since its introduction in 2007. The numbers of students going through the programme have increased year-on-year as have the numbers of students completing it, receiving offers and converting to entry for an undergraduate course at the University.

The programme directly supports the University’s work towards E20014 Access Agreement target 5a.1 (increasing the numbers of Liverpool Scholars progressing to HE) and indirectly supports target 5a.5 (recruitment from state schools), target 5a.6 (recruitment from LPN backgrounds), target 5a.7 (recruitment from NS-SeC 4-7 backgrounds), target 5a.8 (admissions from NS-SeC 4-7 across subject centres) and target 5b.8 (applications from Partner and Associate schools).

Inquiry priorities for this pilot study included the following:

1. what is the importance of the relationship with the University to the Scholars student?
2. which stages of the programme were most important to the Scholars student?
3. what is the importance of the information that the programme provides to Scholars student e.g. for the UCAS process, student life etc.?
4. what is the importance of the academic content to the Scholars student?
5. what personal outcomes has involvement on the programme produced e.g. motivation, academic confidence, etc.
Methodology

The process supporting the design of the Scholars survey to test what works’ for these pupils was structured in a series of stages.

Stage 1: Scholars analysis

An evaluation working group with Scholars staff identified some possible effective design features, representing ‘moments’ that were motivating and engaging for these pupils at the following points:

- initial acceptance onto the programme;
- pre-Christmas registration;
- the issuing of the University of Liverpool i.d. card;
- welcome days with ex-Scholars students;
- receiving the academic assignment;
- tutors’ feedback.

These were used to inform questions for the survey of newly arrived students from the 2011/2013 Scholars cohort.

Stage 2: survey design

The survey was drafted and the final design produced with the help of the market research team in SRAO.

Stage 3: release of the survey (1 – 13 November 2013)

Target group: 41/ Returns 24 [58%]

Stage 4: interpretation by discussion with Scholars team

Findings

The broad area of support that students rated most frequently as having been important was that Scholars had helped them to understand what would be expected of them as students at the University of Liverpool (83% ‘very’: 91% ‘very’ or ‘somewhat’). The ways in which Scholars helped to create a sense of having a relationship with the University was also cited as having been important by a majority of respondents (62% ‘very’: 87% ‘very’ or ‘somewhat’).

When asked which stages of the Scholars process were most important in final decisions to apply for and accept a place, the two clearly academic stages were highlighted most
frequently. Most frequently rated as important were: ‘academic skills days’ (70% ‘very’; 96% ‘very’ or ‘somewhat’); and ‘academic assignment and tutorial sessions’ (70% ‘very’; and 92% ‘very’ or ‘somewhat’). Also frequently rated as important was ‘help with the UCAS application process’ (67% ‘very’; and 92% ‘very’ or ‘somewhat’). Other less obviously academic aspects of Scholars (the interview session, welcome days, etc.) were cited as having been important for final decisions by far smaller proportions of respondents.

When asked to rank which aspects of the support provided by Scholars made the most difference to actually obtaining a place, high rankings were most frequently given to the reduction of the UCAS points requirement for entry (43% at 1; 58%, 1, 2 or 3). Help with the UCAS process, whilst usually not given the highest ranking, was nonetheless also frequently ranked highly (50% at 1, 2, or 3). Other factors that were frequently given high rankings were help to improve academic skills (70% at 1, 2 or 3) and relatedly, help in improving the ability to meet deadlines (41% at 1, 2 or 3). Aspects of the support in the areas of the social and practical aspects of university life were indicated the most frequently as having made the least difference e.g. helping prepare for the social aspects of being a student (79% at 7, 8 or 9).

Discussion

The Scholars survey asked participants to reflect upon how they felt at the different stages of the Scholars ‘journey’. These elaborated comments provided insights into why Scholars had worked for these students.

A strong recurring theme was that of motivation in both personal and academic terms. Simply being accepted onto Scholars meant for some a huge boost to their determination to succeed academically and to obtain a place at university.

This motivated me to want to go to university, particularly for the course which I wanted to do.

I felt so proud of myself, I didn't know if I was academically up to the challenge of university because I had no idea what to expect. When I found out I had been accepted on the programme I felt that if the Scholars team thought I was up to the challenge then I must be.

Getting this letter was brilliant, and made me work so much harder to make sure I got in.

Along with the personal validation felt by many of the students after they had been accepted, there was also the growing sense of what they would need to achieve to secure a place and what would be expected of them as students at the University of
Liverpool. Considering this latter point, the students’ encounters with the graduate advocates were also important.

[I became] Motivated to work harder because I knew what I had to achieve

I was a little apprehensive about it, but it introduced me to the standard required of first years, preparing me on what to expect when actually going to university. It also motivated me in my school work, encouraging me to study so that I got the results to get to university.

I felt inspired and motivated as I knew I could achieve what they [the graduate advocate] have achieved.

[Working with undergraduates] was the best part because I met real students who actually were the people who made me decide I want to go to university. [NAME] the graduate advocate told me what it was like and how she went through the process. I still remember it to this day.

At each stage of the programme students reported feeling excited at their growing sense that entering HE was something to which they might realistically aspire. As they increasingly realised this possibility as well as their own potential, many also described the excitement they felt at certain key moments. Registering onto the programme after being accepted and receiving their student identification card for example were examples of such moments of excitement.

[I now felt] Slightly more exited; it felt like going to university seemed more of a reality.

I felt really excited, inspired and motivated to be given the opportunity to go to university and take part in such a great path to University.

I was excited and really felt like a student because I had access to everything any other students at the University had.

Students also reported becoming more confident about their own academic abilities as they tackled academic assignments, in the process developing academic skills for researching and writing assignments, using online and library resources, meeting deadlines and so on.

It was encouraging to get positive feedback from my academic advisor, giving me confidence in my studies and suitability for university.

[Doing the assignment] Definitely helped with referencing assignments now, as most other students are struggling.
Getting the assignment back was Very helpful, especially regarding referencing and appropriateness of what to include in an academic assignment.

As the students progressed through the Scholars programme many of them saw themselves increasingly as a part of the life the University, even before having obtained their place. As they interacted with graduate advocates, with other Scholars students and with academics many, on their own testimony, gained a sense of already being attached to the University and as being engaged with a process that, assuming they remained on track through their own personal and academic effort, would lead to a place of study in their chosen subject area. This growth of personal and academic confidence provided the basis also for an increasing identification with the University as they accessed campus resources using their personal University card and rose to the challenge of assignments set by academics. This identification with the University appears also to have helped these students to identify themselves as students in higher education.

Being given my formal assignment helped me feel like a university student which I believe is a really good aspect of this programme as I felt less alien to the life of university when I actually started it as a proper undergraduate student.

It made me feel proud and like a real undergraduate student.

It was useful to be able to access the University's libraries and resources.

Working with undergraduates helped me feel welcomed and accepted as a student by other students, which certainly encouraged me to pick Liverpool as my first choice.

Getting my University i.d. card granted me access to the libraries which was very useful as it allowed me to get used to the layouts of the buildings and the systems they [students] used.

As the student became fully engaged with the programme their knowledge of the ‘world of university’ also improved. This was facilitated by the developing interactions with staff and resources such as the University library service, in the process deepening the individual’s sense of acceptance and growing conviction that they had what it takes to succeed as an undergraduate. The following quotations illustrate this aspect of the Scholars programme.

Getting my University i.d. card made me feel like a real part of the university; it also made the programme seem more real to me and that I was going to end up studying there as an undergraduate.
I felt as if I really belonged and was really wanted by the University.

I was extremely excited as I could now use the library which for me was the biggest help and was the most important thing.

I felt like I was already accepted as a student at the university.

I felt like part of the University even though I wasn't a proper student, it made me feel welcome and accepted.

[I felt] Excited and felt like I was a part of a university already.

Working with undergraduates was brilliant because I got the chance to ask them first-hand what university life was like. I was worried there was a "type" of person that goes to university and when I met people that were like me it was comforting to know I wouldn't feel out of place.

Finally, the Scholars graduation stage had been particularly memorable for these students. In nearly every case they described feelings of great achievement and pride that sealed their decisions to strive for entry to the University of Liverpool and their self-belief in their ability to succeed in doing so.

[At] graduation - I felt I had really accomplished something and it gave me the drive to aim for graduation at the end of my studies.

The graduation ceremony made me feel proud of myself and made me feel as if I had really achieved something.

The graduation event was memorable. At the time I felt so proud of myself. My family came to support me and it also made them realise that I was going to university and they supported me a lot more during my exams and while I was doing my A levels after that. They were so proud of me and I felt as though all the hard work I had been putting in during my time in college was paying off.

Generalising from how students responded and considering what they have said from a different perspective, we can discern an underlying structure to the Scholars process. This structure can be described as a ‘web-of-relationships’ around the student, supporting the transition from school-student to future university undergraduate.
Initial ‘aspirationally formative’ relationships will have been those with the class-teachers and Heads of Year who recognise the student’s abilities and select them for Scholars as well as, in some cases, parents or carers. On meeting University staff however, a new dynamic begins in which through acceptance on the programme, registration and receipt of their University i.d. card, the student begins to understand the reality of the opportunity they are being presented with. By steps, through new types of relationship, particularly with Educational Opportunities staff, undergraduates who are themselves ex-Scholars students and academic tutors they come increasingly to identify with the University as a place in which they belong. These supportive relationships contribute to a process of change in the individual that leads not only to a ‘sense-of-belonging’ expressed by a number of survey participants, but also to a different sense-of-self. It is this web-of-relationships that guides the student to the point where their place on a programme of study is secured, assuming of course that they perform well enough academically and that this next life-step is indeed what they wish for themselves. It is also the reason that the University has now committed to a ‘managed and sustainable increase’ in the numbers recruited to Scholars.\(^{80}\)

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5.2.2 Pilot study 2: exploring the ‘Relationships Model’

The ‘Relationships Model’

The ‘Relationships Model’ that defines the University’s links with schools has the following characteristics: regular communication from a designated school-liaison officer based within the Educational Opportunities team; frequent advertising of University-wide activities and opportunities for schools; rapid response to requests for Educational Opportunities activities from schools (usually within 24 hours); the provision of bespoke types of support, tailoring activities to school priorities and needs where possible; responding positively to requests for new activities or support; brokering working relationships between schools and colleagues based within faculties and professional services teams; regular feeding back and reporting from programmes and specific projects.

Schools wishing to partner with the University must meet certain requirements. These are: signing an annual service level agreement; committing to having senior management engagement in the relationship (usually Assistant Heads); providing an operational day-to-day contact for programmes and the coordination of activities; agreement to sharing data with the University e.g. progression to HE data; commitment to participation in as many of the offered Access Agreement activities as possible.

The Educational Opportunities team deliver their activities and project work from mid-October through to mid-July. However, most bespoke requests from schools come in the spring. Schools are often most keen on activities that involve staff and University students going out to the school to do subject-based or personal, social and health education (PSHE) activities. These types of activity are relatively non-disruptive for the school, involving less staff-cover. The schools are also quick to take up opportunities for subject-based activities, with the team often receiving many email responses on the same day that the activity is advertised.

Methodology

The following inquiry priorities were identified for this pilot-study:

- changes to school culture;
- pupil attainment and aspiration;
- how the schools value their relationships with the University.

With further discussion a survey was designed to explore these evaluation priorities and to better understand the University’s relationships with its Partner and Associate schools.81

81 See Appendix II for a list of the University’s Partner and Associate schools by IMD and free school meals criteria.
The survey was structured with prompt-statements that required rated responses from participants. It was organised into the following sections:

- the practical aspects of the University-school partnerships (seeking assessments of the quality of design and delivery);
- the uses that schools make of the activities provided (seeking a fuller understanding of how the relationship works within the school);
- the wider aspects of the University-school relationships (seeking to capture any ‘whole-school’ effects.)

The survey was sent to 27 education professionals in the University’s Partner and Associate schools. Between them, these intended respondents represented 23 schools that have well-established working relationships with the University. Eighteen of these school professionals participated in the survey. The survey ran from 2 May to 14 May, 2014.

Findings

The survey data showed that most schools do acknowledge the ‘relationships’ aspects of their partnerships with the University and also appreciate the benefits they bring. The great majority of respondents for example agree that the staff of the University’s Educational Opportunities team are accessible and that they can be contacted directly when needed (agree, 94%; strongly agree, 82%).

*They always respond swiftly to e-mails or queries.*

*The University of Liverpool Educational Opportunities team is very accessible, and very flexible. The team work well together, and have been very accommodating with school requests.*

The same proportions agreed that the staff were responsive to the needs of their school for the purpose of engaging their pupils with what the University has to offer. In part, this was drawn from an appreciation of the commitment of the staff and the ways in which they make themselves amenable to school requests.

*The staff do their very utmost to provide anything we ask for from resources to arranging specific activities to meet our needs.*

The attention the team pays to the characteristics of each school was also confirmed by the majority (94%) of respondents who agreed that the activities provided were well-tailored for their pupils.
The team offers a programme of activities for different pupils in different year groups, as they make their educational journey through school. The team is also very responsive to requests from the school, and look to set up bespoke activities. They also highlight offers from the student Guild, as well as academic departments.

Respondents tended in the main to give strong endorsement to the standards of organisation and overall quality of the design and delivery of the engagement sessions. Most (94%) agreed for example, that the activities provided are ‘always of high quality’. Related to this, these school professionals also tended to report that they found the activities ‘easy to engage with’.

Activities are of a high quality and very well coordinated e.g. the whole of Year 7 visited the University as part of British Science week in March.

We have a very strong partnership and activities are well organised; we are always given adequate notice (avoiding exams, school holidays and linking to curriculum needs) making it easier for us to engage.

From the responses of these survey participants it does appear that schools make use of their engagements with the University beyond the immediate activities provided and some time after they were delivered. More specifically, this broke down as follows: the large majority (82%) said that the school’s engagements were referred to in the school newsletter; and most (76%) reported referring to these on the school website. However, fewer reported other types of use that might interact with pupils more purposefully. Less than half (47%) reported ‘follow-on work in the classroom’; and few (23%) reported feeding back from the activities to pupils. Also, few (23%) said that parents received feedback from their school’s engagements with the University.

The final part of the survey asked respondents to comment upon any wider aspects of their partnerships with the University. Considering assessments of staff motivation in the opinion of these respondents, a clear difference was apparent in the data. School managers and classroom teachers were most frequently reported as finding the interactions with the University professionally motivating: school managers by 69%; classroom teachers by 87.5%. Other occupational groups were assessed as being professionally motivated by engagement with the University by fewer respondents: learning mentors by 37.5%; classroom assistants by 25%; and non-teaching staff by 25%.

One area of strong positive assessment was that of the longer-term academic benefits for schools. The majority (94%) of respondents agreed that involvements with the University had enhanced the academic reputation of the school (with more than half agreeing strongly). One respondent specifically linked this to success with the Scholars programme.
Success stories with Scholars students in the past have helped with 6th form students.

Most (93%) of respondents also agreed that their partnership is enhancing for the academic ethos of the school.

Getting the key messages over to pupils about the need to perform well and try to reach their potential has been important, especially with the STEM agenda in the school.

Finally, one area that elicited fewer positive responses was that of relating to the wider academic profile of schools in professional forums and networks. Only 56% agreed that their partnership with the University enabled their staff to participate in professional networks beyond their school; within that figure only 25% of the total ‘strongly agreed’.

Discussion

The ‘Relationships Model’ through which the University’s Educational Opportunities team work with schools is distinctive in that close attention is paid to the particular needs of Partner and Associate schools. The team members are well known to the key professionals within each school, and maintain relationships of frequent contact and high-quality communications. From the responses and testimonies of the respondents to this survey, this does seem to be appreciated within the schools themselves. The staff of the Educational Opportunities team are evidently held in high regard for their responsiveness and professionalism. The activities they deliver are seen as being well-tailored to the specific needs of the schools. They are also seen as having an influence that continues over time and beyond particular sessions with the pupils.

Areas for possible development are also suggested by these data. For instance, whilst school engagements with the University are highlighted in newsletters and on websites in many cases, feedback to pupils and their parents does not happen in most of the schools represented within this survey. It is also interesting that these assessments suggest that within most of these schools, whereas managers and classroom teachers may find their engagements with the University professionally motivating, learning mentors, classroom assistants and non-teachings staff do not. It may be that these staff are simply not involved in the relevant activities. Alternatively, it may be that they do not identify work with the University as being a part of their roles. However, positive messages regarding access to HE can come from all sections of the school community. Where the involvement of wider layers of staff in WP efforts can be achieved, this may further improve outcomes for pupils. Finally, relatively few survey participants reported that staff were able to play a greater role in professional educational forums beyond their school as a result of their Partner or Associate school status. Contrasting this with the more frequently positive assessments of academic ethos and reputation, it may be that this is an unexplored area of potential development.
6. Discussion and interpretations

Over and above reporting findings, the aim of this report has been to model an approach to evaluating WP and Fair Access that can work for a complex agenda and at different organisational scales. The findings themselves support claims at different degrees of confidence depending upon the availability and alignment of different types of data and the depth of evaluation achieved for each area of focus. The combination of data survey, professional testimony and pilot-study research has produced specific insights in some areas of programme delivery and a more general ‘positioning’ of the University’s evaluation work for further inquiry in others.

What is beyond dispute is that the student body of the University of Liverpool is changing. The types of change vary across faculties, schools and departments but in each case there is evidence of some level of forward development for many of the disadvantaged groups specified in the University’s Access Agreement commitments. Any suggestion that these changes can be simply explained by the social demographics of the City of Liverpool itself is highly implausible given that they have occurred within a relatively few years. Comparison of LPN data between the University of Liverpool and its English Russell Group comparators also suggests that these changes cannot be reduced to sector trends alone. A more complicated situation appears to prevail in which a University of Liverpool local effect is at work. It is this local effect that has been the topic of inquiry for this evaluation report.

Of course, the term ‘local effect’ is itself simplifying. In reality any specific improvement within the University will normally be the result of an amalgam of causal factors that operate or have operated historically at University, faculty, school, departmental, programme and/or professional service team levels. The inquiry has had to acknowledge these composite effects, whilst working towards plausible attributions.

These caveats put, the data unearthed by this ‘first phase’ of evaluation inquiry suggests a narrative of effective institutional effort and professional commitment towards achieving a fairer University of Liverpool. Of course, this inquiry has been ‘appreciative’: the emphasis has been upon what can be learnt from what seems to be working, in order to then consider how insights can be transferred to different parts of the University. The challenges that remain will be addressed in later phases of evaluation. Nonetheless, the full range of ‘positive data effects’ and insight garnered from professional testimony tells us a great deal, albeit at varying strengths of attribution.

Broadly, the evaluation findings can be organised into two overarching conceptual themes. Firstly, there is what will be termed the ‘Inclusive Department’. Secondly, there is the role of the ‘Relationships Model’ for WP and Fair Access.

For the first of these, the Inclusive Department, it is important to be clear that this is no particular department. Examples of inclusivity have come from all faculties and from many departments. Rather, the intention is to respond to a rhetorical question: ‘where a
department is inclusive towards disadvantaged groups of students, what might we expect to find there on the strength of the evidence we have seen so far?’ Our answer would cover a number of areas.

Evidence from the English HE sector supports a practitioner focus upon inclusive pedagogies for WP and Fair Access efforts (Lillis and Scott, 2008; Hockings et al., 2008; Hockings, 2010; Singh, 2011; Thomas, 2012). Unsurprisingly then, in those departments where the retention of students from disadvantaged groups has improved we do also tend to see practical steps having been taken or being taken towards more inclusive strategies for teaching and learning. The introduction of small teaching groups for instance, the embedding of WP elements into modular design, the introduction of SLATSOs in specific subject areas and the trialling of e-platforms such as iLearn all provided examples of alignment with improvements in retention percentages. In the case of iLearn, it was also significant that specific groups such as disabled students and students from NS-SeC 4-7 backgrounds were more likely than others to access it, evidencing some linkage with these positive effects.

Inclusive pedagogy and the sensitising of teaching and learning practice to improve the retention of under-represented student groups, have received attention in policy research and development. Indeed, ‘curriculum design’ and ‘innovative pedagogies’ are thematic priorities for the HEA\(^{82}\), these ‘work-streams’ being also supported by recent research. A key finding highlighted in the What works? Student retention and success programme (Thomas, 2012:13-18) for instance, was the importance of engagement in the academic sphere for retention. Further examples of this are a concern with achieving a better fit of pedagogical approaches and styles with the needs of disadvantaged groups, and the significant emphasis currently being put upon the provision of flexible models of learning (McLinden, 2013; Stanistreet, 2014). ‘Flexibility’ in relation particularly to concerns around the falls in part-time and mature student recruitment\(^{83}\) is normally defined in broad terms to cover forms of e-learning and blended learning, teaching timetables and aspects of engagement with employers. It also includes flexibility of module choices and combinations, making the Honours Select system that has been introduced within HSS relevant here.

Of course, all subject areas are involved in outreach. Indeed the levels of engagement with schools in terms of the numbers of ‘pupils worked with’ are very high in some instances. However, where there is evidence of attention having been paid to targeting for WP and Fair Access, improvements in applications and admissions of WP students (especially those from LPN backgrounds) were also in evidence. This was particularly true where academic colleagues involved in schools outreach had worked closely with the Educational Opportunities team. Indeed it is important to note that the provision of high quality outreach work is a clear and often repeated priority concern for government

\(^{82}\) https://www.heacademy.ac.uk/workstreams-research/workstreams

education agencies. In a recent DfE survey of schools for instance, positive mention was made of the proactive work of Russell Group Universities in initiating links with schools.  

Another design feature of outreach work that has coincided with increases in applications and admissions for LPN students especially, has been the involvement of undergraduate students in school visits and campus-based activities for school pupils. Engagement with specialist outside agencies for the purposes of subject-engagement and outreach was also linked with improvements in application rates and admissions by under-represented groups. This finding suggests that the University is becoming well positioned for the opportunities offered by the roll-out of outreach collaborative networks.

In a small number of departments serious attention has been given to how all students are selected for undergraduate programmes in ways that support WP and Fair Access considerations. In the School of Veterinarian Science MMI has been introduced as an alternative to the traditional interview format. As we have seen the coincidence of the historical introduction of MMI and improvements on a number of WP and Fair Access measures is pronounced. Although staff involved in the MMI process are divided in their assessments of it, the correlation between its introduction and the cluster of positive effects found in the School does suggest that it is contributing to a changing student demographic profile there.

The use of qualifications other than A-levels also aligns with positive effects for Access Agreement cohorts in some departments. This is important given the concerns that exist around the under-use of vocational qualifications for entry into HE (Alison et al., 2010; UVAC, 2010). In the data used for this evaluation, the clearest example of a link between the use of non-traditional qualifications and improvements in the recruitment of Access Agreement target cohorts was that of the Liverpool Management School. Where undergraduate courses are directly linked to foundation and access routes for students that begin in colleges of further education and progress onto undergraduate programmes these were also coincident with improvements in the LPN and mature student recruitment: a good example of this being the ‘2 plus 2’ programme by which students come onto the undergraduate programme of the School of Psychology. The Department of Chemistry also provided the example of an arrangement with a major employer and a college of further education that has led to an improvement in the recruitment of part-time students. These examples complement a national trend. Although there are significant sector-wide reductions in the recruitment of part-time students and mature students into HE, the single exception seems to be for mature students progressing from Access routes onto HE Diploma courses. This is particularly important for subjects allied to medicine (including nursing) given that the large majority

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85 In June 2014 HEFCE announced at £25 million allocation for the establishment of regional collaborative outreach networks.
of mature students on Access courses leading to HE are working towards undergraduate courses in those areas.  

Forms of direct support for students are also an important element within the clusters of positive effects that were identified in the study. Where increases in the admissions and retention of Access Agreement cohorts were apparent, there also were increases in the proportions of students accessing some type of financial support, whether in the form of direct awards or tuition and accommodation fee waivers. Increases in the proportions of students in receipt of financial support can of course be seen as both one explanation for improvements in recruitment, retention and success and a result of such improvements as the proportions of target students increase. Nonetheless, its appearance alongside positive WP and Fair Access data effects does seem to indicate that it contributes to more inclusive cultures within some departments. The importance of direct support in the form of bursaries and waivers for students from disadvantaged social backgrounds and from vocational qualifications routes into HE, requires further evidencing with more specifically focused evaluation. The evidence in this report comes only from the University’s Applicant Survey and data alignment analysis.

There is debate around direct financial support within the UK HE sector. Research commissioned by OFFA to ascertain the effects of bursary provision revealed that students from low-income backgrounds did not choose Universities with higher bursary offers more than those from better-off backgrounds (Corver, 2010:2). However, this research focussed upon the acceptance of offers, rather than other measures such as retention and completion rates. Furthermore, the acceptance of offers involves calculations of ‘safety choice’ and expectations of exam-success; and each of these are affected by social class. Other research has shown that fear of debt is a stronger factor in decisions about institutions for students from low-income backgrounds than those from higher-income backgrounds (Callender and Jackson, 2008; Lawton and Moore 2011; Allen and Prendergast 2009; Atherton, McNeill and Okonkwo, 2010). For the University of Liverpool, the tentative evidence presented here does suggest that there may be some causative correlation between financial support and improvements in retention and progression for some groups and that this is therefore an area worth exploring more purposefully. It is a concern now that the scrapping of the National Scholarship Programme, the government contribution to direct financial support for undergraduates, from E2015 may significantly reduce or even eliminate this effect.

Support for disabled students also appears to be producing improvements in the University’s data-performance. Against the background of increases in the numbers of disabled students entering HE following the introduction of the Equality Act (2010) (Fuller

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88 The National Scholarship Programme was reduced from £150 million for E2013 to £50 million for E2014 and will be abolished entirely for undergraduates in E2015.
et al., 2008), there has been a substantial increase in the work of the DST.\textsuperscript{89} We have also seen the improving picture for the University compared to other Russell Group universities with respect to the proportions of students who are accessing the DSA, as well as the improvements in the retention of disabled students in some departments. Nonetheless, changes to the DSA in E2016, with for example standard support for assisted learning technology being removed, do pose significant challenges to the University if these improvements are to be maintained and strengthened.\textsuperscript{90} In part at least, meeting this challenge is likely to entail mainstreaming specific types of support.

Beyond the areas of pedagogy, direct support and access routes that offer direct help to WP and Fair Access students, other aspects of inclusivity were associated with positive data effects. For example, where opportunities for students to become involved in what we might term the ‘life-of-the-department’ existed, these were often linked to steady improvements in the retention of LPN and NS-SeC 4-7 students. Such opportunities included community volunteer work, involvement in outreach, subject-linked student societies and so on. Research has shown that relatively socially advantaged students at high-tariff institutions are more likely to take part in co-curricular activities and volunteering of various kinds (Stuart et al. 2008). Mature students are less likely than younger students to involve themselves in co-curricular activities (Redmond, 2006). Here some correction should be made for practical life-realities for many types of disadvantage. So, once a wider understanding that includes caring responsibilities, part-time work etc. is applied, then a different and more inclusive picture of what we understand as ‘the active student’ begins to emerge (Holdsworth and Quinn (2010). Nonetheless, where a department offers an enhanced curriculum of co-curricular activity, so supporting a ‘sense-of-belonging’ for the student, there does appear to be some positive effect for the retention of disadvantaged groups. This is also likely to be helpful for subject-related employability considerations. The provision of ‘My Liverpool’, an extra-curricular opportunities web-site portal, may also strengthen this element of the University’s offer.\textsuperscript{91}

Those departments that could evidence an emphasis on employability for all of their students at induction, within specific modules, in curriculum design and in workplacements had also seen improvements in their retention figures for Access Agreement cohorts; particularly for LPN and NS-SeC 4-7 students. This finding resonates with examples from across the HE sector that provide evidence of the value of embedding employability concerns within academic curriculums (Williams, 2007; Pegg and Carr, 2008).

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\textsuperscript{89} The Association of Graduate Careers Advisory Services (AGCAS) has reported that the number of self-declared disabled graduates increased by 86.6\% over the last 10 years. Within this the largest increase has been of graduates reporting mental-health problems: 678.6\% between 2002 and 2012. (Tunnah and Leacy, 2013).

\textsuperscript{90} Changes to DSA were laid out in the announcement by the Minister for Universities and Science, David Willets, on 7 April 2014: \url{https://www.gov.uk/government/speeches/higher-education-student-support-changes-to-disabled-students-allowances-dsa}

\textsuperscript{91} This is a commitment made in the University of Liverpool Access Agreement 2015-16. P.9.
(rather than leaving them to be dealt with by careers service officers alone. Indeed, a case can be made here for a triangulated approach similar to that suggested for outreach work, based upon improved articulations between careers specialists and academic colleagues. It is relevant here also that the University’s Careers and Employability Service is currently providing internships supported by the Liverpool Award Fund that can be tailored to specific areas of University work.

Where academic colleagues offered subject-linked engagement opportunities that were outward and public facing, working for instance with Partner and Associate schools, these often aligned with improvements in rates of application and admissions from WP and Fair Access groups of pupils. Other examples of inclusivity came from the design of post-application visit days and discovery days. Where these were organised interactively this was reported as being supportive to students and their parents and carers since it allowed them to ask questions individually rather than in front of many other people. This type of sensitivity, demonstrating an awareness of the role that informal spaces can play for students and their family members to learn more about student life, is important for the University’s efforts to improve its offer in the area of information, advice and guidance.\footnote{University of Liverpool Access Agreement 2015-16. P.18.}

The factors listed here did not all occur together in any single department. Rather, they were found in various combinations or sometimes as a single example of inclusivity within a particular department. In all cases however, they were found in association with improvements on one or more WP and Fair Access measures. When considered together they can be regarded as a register of the types of effort and professional sensitivity that conspire positively towards an inclusive culture within any given subject-area. In some cases they will have a direct causal effect; where so, this would require focused case-study research to identify the reasons and ways that a specific student group has benefited from a specific type of support. Here for many of examples presented, we can identify possible explanations, helped by the informed opinions of professional colleagues. In other cases, these factors will be indicative of a supportive and inclusive departmental ethos that pervades the subject area, so having positive effects that, whilst difficult to isolate and measure, are nonetheless quite real. In all cases however, we can say that these are the kinds of cultural characteristics that we would expect to find in the Inclusive Department.

On the basis of the surveys conducted for this evaluation, we can say with some confidence that the outreach work of the Educational Opportunities team is highly regarded within the University’s Partner and Associate schools. A range of design characteristics and types of professional ethos were linked by research participants with positive outcomes for pupils. In different ways these reflected the careful management of University relationships whether with schools or more directly with individual pupils in later school years.
Often, the positive programme effects described by research participants were the result not simply of the work of the team with the pupils through specific activities, but rather of a combination of organisational elements comprising the Educational Opportunities team, the University in its wider aspects and the ‘whole school’. So, the effects on pupil aspirations towards HE as well as motivations for learning were described as being the result of engagement with school staff at many levels and over time, rather than appearing as an immediate result of a particular activity.\(^{93}\) This means that activities can become a ‘point-of-reference’ used by school staff sometime afterwards. The point here is that the reinforcement that this makes possible could not happen without the school staff being actively engaged with raising awareness of HE. Moreover, where the work of the team was reported via newsletters, websites, announcements and so on, this added to the sense of the programmes being a part of the life-of-the-school. Recall of previous contact with Educational Opportunities programmes in the early school years was also important in rekindling the idea of accessing HE for some pupils. The E2013 Applicant Survey for example, revealed that some applicants remembered contact with university staff who visited their primary schools. This theme of ‘recall’ is crucial for evaluation and is important to capture if genuine learning is to be evidenced following specific activities.\(^{94}\) Considering all of these factors together, we begin to arrive at a picture of how the relationship between the University and the whole school is crucial to the effectiveness of programmes intended to raise educational and social aspirations.

Whilst the role of the ‘whole-school’ in the University’s outreach work is important in reinforcing positive message to pupils about accessing HE, so too is the involvement of the University at multiple levels. Indeed ‘internal collaboration’ has been highlighted as a priority in a joint report by the Higher Education Academy (HEA) and the Leadership Foundation for Higher Education (HEA 2014). That report discusses and exemplifies the importance of improving collaboration between academic and professional services staff for a range of functions related to ‘student experience’. For this evaluation, the responses of recently arrived Scholars students provided some illustrations of this theme. We have seen that contact with academics had been a significant catalyst for these students in Year 12. So, also was the University i.d. card and access to the University’s sports facilities and library service. For these students, as well as a ‘whole-school’ effect, there was also a ‘whole-University’ effect as they shifted in their self-perceptions and their relationship to the University as an institution. The ‘web-of-relationships’ that this built around the student represented a route they could navigate from school onto an undergraduate programme of their choice, developing by stages a sense-of-belonging at the University of Liverpool. Furthermore, that process was also one of changing learner

\(^{93}\) The role of committed individuals within schools in maintaining and developing successful school partnerships has been highlighted in recent research supported by the DfE. See DfE, 2014, School and College-level Strategies to Raise Aspirations of High-achieving Disadvantaged Pupils to Pursue Higher Education Investigation. Research Brief. January 2014. P4.

\(^{94}\) An evaluation framework that would fit well for this purpose is the Kirkpatrick learning framework that is promoted for HE in part 4 of the HEFCE evaluation toolkit: https://www.heacademy.ac.uk/sites/default/files/resources/Evaluation%20toolkit.pdf
identity as the young person increasingly came to see themselves as already being a student of, though not yet at, the University of Liverpool.

The findings of the Scholars pilot-study complement evidence from other research. In the analysis of the findings of the HEA ‘What Works’ project for instance, Thomas (2012: 8) put a strong emphasis upon a range of pre-entry and induction activities that helped to “develop peer networks and friendships, create links with academic members of staff, provide key information, shape realistic expectations, improve academic skills, develop students’ confidence, demonstrate future relevance and nurture belonging”. The findings from that research also highlighted the importance of support at this stage having a clear academic purpose, so “facilitating students to build social relationships with current and new students and members of staff” (Thomas, 2012: 17).

The examples of how relationships at different organisational levels drive the programmes run by the Educational Opportunities team, making possible and reinforcing their effects on pupil aspirations toward HE, are all aspects of the team’s fundamental approach. Through the Relationships Model the team ensure high quality communications with their Partner and Associate schools, responsiveness to school requests and close attention to their needs in the form of tailored programme design and bespoke activities. The survey focussing upon this model evidenced the high value that the schools themselves place upon this way of working. What emerges from the surveys with schools and pupils is that high quality, sustained and carefully managed relationships are crucial if University outreach activities are to realise their full potential and maximise their impact upon the thinking and future behaviours of school pupils. This is further validated by research that has found high quality relationships with schools to be vitally important for effective outreach (Passy et al. 2009; Mitchell et al., 2010).

In modelling its schools outreach work an ‘open-market’ orientation of designing and providing generic activities and programmes could have been adopted. Under that model schools could access, and perhaps buy, discrete activities on a non-sustained basis and with little or no sustained involvement with the University. However, as a recent Aimhigher Research and Consultancy Network literature review concluded:

*Higher education providers should encourage schools and colleges to develop ongoing collaborative arrangements and partnership strategies rather than merely seeing links with higher education providers as ‘one-off’. (Moore, J., et al. 2013: 135)*

Rather than the ‘one-off activity’ model, as we have seen the team has concentrated on working intensively and through service level agreements with its target schools. In this way enduring relationships based upon high levels of confidence and trust regarding the quality of what the team offers, as well as long-term mutual benefits, have been achieved. Our second key thematic finding then is that of the importance of the Relationships Model – understood both in the organisational sense of the term and in its more individual sense in the later school years - in the delivery of high quality WP and
Fair Access outreach programmes that have real effect with school pupils from disadvantaged social groups.
7. Conclusion

Along with the thematic findings for policy and practice already described, this report has modelled a feasible approach to evaluating WP and Fair Access that can work at the University of Liverpool and possibly for other universities in the UK HE sector. Attention has been paid particularly to operational practicality and strategic positioning with further phases of evaluation in mind. The result is the shedding of some light upon how work and programme design may be linked to changes in the University’s data performance, where before there was none. The field of provisional insight offered in this report can now inform discussions around which areas of the University’s efforts would repay closer evaluation scrutiny for professional learning and organisational improvement.

For this model to be transferable, it would have to be scaled and adapted for specific areas and topics of focus and for different professional contexts. Its strength however lies in its ‘realism’ in navigating a course between two types of evaluation circumstance. At one end of that spectrum lie high-confidence claims made possible by experimental approaches in easy-to-control and clearly boundaried evaluation situations. At the other, are approaches that exclusively privilege stakeholder perspectives to the exclusion of independent and non-cognitive data and for which every opinion is as good as another. It has focused upon what ‘may be working’, guided by positive-effects in the University’s WP performance data. In its application it has employed methods of data searching and practitioner dialogue and combined these to produce tentative attributions of cause and effect where these can be supported with alignments of data for a range of indicators. Where possible, it has bolstered the case being made with further pilot-study research to produce more definite claims of causal effect.

This kind of approach, based upon practitioner engagement and acknowledgement of the limitations of what can be done, whilst working towards informed organisational improvement, can be applied for all programmes and at all institutional levels. Fundamentally however, it requires professional trust, openness and mutual support. It also requires the highest levels of commitment on the part of University professional and academic staff to the cause of WP and Fair Access. Indeed if this was a measure of wealth, the University of Liverpool could not be better off, as this evaluation has revealed abundantly.
8. Recommendations

8.1 For policy

- The Inclusive Department should be established as a policy-concept and term-of-reference for considerations of inclusivity for pedagogy, curriculum design, flexibility, involvement opportunities, forms of direct support, etc.

- The Relationships Model should be established as a policy-concept and term-of-reference for considerations of faculty-based outreach design. Where for instance strategies of high volume pupil contact for the purpose of popularising a subject are dominant, intensive relationships should be also established with target schools.

- The changing nature of the University’s student profile is introducing new pressures for professional teams. These should be acknowledged and where strains resulting from capacity and resource limitations are in evidence, these should be addressed.

- The implications of changes to the DSA need to be urgently considered. It is likely that elements of support will require University mainstream funding in order to maintain them.

- Decisions about ‘rebalancing expenditure’ ‘towards outreach’ or ‘towards retention’ for example, are premature at this stage. Such decisions will require far closer study of the dynamics of specific programmes and activities conducted by particular teams. They should be guided by the National Evaluation Framework when it is published. Such decisions will also need to be informed by the judgements of the professional and academic staff responsible for programme delivery. To this end structured practitioner involvement will remain crucial.

8.2 For professional practice

- All academic schools and departments should conduct a review of the levels of inclusivity for WP students within them.

- Closer service alignments between the Educational Opportunities team and all academic outreach teams should be established to improve targeting and overall engagement for schools and community outreach work.
• Closer service alignments between the Careers and Employability Service and academic teams should be established to strengthen the employability aspects of all subject areas.

• Forms of e-learning that meet specific needs should be promoted across the University. iLearn is an important example here.

• The SLATSO provides a model of student support that can be replicated for many schools and departments.

• Undergraduate and postgraduate involvement in outreach work is a positive model and should be considered by all academic outreach teams.

• MMI is a positive method for Fair Access considerations. Its use should be considered by all academic departments in selective subject areas for which interview-coaching, social bias and personality bias have historically skewed recruitment unfairly.

• The use of non-traditional qualifications for offers should be publicised in all marketing materials and promotional activities.

• All engagement events such as post-application visit days, discovery days, etc. should incorporate informal spaces in their design that allow prospective students and their parents-carers to ask questions of University staff, so improving the accessibility of the information, advice and guidance offered by the University.

• Opportunities for cross-learning between academic departments should be identified. One example here is the possible relevance of research being conducted into Critical Pedagogy approaches to assessment within HSS for students who have come on to University undergraduate programmes through BTEC or other non-examinations based routes.

8.3 For evaluation

• A second substantive evaluation phase should be orientated according to the field of provisional insights offered here to achieve effectiveness claims at raised levels of confidence for specific programmes and activities.

• This second phase should include the design elements and guiding principles outlined in this report but adjusted in the following ways:
  o for scale within specific programmes;
o for professional input through the creation of work-groups of colleagues from relevant teams and bringing together practitioner experience, data expertise and research capacity;

o for capacity with WP-leads provided with:

- Data Explorer licenses;
- professional time allocations;
- an ‘at-a-glance’ tool-kit summarising the methodology reported here;
- evaluation training where needed.

- Consideration should be given within each academic school and department to how the evaluation of specific activities, programmes, innovations etc. can improve effectiveness and produce reportable case-studies.

- A reporting cycle linking to the University committee structure should be established at all organisational levels for continuous and purposeful evaluation leading to reportable findings and case-studies and timed to feed into the design of the Access Agreement.

- WP and Fair Access concerns should be embedded within the normal survey cycles of the University and its faculties with ‘WP questions’ included, making cross-tabulations possible. Examples here are the Applicant Survey and departmental surveys such as those for peer-mentoring and peer-assisted learning.

- A ‘New Arrivals Survey’ should be established for all students, but designed to capture the perceptions, perspectives and experiences of WP cohorts within the wider student experience.

- For schools outreach work systematic evaluation should be established that is proportionate to resources and so sustainable. This can be achieved by incorporating ‘recall-based’ methodologies into follow-on work conducted sometime after an activity has been delivered. This approach, consistently applied would move the University’s assessments of effectiveness from ‘experience’ to ‘knowledge’ or from Level 1 to Level 2 of Kirkpatrick’s four-level evaluation model.\(^95\)

\(^{95}\) https://www.heacademy.ac.uk/sites/default/files/resources/Evaluation%20toolkit.pdf
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Appendix I

The methodology, step-by-step

**Applications, admissions, retention and progression**
- Data searches for eleven measures at University, faculty, school and departmental levels
- Interviews with WP leads to capture activity (innovations, policy, specific types of support, collaborations, etc.) and practitioner assessments about effectiveness in professional practice
- Positive data-effects incorporated into a ‘data-matrix’
- Alignments of clusters and practitioner assessments to create provisional insight
- Where such alignments suggest promising areas for further inquiry, pilot-studies conducted

**Outreach with schools**
- Interviews with Educational Opportunities staff to:
  - capture the design of programmes and models of practice;
  - elicit the intuitions of colleagues of what is effective for each of the programmes.
- Evaluation priorities determined for programmes and models of practice
- Pilot-studies designed for each evaluation priority using interview and survey tools

**Merging results to create a ‘field of provisional insight’**

**Synthesis and conceptual overview**

**Critical reflection and review, moving to next steps for evaluation and programme improvement**
Appendix II

Partner and Associate schools by Index of Multiple Deprivation (IMD)

Partner and Associate schools all have an IMD ranking of at least 60% and above. Partner schools have an IMD ranking above 90%. Data is unknown* for some of the schools that have been recently amalgamated into academies. However, the Educational Opportunities team know from past work with these schools, that they are deprived.

Partner and Associate school IMD (in ranked order from highest to lowest)

<table>
<thead>
<tr>
<th>Rank</th>
<th>School Name</th>
<th>IMD</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Ormiston Bolingbroke Academy (Halton High)</td>
<td>Unknown*</td>
</tr>
<tr>
<td>2</td>
<td>Knowsley Park Centre for Learning</td>
<td>Unknown*</td>
</tr>
<tr>
<td>3</td>
<td>Enterprise South Liverpool Academy (New Heys and St Benedict’s)</td>
<td>Unknown*</td>
</tr>
<tr>
<td>4</td>
<td>The De La Salle Academy</td>
<td>Unknown*</td>
</tr>
<tr>
<td>5</td>
<td>University Academy of Birkenhead (Rock Ferry and Park High)</td>
<td>Unknown*</td>
</tr>
<tr>
<td>6</td>
<td>The Academy of St Francis of Assisi</td>
<td>99%</td>
</tr>
<tr>
<td>7</td>
<td>Notre Dame Catholic College</td>
<td>99%</td>
</tr>
<tr>
<td>8</td>
<td>Alsop High School Technology &amp; Applied Learning Specialist College</td>
<td>99%</td>
</tr>
<tr>
<td>9</td>
<td>University Academy Liverpool (Shorefields)</td>
<td>99%</td>
</tr>
<tr>
<td>10</td>
<td>Hillside High School</td>
<td>98%</td>
</tr>
<tr>
<td>11</td>
<td>Parklands High School</td>
<td>98%</td>
</tr>
<tr>
<td>12</td>
<td>North Liverpool Academy</td>
<td>98%</td>
</tr>
<tr>
<td>13</td>
<td>Broadgreen International School, A Technology College</td>
<td>97%</td>
</tr>
<tr>
<td>14</td>
<td>The Hawthorne’s Free School</td>
<td>97%</td>
</tr>
<tr>
<td>15</td>
<td>Fazakerley High School</td>
<td>93%</td>
</tr>
<tr>
<td>16</td>
<td>St John Bosco Arts College</td>
<td>91%</td>
</tr>
<tr>
<td>17</td>
<td>Childwall School Sports &amp; Science Academy</td>
<td>91%</td>
</tr>
<tr>
<td>18</td>
<td>The Oldershaw School and Business and Enterprise College</td>
<td>90%</td>
</tr>
<tr>
<td>19</td>
<td>Cardinal Heenan Catholic High School</td>
<td>88%</td>
</tr>
<tr>
<td>20</td>
<td>Bellerive FCJ Catholic College</td>
<td>84%</td>
</tr>
<tr>
<td>21</td>
<td>Prenton High School for Girls</td>
<td>77%</td>
</tr>
<tr>
<td>22</td>
<td>Saints Peter and Paul Catholic College</td>
<td>66%</td>
</tr>
<tr>
<td>23</td>
<td>Weatherhead High School Media Arts College</td>
<td>64%</td>
</tr>
<tr>
<td>24</td>
<td>Calderstones School</td>
<td>64%</td>
</tr>
<tr>
<td>25</td>
<td>The Mosslands School</td>
<td>63%</td>
</tr>
</tbody>
</table>

*KEY: GREEN = Partner; BLUE = Associate.
Partner and Associate Schools by Free School Meals (FSM)

Partner and Associate schools all have a FSM take-up that is above the National Average of 16%. Partner schools have a FSM take-up of at least twice (some, up to four times) the national average: the lowest being 33%; and the highest being 73%.

Partner and Associate schools FSM (ranked in order from highest to lowest)

<table>
<thead>
<tr>
<th>Rank</th>
<th>School Name</th>
<th>FSM Take-Up</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>University Academy Liverpool (Shorefields)</td>
<td>73.1%</td>
</tr>
<tr>
<td>2.</td>
<td>The Academy of St Francis of Assisi</td>
<td>55.3%</td>
</tr>
<tr>
<td>3.</td>
<td>Parklands High School</td>
<td>49.5%</td>
</tr>
<tr>
<td>4.</td>
<td>Ormiston Bolingbroke Academy</td>
<td>49.1%</td>
</tr>
<tr>
<td>5.</td>
<td>University Academy of Birkenhead</td>
<td>47.4%</td>
</tr>
<tr>
<td>6.</td>
<td>Enterprise South Liverpool Academy</td>
<td>46.1%</td>
</tr>
<tr>
<td>7.</td>
<td>North Liverpool Academy</td>
<td>44.5%</td>
</tr>
<tr>
<td>8.</td>
<td>Notre Dame Catholic College</td>
<td>44.1%</td>
</tr>
<tr>
<td>9.</td>
<td>The Hawthorne's Free School</td>
<td>43.2%</td>
</tr>
<tr>
<td>10.</td>
<td>Alsop High School Technology &amp; Applied Learning Specialist College</td>
<td>43.1%</td>
</tr>
<tr>
<td>11.</td>
<td>The De La Salle Academy</td>
<td>41.1%</td>
</tr>
<tr>
<td>12.</td>
<td>The Oldershaw School and Business and Enterprise College</td>
<td>41.0%</td>
</tr>
<tr>
<td>13.</td>
<td>Childwall School Sports &amp; Science Academy</td>
<td>37.8%</td>
</tr>
<tr>
<td>14.</td>
<td>Hillside High School</td>
<td>33.3%</td>
</tr>
<tr>
<td>15.</td>
<td>Broadgreen International School, A Technology College</td>
<td>32.6%</td>
</tr>
<tr>
<td>16.</td>
<td>Knowsley Park Centre for Learning</td>
<td>32.4%</td>
</tr>
<tr>
<td>17.</td>
<td>Bellerive FCJ Catholic College</td>
<td>30.8%</td>
</tr>
<tr>
<td>18.</td>
<td>St John Bosco Arts College</td>
<td>30.6%</td>
</tr>
<tr>
<td>19.</td>
<td>Fazakerley High School</td>
<td>29.6%</td>
</tr>
<tr>
<td>20.</td>
<td>Saints Peter and Paul Catholic College</td>
<td>24.6%</td>
</tr>
<tr>
<td>21.</td>
<td>Cardinal Heenan Catholic High School</td>
<td>19.9%</td>
</tr>
<tr>
<td>22.</td>
<td>Prenton High School for Girls</td>
<td>19.9%</td>
</tr>
<tr>
<td>23.</td>
<td>Weatherhead High School Media Arts College</td>
<td>18.8%</td>
</tr>
<tr>
<td>24.</td>
<td>The Mosslands School</td>
<td>18.4%</td>
</tr>
<tr>
<td>25.</td>
<td>Calderstones School</td>
<td>18.0%</td>
</tr>
</tbody>
</table>

GCSE attainment (5 A*-C grades including Maths and English)

Partner schools have attainment at GCSE that is below the national average of 59.4%; the lowest attainment being 22%; the highest being 53%. With Associate schools there is flexibility regarding attainment (as stated in the original Access Agreement), in order to
take in to account strategic factors such as school-specialism or conversion rate to the University of Liverpool.

Eleven of the Associate schools attain below the national average; and five of the Associate schools attain just above the national average.