

Dadansoddi ar gyfer Polisi



Analysis for Policy

Ymchwil gymdeithasol
Social research

Number: 08/2010



Llywodraeth Cynulliad Cymru
Welsh Assembly Government

www.cymru.gov.uk

Research Into Part-time Higher Education Supply And Demand

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Views expressed in this report are those of the researcher and not necessarily those of the Welsh Assembly Government

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Welsh Assembly Government Social Research, 2010

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Glossary of acronyms

CPD	Continuing Professional Development
CQFW	Credit and Qualifications Framework for Wales
DIUS	Department for Innovation, Universities and Science
DLHE	Destinations of Leavers from Higher Education
FE	Further Education
FEI	Further Education Institution
HEBCIS	Higher Education Business and Community Interactions Survey
HE	Higher Education
HEFCE	Higher Education Funding Council for England
HEFCW	Higher Education Funding Council for Wales
HEI	Higher Education Institution
HESA	Higher Education Statistics Agency
HEW	Higher Education Wales
HNC	Higher National Certificates
NASMA	National Association of Student Money Advisors
NHS	National Health Service
NIACE	National Institute for Adult Continuing Education
NSS	National Student Survey
NTFW	National Training Federation for Wales
NUS	National Union of Students
OECD	Organisation for Economic Cooperation and Development
OU	Open University
OUIW	Open University in Wales
QAA	Quality Assurance Agency
SME	Small and Medium Sized Enterprises
SMU	Swansea Metropolitan University
SSC	Sector Skills Council
STEM	Science, Technology, Engineering and Mathematics
UCAS	Universities Central Admissions Service
UHOVI	Universities of the Heads of the Valleys Initiative
UWIC	University of Wales Institute of Cardiff
WESB	The Wales Employment and Skills Board

Executive Summary

Background

1. This report on the supply of, and demand for, part-time Higher Education (HE) provision in Wales was commissioned by the Welsh Assembly Government in January 2010 to 'help the Welsh Assembly Government identify where it might need to take action to sustain and increase successful part-time higher education participation in Wales'. The detailed objectives of the study included the requirement to review the characteristics of part-time provision and participation in Wales, including trends over time; to consider evidence with regard to future trends and unmet demand; and to investigate how Higher Education Institutions (HEIs) currently determine what provision to offer on a part-time basis and the level of fees to charge for such provision.
2. The research has involved the secondary analysis of relevant datasets, a review of key policy documentation and literature to elucidate the drivers of, and the context for, part-time provision of HE in Wales and fieldwork with some 37 stakeholders from 11 Welsh HEIs and other relevant organisations.

Policy Context

3. Welsh HEIs are operating within the context of an expanding but competitive global higher education market, where flexibility in terms of provision is becoming increasingly important. Demographic change, with the increasing demand for higher level skills and the growing need for those within the existing workforce to update their skills in line with rapid technological and societal change, is leading to a greater emphasis on provision which meets the needs of a much wider range of learners than the 'traditional' school leaver.
4. Within the UK, part-time learning already represents around 40 per cent of all enrolments within HEIs. However, part-time provision is diverse, with a strong presence of vocational and professional learning alongside

individuals choosing to follow more traditional undergraduate or postgraduate qualifications on a part-time basis. The King Review (2008) of part-time HE suggests that while much progress has been achieved, not least as a result of the demand of individual learners for greater flexibility, part-time provision remains in the shadow of more traditional full-time learning.

5. Within Wales, policy since devolution has emphasised the importance of part-time provision in meeting two key goals of HE policy: widening access for parts of the population who have not traditionally taken advantage of HE and meeting the needs of employers in terms of upskilling the workforce. A series of independent reviews (notably, the Rees Review, the Graham Review and most recently the Review led by Prof. Merfyn Jones) raised the importance of ensuring that changes to the funding of HE and to Student finance do not undermine the viability of part-time provision. More recently, *'For Our Future'*, the Welsh Assembly Government's new HE Strategy, has stressed the need for a HE system in Wales which is much more responsive to changing demand from individuals and employers, with a strong regional dimension and an increased emphasis on reconfiguration and collaboration between HEIs.

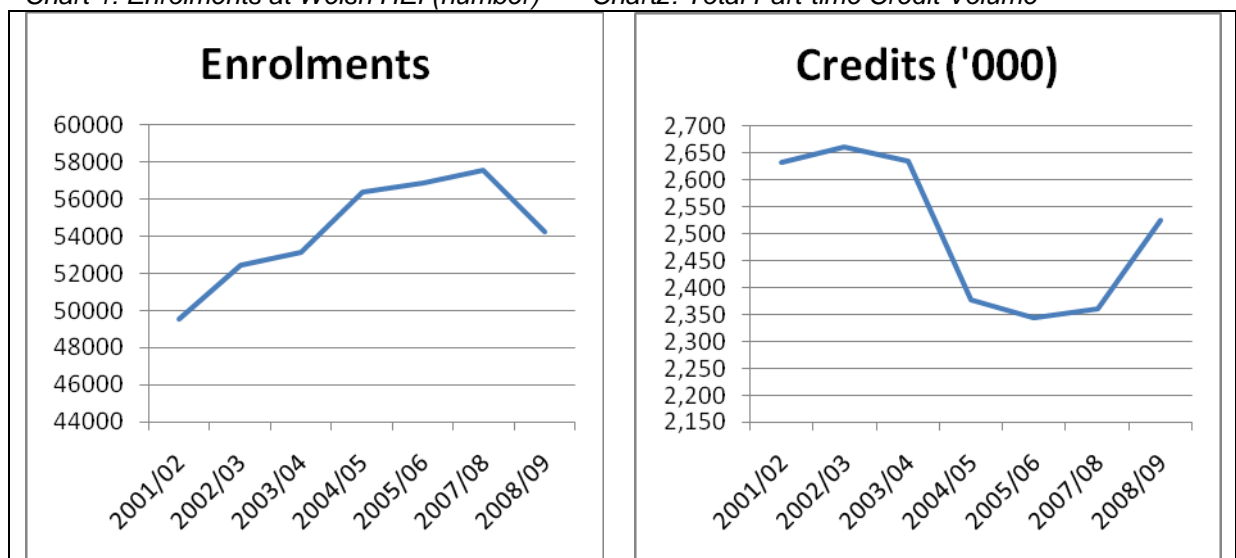
Evidence from the Data Analysis

6. While headline figures suggest there has been a steady increase in the number and proportion of HE enrolments which are of part-time students, this is largely the effect of the relatively recent inclusion in the data of enrolments of Welsh for Adults learners, who are generally studying at levels below undergraduate level ('further education'). After a sharp increase in the first years of the decade, part-time undergraduate enrolments have declined from a peak of 44,985 since 2004/5, though this appears to have been in part the result of a fall in the number of students following less intense courses, since overall credit volume has been rising in recent years.

7. Welsh HEIs vary considerably in terms of the role of part-time provision.

'Further education' enrolments are a key element of the part-time provision of a number of HEIs, such as Aberystwyth, Bangor, Cardiff, Glamorgan and Swansea but are of negligible importance for other HEIs. Four Welsh HEIs (the Open University in Wales (OUiW), Glamorgan, Glyndŵr and the University of Wales, Newport) together account for more than 60% of part-time higher education provision in Wales, although the proportion of part-time enrolments as a share of all enrolments has been falling in each of these, with the exception of the OUiW.

Chart 1: Enrolments at Welsh HEI (number) Chart2: Total Part-time Credit Volume



8. A higher proportion of part-time than full-time students are female (though this varies significantly between HEIs), and part-time students are generally older, with 71% aged between 25 and 59 and only 8% aged 20 and under (with equivalent figures for full-time students being 19% and 53%). Four subject areas – Languages, Education, Business and Administrative Studies, and Social Studies – account for around 50% of all part-time enrolments, though this has been falling over time.

9. While Wales appears to be successful at recruiting full-time students from neighbourhoods with generally low participation in HE, this is less true for mature part-time students.

10. Similarly, while Wales generally is a net 'importer' of students, this is not true for distance learning courses, where a relatively small proportion of Welsh based part-time students are following courses delivered by Welsh HEIs. Leaving aside the OUiW, the large majority of part-time students at Welsh HEIs are in campus-based provision, with only 10% of all undergraduate part-time learners at Welsh HEIs following distance learning courses.

11. Some 14% of 'higher education' provision and 34% of 'further education' provision (most of it Welsh for Adults) is delivered through franchise arrangements with Further Education Institutions (FEIs). Two HEIs – Newport and Glamorgan – account between them for over 60% of the 6,215 franchised higher education learners, though this also represents a significant proportion of the part-time enrolments at Glyndŵr, the University of Wales, Lampeter and the University of Wales Institute, Cardiff (UWIC). An additional 4,660 part-time higher education learners are enrolled directly at Welsh FEIs.

12. Around 30% of part-time undergraduates at Welsh HEIs do not continue studying after their first year – higher than for full-time students but slightly lower than is the case across the UK as whole. However, part-time students were significantly more likely to be in employment after completing their courses and were likely to be earning higher incomes than their full-time equivalents (with the median income £25,000 for former part-time students compared to £18,000 for former full-time students at Welsh HEIs) – though this may well be the result of the very different age profiles and the fact that many part-time students would have been in employment during their study.

13. Welsh medium part-time provision remains quite limited, with just under 4% of all learners receiving part of their tuition through the medium of Welsh, though enrolments have been increasing since 2006/7.

Evidence from the Fieldwork

14. The label 'part-time provision' covers a very wide range of different learning opportunities within Welsh HEIs. This includes:
- participation in 'standard' courses offered on either a part-time or full-time basis;
 - provision made available exclusively on a part-time basis on campus or at other venues (often related to professional qualifications);
 - distance-learning provision on a part-time basis;
 - provision tailored to specific employers' needs but where the course has a credit-bearing value and can be used to draw down Higher Education Funding Council for Wales (HEFCW) funding;
 - bespoke courses which are fully funded by employers;
 - community education provision which is at higher education level;
 - 'access' or other 'further education' level provision.
15. Many interviewees believed that Welsh Assembly Government policy in support of part-time provision does not pay sufficient regard to this diversity and needs to be more explicit in terms of what sort(s) of part-time provision it wishes to encourage. There was also thought to be a lack of clear thinking about the often quite complex relationships between part-time provision and the widening access and Third Mission agendas. At the same time, many interviewees stressed the increasing blurring of the distinction between full- and part-time students given the fact that a majority of the former also work part-time.
16. There are contrasting views between different Welsh HEIs of the importance of part-time provision, with many regarding it as marginal but others seeing it as fundamental to their mission. HEIs with high levels of part-time provision generally see their mission, rather than Government policy, as the key driver of their engagement with this agenda. However, (in the past at least) part-time provision has also allowed some HEIs to compensate for low demand from full-time applicants and to generate additional income, particularly where employers are able and willing to part-

fund provision. HEIs generally struggle with the concept of 'latent' or 'unmet' demand, with some arguing that their responsibility is rather to drive demand, particularly from employers.

17. Overwhelmingly, HEIs see the main barriers to part-time provision as being financial. Since the introduction of variable fees (and the associated Student finance arrangements for full-time students) it has been difficult to generate equivalent income from part-time students, even where employers are funding participation, despite additional 'Graham Funding'. With increasing demand for full-time places, and given the ability of HEIs to trade-off full-time against part-time credit volumes, finance directors are generally pushing for a reduced reliance on part-time provision. This is compounded by the fact that, in contrast to full-time provision, there is no central application system for part-time provision, making it more difficult (and expensive) for HEIs to attract applications. Many interviewees also argued that not just HEIs but society in general still works to a default position that students are full-time school leavers and organises provision accordingly, pointing to institutional barriers such as staff reluctance to work outside normal working hours.
18. HEIs do not generally have consistent policies on fees for part-time students, and employers are said to be reluctant to pay fees at a realistic level. The costs of part-time provision are generally thought to be higher, because of the 'transactional costs' of enrolling and providing core services to each individual student, the additional costs of recruitment and additional costs for provision and support outside standard hours.
19. With the obvious exception of the OUiW, Welsh HEIs appear relatively reluctant to invest in distance learning, particularly for undergraduate provision, because of the high start-up costs and issues over quality control. Some HEIs offer a significant volume of provision within community venues, though these are often institutions where part-time provision as a whole is relatively modest. While some HEIs have quite extensive franchise arrangements with FEIs, these are generally being scaled back. Many

HEIs have tried to increase the opening hours of key campus facilities to accommodate the increasingly varied needs of part-time (and full-time students) but for many, these remain less flexible than might be desired, principally due to the financial implications of longer opening and the expectations of academic staff with regard to working hours.

20. HEIs struggle to gather meaningful data on longer-term retention rates of part-time students, given the flexibility of such provision, but there is some suggestion that progression between courses is more of an issue than retention within them and that problems with retention are much more clearly related to socio-economic characteristics than to whether provision is part- or full-time.

21. In terms of the future, while a minority of interviewees believe that demographic and social change will drive HEIs to increase their part-time provision, most argued that part-time provision will continue to come under strong pressure, as HEIs respond to the upswing in applications for full-time places (and the simultaneous freezing or reduction in credit volumes as a result of public expenditure cuts) by prioritising what is essentially the more financially attractive option of shifting the balance of provision towards full-timers. However, the possible introduction of a cap on full-time provision because of student finance pressure is seen as a potential 'game-changer', as is the outcome of the Browne Review on University Funding in England.

Conclusions and Recommendations

22. The research suggests that there is a need for greater sharpness and clarity in terms of policy, with a clearer articulation of what sort of part-time provision the Welsh Assembly Government wishes to encourage. It also suggests that there is a real danger of overall provision continuing to fall over the next few years in the absence of clear changes to policy and that there is a need for a closer alignment between policy goals and the way in which those goals are operationalised, particularly through funding mechanisms. Action is also needed to address or mitigate some of the

other barriers to part-time provision, including the lack of any 'gateway' to the HE system for those interested in part-time study (to fulfil the role UCAS offers for full-time applicants), the lack of a level playing field in respect of Student finance, practical issues around the opening times of key student facilities and services and what many interviewees for this research see as the widespread cultural assumption that universities are still about educating young people on a full-time basis.

23. The report makes 15 recommendations, the most important of which relate to the need for the Welsh Assembly Government and HEFCW to consider:

- what types of part-time provision they particularly value and wish to promote and whether they both want and are able to ring-fence credits for certain types of part-time provision;
- how Welsh learners can be offered a greater range of part-time distance learning options, recognising the unique experience of the OUiW in developing, delivering and supporting such provision;
- whether the work of the Reaching Wider Partnerships needs to be rebalanced towards a greater emphasis on potential adult learners;
- whether there is a case for a part-time premium in place of, or in addition to, the current Graham funding in order to offset the fact that *pro rata* fee levels cannot be achieved for most provision, given the requirement for part-time students (or their sponsors) to pay fees up front;
- whether, in the context of the emerging regional agenda, the most appropriate way forward is to specifically task a small number of HEIs to lead on employer engagement in their region, working closely with FEIs, private providers and the Welsh Assembly Government itself and to recognise this through the allocation of credit volumes;
- the appropriateness and feasibility of developing a fees policy or fees assumption for HEI-provided part-time learning;
- whether HEIs should be trying to cultivate and nurture 'home grown' learners or whether, rather, HEIs should be collaborating more closely

with other providers to ensure progression routes are available for previously excluded learners who have entered on lifelong learning routes at low levels but have HE ambitions;

- whether it is possible to develop a national gateway for those interested in part-time learning to complement the UCAS system;
- how the Student finance system can be made more equitable from the perspective of part-time learners who are financing their own studies, particularly given the fact that 'full-time' students are increasingly also working while studying;
- whether they need to offer clear guidance on expectations in terms of the opening hours of core facilities and student support services to Welsh HEIs.

1 INTRODUCTION

Purpose of the Report

- 1.1 **Old Bell 3 Ltd.**, in association with Dateb and Steve Raybould, was appointed by the Welsh Assembly Government in January 2010 to carry out Research into Part-time Higher Education (HE) Supply and Demand in Wales.
- 1.2 The aim of the research was to ‘help the Welsh Assembly Government identify where it might need to take action to sustain and increase successful part-time higher education participation in Wales’.
- 1.3 Below this, a number of specific objectives were set for the research. These are shown in Box 1.

Box 1: Objectives of the Research

- 1 Review the characteristics of part-time participation by institution, subject, qualification aims, and enrolments.
- 2 Identify and explore trends or patterns regarding the modes of study available, and take up: e.g. e-learning, on-campus, weekend study, evening/day part-time, work based learning, HE in FE.
- 3 Identify and explore trends or patterns in dropout before completion (e.g. whether significant in terms of mode, subject, type of learner, location etc).
- 4 Identify and explore where there might be evidence pointing to future trends (e.g. demographics and economic circumstances).
- 5 Investigate the scale and character of Welsh medium part-time availability and take up.
- 6 Investigate where there might be unmet demand for part-time higher education in Wales, and whether or how it is being recorded.
- 7 Identify and explore the factors that affect decisions by HEIs on whether or not programmes are to be delivered on a part-time basis.

- In particular, how do HEIs identify and assess latent demand.
- 8 Identify the factors that affect which part-time HE programmes are delivered by HE providers.
 - 9 The reasons for falling enrolments on part-time HE programmes in Wales since 2005.
 - 10 Investigate the views of HEIs on the impact part-time participation and delivery has on their institutional performance, mission, profile and quality.
 - 11 Investigate the views of HEIs on their future plans regarding part-time higher education, and the opportunities and challenges they anticipate regarding maintaining and expanding part-time Higher Education.
 - 12 Investigate whether fees charged by HEIs for part-time courses are pro rata fees charged for full-time courses.
 - 13 Investigate the views of learners as articulated via National Union of Students (NUS) Cymru and other appropriate representative bodies on current provision of the available programmes for part-time students.
 - 14 Investigate the views of learners as articulated via NUS Cymru and other appropriate representative bodies on the support available for part-time students and how it affects decisions about remaining in education.

14.1 It was recognised at the Inception Stage that limited data availability might constrain the capacity to fully address all of these objectives.

Background

14.2 Overall responsibility for the funding of HE in Wales was devolved to the National Assembly for Wales on its creation in 1999. Subsequently, the Higher Education Act 2004 devolved responsibility for tuition fees and student support to the Welsh Assembly Government, thus affording the Welsh Assembly Government the opportunity to further shape HE provision across Wales. Funding for HEIs is administered by HEFCW,

an Assembly Government Sponsored Body established by statute, whose Mission is to 'promote internationally excellent higher education in Wales, for the benefit of individuals, society and the economy, in Wales and more widely'.

14.3 At the same time, the 12 Welsh HEIs operate in a context which is heavily influenced by developments elsewhere in the UK and indeed globally. The Research Councils, which award specific research funding, are UK bodies, while the market for Welsh Institutions is far larger than Wales:

- Welsh-domiciled students account for less than 50% of all enrolments on full-time courses;
- a third of Welsh students who are studying full-time are doing so outside of Wales;
- nearly 30% of all postgraduate students and almost 50% of part-time postgraduate students at Welsh HEIs are 'overseas' (i.e. non-EU) students¹.

14.4 Welsh Assembly Government policy has increasingly stressed the importance of part-time provision in terms of offering greater flexibility to meet the needs both of individual students, particularly those from non-traditional backgrounds and of employers, who are seen to be increasingly in need of bespoke support to meet high level skills needs.

14.5 Thus, Phase 2 of the Review of the Mission, Purpose, Role and Funding of Higher Education, commissioned by the Welsh Assembly Government and led by Professor Merfyn Jones, published in June 2009, noted the essential role of part-time provision:

'Effective part-time opportunities and flexible delivery are essential components of widening access, but have a wider relevance to higher education. Given the need for developing higher level skills within priority sectors, the skill needs of those not currently in the workforce,

¹ Figures taken from HEFCW's Annual Report 2008/2009 using 2007/2008 data

and the need to accommodate an increasingly diverse learning community, flexibility of delivery is a core requirement. Part-time higher education, and the credit based funding system which underpins it, offers Wales significant scope to raise the volume of higher level participation and achievement within workforces and communities².

14.6 However, the report went on to point out some of the barriers to part-time provision:

‘We have noted the difference in the financial support arrangements for part-time and full-time students, especially in relation to part-time students – unlike those who study full-time - having to pay fees up front. While the reasons for such differences are complex and varied, their starkness is uncomfortable, particularly when in reality the study patterns of full-time and part-time students are increasingly blurred because of the potential flexibility available through the credit system recognising that this will vary from institution to institution depending on mission, the composition of the student body and the local population base’³.

14.7 It also noted that ‘greater investigation is needed into areas where our understanding is currently weak’, including latent demand for part-time study, the extent to which up-front fees and other costs were deterring participation and the extent of retention difficulties experienced by HEIs in respect of part-time studies. The call for further research informed the commissioning of this study.

14.8 In response to the Merfyn Jones Review, the Welsh Assembly Government published in November 2009 *‘For our Future: A 21st Century Higher Education Strategy and Action Plan for Wales’*. This takes up the theme of the need for a much stronger focus on part-time study:

² The Review of the Mission, Purpose, Role and Funding of Higher Education, p.13

³ Ibid.

‘We expect to see greater opportunities for individuals to learn on a part-time basis, with more programmes designed with appropriate flexibility. We expect to see stronger market responsiveness by higher education providers which can ensure an appropriate balance between learning opportunities, need and demand. We also expect greater equity between part-time and full-time students in terms of financial support and fee policy’⁴.

14.9 However, the Strategy also draws attention to the fact that current arrangements do not allow HEFCW to direct provision. £270 million of the current £296 million funding made available from HEFCW to fund teaching in Welsh HEIs is channelled through formula funding. This consists of a relatively modest *per capita* payment per enrolled student and a payment per credit taught. While HEIs’ allocations are based on historic data which includes a split between credits studied by full and part-time students, HEIs are free to alter the mix of provision (both between types of study and between subjects).

14.10 ‘*For Our Future*’ makes clear the intention of the Welsh Assembly Government to work with HEFCW to develop concrete changes to the planning and funding of HE, including the creation of a regional approach, to deliver its broader policy goals. The current research thus offers an opportunity to help inform this process with a more authoritative evidence base.

Methodology

14.11 The Work Programme for the research involved the secondary analysis of relevant datasets, notably those available from the Higher Education Statistics Agency (HESA) via the Welsh Assembly Government and a review of key policy documentation and literature to elucidate the drivers of, and the context for, part-time provision of HE in Wales.

⁴ For our Future: A 21st Century Higher Education Strategy and Action Plan for Wales, p4

14.12 It also involved fieldwork with a total of 18 individuals from a range of relevant stakeholder organisations, including the Welsh Assembly Government itself, HEFCW, the Wales Employment and Skills Board (WESB), NUS Cymru, Higher Education Wales (HEW), the National Association of Student Money Advisors (NASMA), Colleges Wales, the National Training Federation for Wales (NTFW) and National Institute of Adult Continuing Education (NIACE) Dysgu Cymru as well as 19 relevant staff at the following HEIs:

- Aberystwyth University (Aberystwyth)⁵;
- Bangor University (Bangor);
- Cardiff University (Cardiff);
- Glyndŵr University (Glyndŵr);
- The Open University in Wales (OUiW);
- Swansea University (Swansea);
- Swansea Metropolitan University (SMU);
- Trinity University College, Carmarthen (Trinity);
- University of Glamorgan (Glamorgan);
- University of Wales Institute Cardiff (UWIC);
- University of Wales, Newport (Newport).

Structure of the Report

14.13 In the remainder of this Report, we

- Provide a fuller account of the policy context within which the research has taken place (Section 2);
- Present an analysis of relevant data on the profile of part-time HE in Wales (Section 3);
- Report on the findings of our qualitative fieldwork with HEIs and other stakeholders, focusing particularly on drivers and barriers to provision of part-time opportunities (Section 4);
- Present our Conclusions and Recommendations (Section 5).

⁵ In the remainder of this report we use the abbreviations shown in brackets

2 POLICY CONTEXT

Chapter Summary

Welsh HEIs are operating within the context of an expanding but competitive global higher education market, where flexibility in terms of provision is becoming increasingly important. Demographic change with the increasing demand for higher level skills and the growing need for those within the existing workforce to update their skills in line with rapid technological and societal change, is leading to a greater emphasis on provision which meets the needs of a much wider range of learners than the 'traditional' school leaver.

Within the UK, part-time learning already represents around 40% of all enrolments within HEIs. However, part-time provision is diverse, with a strong presence of vocational and professional learning alongside individuals choosing to follow more traditional undergraduate or postgraduate qualifications on a part-time basis. The King Review (2008) of part-time HE suggests that while much progress had been achieved, not least as a result of the demand of individual learners for greater flexibility, part-time provision remains in the shadow of more traditional full-time learning.

Within Wales, policy since devolution has emphasised the importance of part-time provision in meeting two key goals of HE policy, widening access for parts of the population who have not traditionally taken advantage of HE and meeting the needs of employers in terms of upskilling the workforce. A series of Independent Reviews has emphasised the importance of ensuring that changes to the funding of HE and to Student finance do not undermine the viability of part-time provision, while most recently, *'For Our Future'*, the Welsh Assembly Government's new HE Strategy, has stressed the need for a HE system in Wales which is much more responsive to changing demand from individuals and employers, with a strong regional dimension and an increased emphasis on reconfiguration and collaboration between HEIs.

Introduction

- 2.1 This Section sets out the context for the future development of part-time HE in Wales, recognising that while policy is devolved to the Welsh Assembly Government, Welsh HEIs operate within a UK wide (and indeed global) market and are thus affected by the development of policy and research elsewhere within the UK.
- 2.2 Firstly, the global context within which HE is operating is considered (Section 2.2) before turning to the development of Welsh policy in respect of HE since devolution in 1999 (Section 2.3), the evolution of policy at a UK level (Section 2.4) and some recent research on broader issues in relation to HE and its implications for part-time provision (Section 2.5).

The Global Context for Higher Education

- 2.3 *'Prosperity for all in the global economy - world class skills'* (the Leitch Report) outlined a series of challenging targets for skills and training in the UK and called for thoroughgoing reform of the skills and adult education sectors⁶. In doing so, Leitch provided a fresh impetus to policy and decision makers to challenge existing practices and formulate systems and approaches that would help ensure UK competitiveness in the twenty-first century.
- 2.4 Central to the recommendations of the Leitch Report was the need to establish and embed a 'culture of learning' across the UK which would act to 'raise awareness and aspirations' and 'increase choice'⁷. However this, it was argued, would not be achieved through the traditional approach of supply-side planning of learning provision. What was needed instead were proposals to rationalise the skills system, towards

⁶ Leitch Review of Skills (2006) *Prosperity for All in the Global Economy – World Class Skills* (Leitch Review), HMSO: London.

⁷ *Ibid*, page 140.

a more demand led approach that placed individuals and employers more at its heart. This would require closer and better links between government, HEIs and employers in shaping the approach to learning provision⁸.

2.5 With specific reference to HE, the Leitch Report set a target for more than 40% of UK adults reaching Level 4 qualification by 2020 (up from 29 per cent in 2005)⁹. Underpinning this target the Review identified the need for:

- shared responsibility – increased investment in HE from individuals, employers and government;
- ‘economically valuable’ education and demand led provision, that is, provision that meets the needs of individuals and employers and supports labour mobility;
- an education system that can adapt to changing markets;
- continuity and the rejection of change for change’s sake, choosing instead improvements obtained by simplifying and rationalising existing structures.

2.6 In many ways the Leitch Review merely confirmed what was already understood by HEIs operating within the education ‘marketplace’. At a fundamental level, part-time provision in HE in Wales is driven by the same global forces driving all HE and FE provision. The role of HEIs is being transformed by the shift towards a global knowledge-economy and there are major challenges in meeting an increasing demand for leading-edge, high-quality HE systems¹⁰.

2.7 Moreover, this increased emphasis has been matched with growth in the sector at the global level. This in turn has led to greater international

⁸ Ibid, page 138

⁹ Ibid

¹⁰ Final Report of an Independent Study into the Devolution of the Student Support System and Tuition Fee Regime in Wales (2005) *Fair and Flexible Funding: A Welsh Model to Promote Quality and Access in Higher Education* (Rees Review), Cardiff: Welsh Assembly Government, page 15

competition for staff, students, funding and research money. As a result more pressure is being placed on national governments to provide effective, efficient and equitable solutions that offer a competitive profile in the global market.

- 2.8 In Wales and across the UK the demand for HE continues to grow. However, participation rates, though improved over the last decade, are still below that of many other developed economies¹¹. Moreover, access to HE remains significantly correlated with parental income and wealth¹².
- 2.9 Part-time learning in the HE sector is already significant in terms of its scale: across the UK there are, for example, around one million part-time HE students in HEIs and FEIs¹³. This is around 40% of all HE students¹⁴.
- 2.10 At the UK level, evidence also suggests that a relatively high proportion of part-time students studying for qualifications are female (62% of total part-time students, compared to 54% of students studying full-time). Meanwhile proportions of ethnic minorities studying part-time are lower (10% compared to 17% for full-time courses)¹⁵.
- 2.11 The reasons for studying part-time are undoubtedly diverse (potentially more so than is true for full-time students) but include: those seeking 'second chance' study who need to combine study with work; recent graduates acquiring more job specific skills; continuing professional development related to the workplace and updating knowledge/skills to sustain, enhance or change careers; those from widening participation

¹¹ Department of Business, Innovation and Skills (2009), *Higher Ambitions: The future of universities in the knowledge economy, Executive Summary*, UK Government: London: UK Government, page 2.

¹² Ibid

¹³ Universities UK & Guild HE (2006) *Part-time Students and Part-time Study in Higher Education in the UK, Strand 1: A Quantitative Data Analysis of 2003/2004 HESA Data* prepared by Professor Brian Ramsden Nigel Brown Associates, London: Universities UK, page 10.

¹⁴ Ibid

¹⁵ Ibid

groups and those studying for reasons of interest/leisure and non-vocational continuing education including those in retirement age¹⁶.

2.12 Broadly however, research findings suggest that:

- most students studying part-time for major qualifications identify vocational reasons as primary motives for undertaking study (the exception being research doctorates which are split between vocational and other factors);
- part-time students following HNC programmes are almost exclusively motivated by vocational factors, as are those following postgraduate diplomas and certificates;
- interest in the subject is a primary motive for around 30% of first degree part-time students¹⁷.

2.13 In terms of the courses undertaken, subjects allied to medicine and education¹⁸ are the subjects most studied on part-time HE courses¹⁹. Conversely, biological sciences, law, engineering and creative arts are the least studied. However, beyond this it must be stressed that a substantial number and type of courses and programmes are available across the UK, mirroring the diversity in learner motivations. Despite this, two broadly defined categories can be identified:

- undergraduate and postgraduate provision delivered on a part-time basis. This element shares many of the characteristics of the full-time first degree/post graduate degree market. Undergraduate part-time provision is thought to be primarily driven by employer demand for graduates and the perceived net financial benefits to the individual of a degree; post graduate part-time is thought to be primarily driven by the

¹⁶ Ibid, page 11

¹⁷ Ibid, pages 19 and 20

¹⁸ Ibid page 35. 'Subjects allied to Medicine' includes: Anatomy, Physiology and Pathology Aural and Oral Sciences, Complimentary Medicine, Medical Technology, Nursing, Nutrition, Ophthalmics, Pharmacology, Toxicology and Pharmacy. 'Education' includes: Academic Studies in Education, Training Teachers, Research and Study Skills in Education and Others subjects in Education.

¹⁹ Ibid, page 19

demand in the economy for the highest level skills and the availability of financial support from employers or other sources

- the various strands of professional and vocational qualifications (including Foundation Degrees), which may be at undergraduate or postgraduate level and other community learning provision including courses delivered in partnership with FE²⁰. This may involve courses of quite limited duration but which nevertheless carry credit within the HE credit system.

Welsh Higher Education Policy Since Devolution

Policy Foundations

2.14 The Welsh Assembly Government has been committed for some time to supporting part-time HE in Wales. Since the Bologna Declaration (1999), Wales and other European nations have been committed to meeting HE challenges by adopting approaches that are flexible, accessible and mobile across areas and regions²¹.

2.15 The first Welsh HE Strategy, *'Reaching Higher'* (2002) set out many of the principles underpinning the current approach to part-time HE in Wales, notably an emphasis on widening access by targeting 'low participation neighbourhoods', being pro-active in supporting students (e.g. student hardship funding and supporting community based delivery), improving retention rates by encouraging academic progression beyond existing levels and 'allowing students to easily transfer' between workbased and FE courses on the one hand and HEI provision on the other²². Similarly, in relation to links with employers, *'Reaching Higher'* included generic commitments to developing a more skilled workforce, improving the relationship between HEIs and the

²⁰ Ibid, page 14.

²¹ The Bologna Declaration (1999) *Joint declaration of the European Ministers of Education* (June 1999).

²² Welsh Assembly Government (2002) *Reaching Higher: Higher Education and Learning Country: A strategy for the higher education sector in Wales*, Cardiff: Welsh Assembly Government, pages 8-10.

private sector and increasing the profitable commercialisation of knowledge developed within HEIs.

- 2.16 In 2002, the Welsh Assembly Government set out its 10-year economic strategy in *'A Winning Wales'*²³. A core element of the strategy was recognition of the inter-dependence between the Welsh economy, lifelong learning and a plethora of other policy areas such as health, transport and community development.
- 2.17 Further commitment to the themes raised in *'Reaching Higher'* was given in *'Wales: A Better Country'* (2003), the Programme of Government for the Welsh Assembly Government between 2003 and 2007²⁴. The Programme identified high quality skills and education as key drivers in the attainment of a competitive, productive and high value added economy, with HEI-employer engagement and knowledge transfer seen as important mechanisms through which this was sought to be achieved.
- 2.18 In *'Making the Connections'* (2005) the Assembly made clear its broad rejection of competitive approaches to public service in favour of more collaborative models of delivery that would better empower the service user in shaping the design and delivery of public services in Wales²⁵. The strategy arguably also hinted at a 'less telling, more trust' type approach to service delivery in Wales by making clear the need to 'simplify the layers of regulation and inspection of public services in Wales'²⁶.

²³ Welsh Assembly Government (2002) *A Winning Wales: The National economic Development Strategy of the Welsh Assembly Government*, Cardiff: Welsh Assembly Government.

²⁴ Welsh Assembly Government (September 2003) *Wales A Better Country: The Strategic Agenda of the Welsh Assembly Government*, Cardiff: Welsh Assembly Government.

²⁵ Welsh Assembly Government (2005), *Making the Connections: Delivering a Better Services for Wales: The Welsh Assembly Government vision for public services*, Cardiff: Welsh Assembly Government.

²⁶ *Making the Connections*, page 25

2.19 Early in the life of the devolved Welsh Assembly Government, its broad education policy framework had been set out in *'The Learning Country'* (2001)²⁷. The strategy placed the concept of lifelong learning at the heart of the education agenda in Wales. In *'The Learning Country 2: Delivering the Promise'* (2006) clear emphasis was placed on an education system that was accessible to all and at all levels²⁸, while *'The Learning Country: Vision into Action'* (2006) specifically pledged, in respect of HE, to 'enhance the opportunities for studying part-time and the support for part-time learners in response to the recommendations of the Graham Review'²⁹.

Rees, Graham, Webb and Jones

2.20 In practice much of part-time HE related policy has been shaped by a series of independent reviews commissioned by the Welsh Assembly Government over recent years.

2.21 In 2003/2004, in the wake of the debate over the introduction of variable tuition fees in England, the UK Government and the Welsh Assembly Government agreed that responsibility for student finance and the tuition fee regime should be devolved to the Welsh Assembly Government³⁰. The Welsh Assembly Government subsequently commissioned an independent review, chaired by Professor Teresa Rees CBE to advise it on the way forward in respect of tuition fees and student support³¹.

2.22 The Rees Review reported in May 2005. The Review clearly acknowledged the important and growing role of part-time HE study in

²⁷ Welsh Assembly Government (September 2001) *The Learning Country*, Cardiff: Welsh Assembly Government

²⁸ Department of Education, Lifelong Learning and Skills (2006): *The Learning Country 2: Delivering the Promise*, Cardiff: Welsh Assembly Government

²⁹ Department of Education, Lifelong Learning and Skills, (2006): *The Learning Country 2: Vision into Action*, Cardiff: Welsh Assembly Government

³⁰ Section 27 and 38, *Part 3: Student Fees and Fair Access, Chapter 8, Higher Education Act 2004*, UK Government: London

³¹ Final Report of an Independent Study into the Devolution of the Student Support System and Tuition Fee Regime in Wales (2005) *Fair and Flexible Funding: A Welsh Model to Promote Quality and Access in Higher Education* (Rees Review), Cardiff: Welsh Assembly Government.

Wales, drawing particular attention to the value of part-time HE study in enhancing employee skills, widening participation, supporting economic regeneration, and enhancing civil and cultural life in Wales by impacting on social cohesion, active citizenship and other measures.

2.23 An essential theme of the review was the need to ensure ‘flexibility’ in the student support system; for example, that while lifelong learning might include HE study it might also include ongoing vocational and/or lower level training. The overall assertion was that while much had already been done in improving access to, and provision of, part-time education within Welsh HEIs, much remained to be done, particularly in achieving parity between part-time and full-time study arrangements. In this respect, the Rees Review acknowledged the growing pressures on Welsh HEIs (as commercial organisations) to ensure that part-time courses provided similar financial returns as their full-time counterparts³². In particular it was recognised that any significant gap between the financial returns generated from part-time and full-time provision which resulted from the new fee arrangements might create a disincentive for Welsh HE as a whole to deliver part-time provision (and other flexible courses such as short courses) and might particularly disadvantage those HEIs which had a relatively greater focus on part-time provision³³.

2.24 In conclusion, the report suggested ‘any new funding arrangements for HE, and student support systems, should enhance, rather than jeopardise existing successful part-time provision’³⁴. In this respect, Recommendation Four of the Review (which focused on part-time students) called for an Independent Review to be undertaken to make recommendations to the Welsh Assembly Government on creating an

³² *Rees Review*, page 83

³³ It was noted by the Review that many fixed costs including staff, library provision, buildings and other resources were incurred by HEIs irrespective of whether they deliver part-time or full time courses. Since fees for full time courses are higher than their part-time equivalents then there would be an in-built disincentive for HEIs to provide part-time courses.

³⁴ *Ibid*, page 86

affordable, practicable, simple and transparent system of fees and student support for part-time students³⁵.

2.25 In light of the Rees Review, the National Assembly for Wales approved the introduction of higher flexible fee structure – in line with a similar introduction in England – for HEIs in Wales, beginning in 2007/2008. This allowed HEIs to charge up to £3,000 per annum for course fees for full-time undergraduates and provided for Tuition Fee Loans to be introduced to ensure that full-time students did not have to pay any element of the fees upfront. However – and in contrast to England – the National Assembly also introduced an Assembly Fee Grant of £1,800 for Welsh domiciled students choosing to study at Welsh HEIs, thus capping the individually-paid fee at £1,200.

2.26 The arrangements in respect of fees were specifically focused on full-time students, with part-time students being eligible neither for the Assembly Fee Grant or the Tuition Fee Loan.

2.27 The response to Recommendation Four of the Rees Review came in the form of the Graham Review - the Independent Review of Part-time Higher Education Funding in Wales, chaired by Dr. Heather Graham, which reported to the Welsh Assembly Government in June 2006³⁶.

2.28 The review sought to 'prepare recommendations on an affordable, practicable and transparent system of funding, fees and student support for part-time HE students in Wales'³⁷ and was based on a desire to achieve 'parity of esteem' across the various approaches to learning³⁸. In particular, this meant accepting that learning patterns need not follow a full-time continuum but rather recognising and seeking to support discontinuous, flexible and part-time learning patterns. Essential to this

³⁵ Ibid, page 53

³⁶ Final Report, Chaired by Dr Heather Graham (2006) *Independent Review of Part-Time Higher Education Study in Wales* (Graham Review), Cardiff: Welsh Assembly Government.

³⁷ Graham Report, page 29

³⁸ Ibid, page 28 drawing upon *National Committee of Inquiry into Higher Education (The Dearing Report)* 1997, UK:NCIHE Publications.

was seen to be the achievement of financial neutrality between the competing choices of full-time, part-time or discontinuous study while, at the same time, recognising that public resources were finite.

2.29 Research undertaken for the review showed that students chose to study part-time for mainly pragmatic reasons such as affordability, family commitments and 'convenience'³⁹. Motives were primarily 'to gain a qualification', 'to improve skills and career prospects' and to a lesser extent, a 'general interest in the subject' or a 'desire to be stretched'⁴⁰.

2.30 In terms of barriers to part-time take up, the Graham Review survey found that over half of part-time students said that financial support provided was not enough - and this percentage was even higher for young students and part-time workers⁴¹.

2.31 The Report was clear in stating that future support arrangements should be delivered through a system that:

- 'is responsive to, and tailored for, the wider needs of the society and economy in Wales;
- is adequately resourced, and offers an effective use of public funds;
- takes into account the settlement already agreed for full-time learners in higher education in Wales;
- safeguards and where possible enhances existing part-time opportunities in higher education, including those which are supported by employers;
- maximises opportunities for all to be able to access and participate in high quality higher education;
- enables learners to make choices regarding mode of study based upon what is most appropriate to their needs rather than financial incentives

³⁹ Convenience and the availability of specific subjects also helped determine where they studied.

⁴⁰ Graham report, page 8

⁴¹ Ibid, page 8

or disincentives (except where such differences can be objectively justified or in the public interest);

- takes account of the varying ability of students to make a financial contribution to the cost of their studies, and gives most support to those in greatest need;
- does not financially disadvantage institutions that offer part-time opportunities;
- enables students to pursue their studies to the best of their ability;
- recognises parity of esteem for different modes of study, such as face-to-face study and distance learning;
- is clear, simple, comprehensive and consistent;
- is flexible and responsive to both learner and provider and easily administered;
- is based on fairness and equality of opportunity;
- assists in increasing participation in learning from those parts of Wales, and those sections of Welsh society, where existing levels of participation are low;
- is responsive to the circumstances of learners with particular needs, such as older learners, those with dependents and disabled learners;
- takes regards of the fact that both Welsh and English are widely spoken in Wales, and that Wales is a multicultural society;
- is responsive to the needs of learners from all parts of Wales including those from geographically remote communities⁴².

2.32 The Graham Report presented 16 specific recommendations, including a preferred generic model of part-time student finance support and wider recommendations relating to entitlement and arrangements, aimed at reducing complexity, increasing take up rates and achieving (as far as was possible given resource constraints) parity with full-time study support.

⁴² Graham Report, page 4

2.33 In presenting these recommendations, however, the Report noted the difficulties arising from the piecemeal arrangements which characterised funding for part-time students and the diversity of types of part-time provision (and part-time students) in Welsh HEIs.

2.34 The recommendations required the adoption of a model of student finance which in terms of public funding included - over and above a per capita payment for each enrolled student and a payment towards tuition costs calculated pro rata on the basis of credit volume and subject – ‘an additional funding stream intended to compensate for the lower tuition fees paid by part-time students, based on the total number of part-time credits being studied at each institution’⁴³.

2.35 Other recommendations suggested that this additional funding stream should be linked to two broader themes of HEI policy, Widening Access and Third Mission employer-facing activities, which were seen as particularly relevant to part-time provision.

2.36 In light of the recommendations of the Graham Review, the Welsh Assembly Government established a working group of key HE sector stakeholders in Wales to develop suitable proposals in line with the findings of the Review. Central to their subsequent suggestions was the funding of activities in support of:

- the widening access agenda within HEIs (linked primarily to HEIs’ Widening Access strategies but also including their Learning and Teaching strategies);
- employer engagement (linked to HEIs’ Third Mission strategies)⁴⁴.

2.37 Figure 1 provides further background on these two areas of HEI activity which are critical to an understanding of the way in which the Additional Funding has been used.

⁴³ Ibid, page 74

⁴⁴ HEFCW (2009) *Evaluation of the Additional Funding for Part-time Student*, Final Report prepared by Old Bell 3 Ltd (November 2009), Cardiff: Welsh Assembly Government

Figure 1: Widening Access and Third Mission Strategies

Widening Access

Welsh HEIs first submitted widening access strategies, in their current format, in February 2001⁴⁵. Broadly, the aim of the widening access agenda has been to break down the perceived barriers and widen access to learning in higher education.

The Reaching Higher strategy published by the Welsh Assembly Government in 2002 made a formal commitment – including a commitment to extra funding - to support and progress the widening access agenda. In response, HEFCW formulated the Reaching Wider initiative to drive progress in respect of the four Reaching Higher widening access target groups: people living in Communities First areas, Black and ethnic minority groups, people who wish to study through the medium of Welsh and disabled people. Four regional partnerships - North Wales, West and Mid Wales, South West Wales and South East Wales – were established in 2002 to progress widening access and Reaching Wider activities in a *'regionally co-ordinated manner'*⁴⁶.

Third Mission

The Third Mission Fund was established by HEFCW in June 2004 to support 'activities that stimulate and direct the application and exploitation of knowledge to the benefit of the social, cultural and economic development of ...society'⁴⁷.

Examples, of Third Mission activities include initiatives supporting enterprise and entrepreneurship, including the development of spin-out companies, training, consultancy and contract research services to businesses, and innovation and knowledge transfer projects.

⁴⁵ Arad Consulting, Evaluation of the Widening Access Activities and Reaching Wider Initiatives in Welsh higher education institutions, Final Report January 2007, page i

⁴⁶ Arad Consulting evaluation page ii

⁴⁷ Third Mission Funding Arrangements 2007-08 to 2009-10, HEFCW Circular W07-18HE, May 2007, page 1

2.38 An evaluation of the Graham funding carried out by Old Bell 3 for HEFCW in 2009 found that, despite the slow start by some HEIs, there was good evidence, overall, of implementation of these measures⁴⁸. The breadth of coverage of widening access priorities was, on the whole, considered particularly 'impressive'⁴⁹. However, while the HEIs in Wales were able to demonstrate satisfactory levels of employer engagement, concerns were raised that first, these tended to be overly skewed towards public sector organisations and second, that employers were rarely asked to contribute to the costs of engagement and any subsequent provision. The latter finding was particularly interesting in the context that many HEIs considered that the additional funding activities placed substantial cost burden on existing overheads. More generally, concerns were raised for both Widening Access and Third Mission categories in relation to the extent to which HEIs in Wales had successfully linked activities to measurable outcomes such as attributable increases in the number part-time students.

2.39 The implications of the Graham Review and subsequent HEFCW focus on widening access and employer engagement activities inevitably challenged HEIs in Wales to re-examine their existing links with FEIs.

2.40 In 2007, the Independent Review of the Mission and Purpose of Further Education in Wales, chaired by Sir Adrian Webb called for radical changes in the way post-14 education was delivered in Wales⁵⁰. Included in the 139 recommendations was the need to build closer links between FE and HE (and between both and employers) to ensure retention and support progression to higher level study, while the Report stressed the importance of HE offering vocational routes, responsive to the needs of employers including Foundation Degrees.

⁴⁸ HEFCW (2009) *Evaluation of the Additional Funding for Part-time Student*, Final Report prepared by Old Bell 3 Ltd (November 2009), Cardiff: Welsh Assembly Government.

⁴⁹ *Ibid*, page 39. Though it was thought that generally more could have been provided in the way of pastoral support.

⁵⁰ *Promise and Performance: The Report of the Independent Review of the Mission and Purpose of Further Education in Wales* Welsh Assembly Government, December 2007

- 2.41 The recommendations inherently challenged HEI's existing attitudes towards FE, effectively asking them to look again at the main thrust of *'Making the Connections'* and cultivate an approach that would be based upon collaboration across the whole post-16 sector rather than competition.
- 2.42 In the wake of the Webb Review, and with pressures mounting in terms of the financial commitments arising from the student finance package agreed as a result of the Rees Review, the Welsh Assembly Government commissioned in 2008 an Independent Review of Higher Education in Wales chaired by Professor Merfyn Jones.
- 2.43 The Group presented the first phase of its findings, focused on student finance, in October 2008. The Report confirmed that 'any student finance system should effectively address Welsh Assembly Government policy objectives including widening access, take up of priority subjects, a skilled workforce for Wales and promotion of Welsh medium study'⁵¹.
- 2.44 The Review noted that the Assembly Fee Grant (providing a Grant of £1,800 per annum to Welsh domiciled full-time undergraduate students studying at Welsh HEIs) was not well targeted towards these overall policy goals and recommended its abolition, with students instead being able to access Tuition Fee Loans to cover the full £3,000 fee charged by HEIs (as was the case in England). The savings made using this new approach should, it was argued, be used to fund more targeted support to students with the greatest financial needs.
- 2.45 Phase 2 of the Review, published in June 2009, made a number of recommendations directly or indirectly relevant to part-time study in Wales. These included:
- articulating more clearly the role and importance of higher education to individuals and employers and communities;

⁵¹ *Review of Higher Education in Wales Phase 1: Student Finance Arrangements: Report from the Chair of the Task and Finish Group* Professor R. Merfyn Jones, October 2008.

- a refreshed National Access Strategy to targeting areas of low participation;
- a more clear and concise approach to delivering the widening access agenda, achieved primarily by the consolidation of the various strands of existing support;
- a clear and transparent framework for means tested student bursaries reflecting learner needs and national priorities;
- maintaining the current support arrangements stemming from the Graham Review: 'Part-time learning [should be] supported and monitored in ways which recognise its current and future significance to fulfilling aspiration, inclusion and workforce development. This includes maintenance of the current support arrangements introduced following the Graham review'⁵²;
- strengthening business-HE relationships to better inform demand, better exploit knowledge through applied research and increase training.

2.46 However, the Review also noted a number of potential barriers to successfully implementing these recommendations including:

- a recent fall in the number of part-time students in Wales (after significant growth for a decade);
- current economic (and funding) uncertainties linked to the recent worldwide recession;
- institutional changes (e.g. the merger between Lampeter and Trinity);
- longer term trends including an ageing demographic profile.

Recent Policy Developments

2.47 'One Wales', the Programme for the coalition Welsh Assembly Government adopted in late 2007, re-stated the ambition for a knowledge based economy and stressed the importance of increasing the flexibility of the HE system and adult participation in HE:

⁵² *Review of Higher Education in Wales Phase 2* (June 2009), page 22.

‘We are resolved to develop a further and higher education system which offers a broad range of learning opportunities, is responsive to the needs of students and employers, and tackles poverty and disadvantage. We are committed to widening participation in higher education’⁵³.

2.48 The programme also presented a vision of Wales where ‘learning throughout life is the norm’⁵⁴ and emphasised the importance of more and better collaboration between educational institutions and an increased focus on developing those skills needed in the workplace.

2.49 To achieve this ‘*One Wales*’ proposed:⁵⁵

- extra assistance with student debt and maintaining existing fee levels in Wales up to and including 2009/10, along with the maintenance of the current level of resource throughout the four year National Assembly for Wales term, and doing whatever was possible to mitigate the effects on Welsh-domiciled students of any removal of the cap on fees;
- supporting work on widening participation for all ages in FE and HE, promoting adult and community learning both in relation to employability and the wider benefits which education brings;
- ensuring that extra funding was tied to new approaches in HE, in particular the reconfiguration and collaboration agenda, which aimed to increase the financial stability of Welsh HEIs and develop a more coherent pattern of provision across Wales;
- establishing a new National Youth Service Fund, a National Science Academy, new National Research Centres and a Welsh-medium Higher Education Network.

2.50 Following on from ‘*One Wales*’, ‘*Skills That Work for Wales*’ (2008) replaced the earlier Skills and Employment Action Plan (2005) and

⁵³ Welsh Assembly Government (2007) *One Wales: A progressive agenda for the government of Wales*, Cardiff: Welsh Assembly Government, page 24

⁵⁴ *One Wales*, page 21

⁵⁵ *Ibid.*

represented Wales' primary response to the findings of the Leitch Review.

2.51 Although not overly focused on HEI, the strategy drew clear links with the demand led agenda and presented the case for seeking increased financial contributions from individuals and employers, particularly at higher levels of learning⁵⁶. The strategy argued for an approach to education in Wales that was:

- integrated: skills, employment and business development as inextricably linked;
- responsive: 'customer led and customer driven'⁵⁷;
- based on shared responsibilities: the cost burden should be met by all beneficiary stakeholders;
- quality driven: defined as meeting the needs of customers, with only quality provision receiving public funding support;
- open to all: irrespective of race, ethnicity, disability, gender, sexual orientation, age or religion or preference for provision in English or Welsh language.

2.52 In many respects the strategy asked stakeholders in Wales to view the skills agenda with fresh eyes. The perceived 'targets culture' was addressed for example, with recognition that 'creating skills' rather than meeting 'arbitrary qualifications targets' was what mattered⁵⁸.

2.53 The report also highlighted the importance of:

- the Credit and Qualifications Framework for Wales (CQFW) in offering learners greater flexibility in the way they study particularly in relation to short, focused courses undertaken at periods convenient to the customer⁵⁹;

⁵⁶ *Skills That Work for Wales*, page 29

⁵⁷ 'Customers' being learners, employers and communities in Wales

⁵⁸ *Skills That Work for Wales* page 21

⁵⁹ *Ibid*, page 62

- increasing the demand for, and supply of, intermediate and high level skills, including management, leadership and technical skills⁶⁰;
- achieving an appropriate balance between supporting ‘portable’ and specialist (i.e. employer specific) skills development⁶¹;
- simplifying employer engagement processes through an expanded Workforce Development Programme, operating as part of the Flexible Support for Business programme⁶²;
- HEIs addressing the issues of scale by collaborating with one another and engaging with employers on joint projects (through for example the Academic Expertise for Business (A4B) programme).

2.54 The strategy also specifically endorsed Foundation Degrees for the first time, and recognised that the majority of high-level workforce skills training and education would be part-time. In addition to committing (Third Mission) funding for employer engagement specifically, the strategy also considered the need to target a number of priority sectors for the Welsh economy. These included those sectors traditionally demanding so-called science, technology, engineering and mathematics (STEM) graduates as well as others considered strategically important for the sustainable growth of the Welsh economy.

2.55 On the basis of these developments, HEFCW set out its new three year Corporate Strategy in 2009⁶³. The strategy set out a number of strategic outcomes expected to be in place in HE in Wales by the year 2012.

2.56 While all key priority areas identified in the strategy had some links to part-time provision in Wales, at least three had direct or strong links, namely:

- ‘delivering the reconfiguration and collaboration agenda’;

⁶⁰ Ibid, page 22

⁶¹ Ibid, page 54

⁶² Ibid, page 57

⁶³ Higher Education funding Council for Wales (2009) *Corporate Strategy and Corporate Plan 2009/10 to 2011/12*, Cardiff: Welsh Assembly Government 2009.

- ‘widening access to Higher Education, with a particular emphasis on part-time students’;
- ‘strengthening the economic, social and cultural role of HEIs, not least with regard to the skills and employment agenda, especially in the context of the challenges arising from the recession’⁶⁴.

2.57 Underpinning these objectives was the need for HEFCW to ‘support HEIs in adopting a more holistic approach to activities across all three HE mission areas (research, teaching and third mission) that enables them to articulate more effectively their impact on economic, social and cultural well-being’⁶⁵. To achieve, this HEFCW would need to work in partnership with stakeholder bodies ‘within and without the higher education sector’⁶⁶.

2.58 According to the Strategic Plan, a number of short term challenges would also need to be met⁶⁷:

- the impact of the recent recession and how to mitigate its effects;
- a continued need to rationalise HE in Wales through the reconfiguration and collaboration agenda, including a number of high profile initiatives such as collaboration on the University of the Head of the Valleys Initiative (UHOVI)⁶⁸, and the Welsh Medium Higher Education Network - Coleg Ffederal – with HEIs;
- being able to show demonstrable progress e.g. by developing a framework to gather evidence of delivery and impact and evaluate the effectiveness of current expenditure in securing outcomes;
- ensuring the financial viability of Welsh HEIs, as the sector was impacted upon by changes in tuition fee arrangements in Wales; changes in the strategic use of core funding and other exogenous factors such as opportunities arising from the European Funding programmes.

⁶⁴ Corporate Strategy, page 9

⁶⁵ Ibid, page 21

⁶⁶ Ibid, page 6

⁶⁷ Ibid, page 7 and 8

⁶⁸ Ibid, page 24

- 2.59 The Strategic Plan also raised concerns in light of the (then) Department for Innovation, Universities and Skills (DIUS) decision to withdraw funding for students who were studying for a qualification that is equivalent to, or lower than, a qualification that they had already been awarded (the so called ELQ rules)⁶⁹.
- 2.60 Finally, the strategy was rather unclear on any specific plans in relation to establishing 'parity' between the full-time and part-time HE experience, though issues such as improved pastoral care and access to facilities within HEIs might be included in the commitment to work 'with the QAA [Quality Assurance Agency] to implement new quality assurance arrangements to ensure high quality provision for learners and meet HEFCW's statutory responsibilities, and further developing our approach to supporting quality enhancement'⁷⁰.
- 2.61 While the HEFCW Corporate Strategy is intended to cover the period to 2012, the landscape has changed since its publication by the Welsh Assembly Government's response to the Jones review which is contained in '*For Our Future*' (2009) the new HE strategy for Wales⁷¹.
- 2.62 The strategy sets out a refreshed approach to much of the original aims described in '*Reaching Higher*'. As an overarching theme, the report synthesises current thinking on what is required in order to achieve the desired culture of lifelong learning in Wales that would underpin HE's wider contribution to economic and social justice objectives.
- 2.63 What that means in practice is a HE system in Wales which demonstrates better coherence and responsiveness overall⁷². The strategy recognises that different providers will have different strengths,

⁶⁹ These rules have not yet been applied in Wales

⁷⁰ Ibid, page 8

⁷¹ Department for Children Education, Life Long Learning and Skills (November 2009) *For Our Future: The 21st Higher Education Strategy and Plan for Wales*, Cardiff: Welsh Assembly Government.

⁷² For Our Future, page 11

as well as different organisational objectives⁷³. However, the strategy makes plain the need for HEIs to work together (and with FE) to complement and enhance these individual strengths and missions. Moreover, HE is encouraged to develop a more regional dimension to planning and delivery of higher education in order to reduce further undesirable local competition between providers⁷⁴. In these respects the Welsh Assembly Government makes clear that joint planning and delivery needs to be underpinned by a new approach to funding methodologies⁷⁵.

2.64 *'For Our Future'* also stresses that HE providers will need to be more responsive in ensuring that supply meets demand. This means recognising and adapting to changes in 'learner profiles' and their associated needs, for example, adapting to changes in the average age profiles, motivations and expectations of future learners. In measuring 'market responsiveness' measures such as the findings of National Student Survey should be included. Moreover, 'employability' should be a key outcome of the HE system. This means an emphasis on work focused skills such as leadership, team working, innovation and communication, and working with Sector Skills Councils, employers and others to ensure better linkages between course content and identified skill shortages, gaps and needs⁷⁶.

2.65 The strategy makes clear the expectation that HE will provide greater opportunities for individuals to learn on a part-time basis, with both more flexibility built into courses and wider offerings from HE providing different ways to experience higher education.

2.66 Elsewhere recommendations focus on:

⁷³ Ibid, page 1

⁷⁴ Ibid, page 12

⁷⁵ Ibid, page 11

⁷⁶ Ibid, page 6

- greater scope for learning in progressive steps through the CQFW. This means greater consideration for accreditation of prior learning and further work on the development of pathways;
- encouraging more work-based learning through partnership between employers and providers which would include the shaping and delivery of that learning whether in the form of standardised courses like Foundation Degrees or bespoke learning;
- continuing the work of widening participation and improving pathways to HE learning by HEIs in Wales working collaboratively with partner bodies to ensure equality of access, particularly targeting rural and/or disadvantaged areas;
- more emphasis within the HE system on supporting re-training/re-skilling and STEM subjects overall;
- greater equity between part-time and full-time students in terms of financial support and fee policy.

The Evolution of UK Policy

2.67 Outside Wales, the King Report into part-time study in UK HE (2008) represented a major review of the status quo and the prospects for part-time HE within the UK, confirming that that while much had been achieved since Leitch much more still remains to do⁷⁷. The report noted that just over one quarter of adults hold a degree - less than many other OECD countries and well below the Leitch target of more than 40% of the working age population qualified to level 4 and above by 2020⁷⁸.

2.68 The report identified some barriers hindering progression with the part-time agenda, including:

⁷⁷ King C. (2008) *Part-time Study in Higher Education*, A report commissioned by John Denham, Secretary of State for Innovation (King Report), Universities and Skills, London: HMSO.

⁷⁸ Interestingly on this point, the Higher Education Policy Institute have presented evidence that the Leitch target can only be reached through substantial increases in part-time provision. (see Bekhradnia, B (2007) *Demand for higher education to 2020 and beyond*, HEPI Report Summary 31).

- financial support for part-time students which falls below that of full-time students compounding the perception that part-time study is of less importance than full-time study;
- issues around access to learning both administratively and geographically (including a lack of online and blended learning approaches);
- traditional university systems, timetables and calendars still constructed in relation to full-time study and more generally a HE culture based on a presumption that learners should fit their lives with these systems rather than *vice-versa*;
- the concentration of part-time provision in only some of the HEIs across the UK, with 60 HEIs accounting for 77% of the part-time population;
- access to university facilities such as student support, catering or libraries being severely limited at evenings and weekends, making part-time learning ‘a desolate experience’;
- the risk of working with employers and hence being exposed to risks based upon the decisions they make and often volatile contexts in which they operate.

2.69 The report also highlighted the irony that whilst 83% of part-time students are in employment it is also the case that 66% of full-time students are in employment during term time and 82% in vacations⁷⁹.

2.70 The report concluded that the complexity of arranging provision to meet the diverse needs of different sorts of part-time students led to ‘quiet resignation in university planning meetings’ and the side-lining of part-time provision compared to ‘the real business’ full-time education. For at least some in HEI, re-prioritising the system towards part-time provision was said to be akin to the ‘tail wagging the dog’⁸⁰.

⁷⁹ Callender, C et al. (2006) *Part-time research strand 3: A survey of students’ attitudes and experiences of part-time study and its costs*.

⁸⁰ King Report, p. 4.

2.71 Nevertheless the King report, noting that some 40% of all HE students in the UK were already studying on a part-time basis, stressed the central role HEIs could play in helping support the skills agenda. The report highlighted a number of enabling factors including:

- access to new technologies that afforded new ways of learning including online and blended approaches;
- increasingly flexible attitudes within HEIs;
- HEIs being well placed to ensure not only increases in part-time and flexible learning but also demonstrable increases in skills specifically related to economic prosperity such as innovation, creativity and enterprise⁸¹;
- the potential for HEIs to offer much in the anticipation and promotion of so-called 'sunrise subjects', those new skill areas likely to be in great demand in the future;
- part-time provision seeming closer to many modern economic realities such as economic mobility, the end of the job for life and multi-career paths as some sectors rise while others fall;
- clear links with changes in societal attitudes and cultural norms such as parents active in employment or training during the early years of raising a child;
- in the competitive global market for learner recruitment the current UK workforce offering a large and mainly untapped (latent) demand⁸², with evidence suggesting that while increases in part-time study were mainly associated with older learners entering or re-entering HE, more young people were also choosing part-time learning in HE;
- growing evidence that HEIs could rise to the challenge of providing flexible learning approaches by recognising and meeting the needs of a wide range of learner types.

⁸¹ Ibid, page 2

⁸² DIUS (2008) Research report 08 06 *University is not just for young people: Working adults' perceptions of orientation to higher education*, Institute of Employment Studies.

2.72 Drawing on the work of Beer and Marr (2007) the King Report suggested (albeit somewhat idealised) options for increasing flexibility⁸³. These included, for example, eliminating the division between full and part-time funding in terms of regulation, funding and support, and introducing flexible funding systems based solely on achieved credit, irrespective of mode and place of delivery, subject area and whether the learner dips in and out of learning.

2.73 Finally, the report provided a number of recommendations for policy makers in respect of part-time HE, the main thrust of which appear to be:⁸⁴

- working with the HE sector and employers to understand more about the needs of key stakeholders in relation to part-time HE and ways in which these needs can be supported;
- recognising the risks of challenging traditional HE provision and providing support including financial support that recognises the extra costs associated with change;
- supporting – perhaps through revised performance indicators - HEIs to challenge the incumbent culture of the sector which tends to hold greater esteem for those academics undertaking research or providing teaching than those providing for example flexible learning and workforce development provision;
- emphasising retention rates as a key measure of part-time learner satisfaction and indication of the flexibility of HEIs in meeting the needs of the learner;
- acknowledging that while there are differences between individual learner demand at Level 4 and above and employer demand, both are important to most HEIs;
- ensuring that there is equality of access to part-time HE provision;
- ensuring that advice and guidance systems currently in operation include information on flexible learning opportunities and investigating

⁸³ Beer, J and Marr, L (2007) *Re-imagining the Student Experience* Keynote address given at the HEA annual conference, Harrogate, 2007.

⁸⁴ King Report, page 10 and 11

the concept of a national application system (along the lines of UCAS for full-time students) to better service the engagement and information needs of all learners;

- ensuring the development of appropriate funding mechanisms to facilitate the growth of flexible learning;
- introducing a system of student finance and support which is mode free and which incentivises progression and considering the approaches of countries such as Norway that have shown substantial growth in part-time learning;
- adopting a realistic view of employer engagement and working to better determine the extent of employer demand and the cost of bespoke programme delivery;
- understanding that co-funding (attempts by the Higher Education Funding Council in England to increase the proportion of the total costs of work-related learning paid for by employers) should not replace mainstream funding as a model to deliver expanded access to higher level skills and qualifications.

2.74 It should be also highlighted that much of what underpins the King Report appears to be the notion that it is the learners themselves that are challenging the structures and presumptions of higher education. The assertion is that wider societal changes mean that students are increasingly discerning in their choice of learning provider and this may be particularly pronounced for part-time learners. As such HEIs are perhaps for the first time having to adapt their approaches to the needs and wants of learners.

2.75 Following the King Report, the '*Higher Ambitions*' strategy presented by the Department for Business, Innovations and Skills commits the UK Government to 'ensuring that all those who have the ability to benefit can get access to higher education'⁸⁵. The strategy recognises the need

⁸⁵ Department of Business, Innovation and Skills (2009), *Higher Ambitions: The future of universities in the knowledge economy, Executive Summary*, UK Government: London: UK Government, page 3

go further with things like widening participation, for example, using ‘new ways to use contextual data in their [HEIs] admissions procedures to assess the aptitude and potential to succeed of those from poor backgrounds’⁸⁶. Notably, the strategy also calls for ‘excellent teaching for all students in higher education, with Universities competing to attract students on the basis of the excellent service they provide’⁸⁷. This seems somewhat at odds with ‘*For Our Future*’ which calls for more collaboration, less competition at the local level, though at the same time, is clearly in line with the agenda in Wales to bring the ‘student experience’ of HE to the forefront of redefined (market orientated) outcomes⁸⁸.

2.76 Nevertheless, and in line with ‘*For Our Future*’, ‘*Higher Ambitions*’ stresses the UK Government’s commitment to increasing the amount of part-time provision:

‘In order to attract a greater diversity of students, more part-time study, more vocationally-based foundation degrees, more work-based study and more study whilst living at home must be made available. This is a core aim of these proposals, and our wider skills strategy’⁸⁹.

2.77 Professor Adrian Smith’s 2010 review into postgraduate HE in the UK considered amongst other things issues surrounding access to postgraduate courses⁹⁰. Key findings included:

- good progress has been made in relation to the provision of alternate approaches to offering courses such as distance learning, blended and modular postgraduate courses;

⁸⁶ Ibid, page 5

⁸⁷ Ibid, page 12

⁸⁸ Ibid, page 5. Findings from a study by Bristol University and relayed by The Times newspaper (28 March 2010) stated that potential approaches may include accepting lower grades from students attending schools in disadvantaged areas.

⁸⁹ Ibid., page 3

⁹⁰ Professor Adrian Smith (March 2010), *One Step Beyond: Making the most of post graduate education*, Review presented to Department for Business, London: Innovation and Skills.

- there are good levels of accessible (particularly online) information for part-time students provided by HEI and Careers services though no single point of reference for someone considering postgraduate study;
- only a minority of taught postgraduates receive financial support for postgraduate study and systems differ markedly from the case at undergraduate level;
- surprisingly little is known about the background of postgraduates, and in particular whether those from less privileged backgrounds are less likely to participate;
- more should be done to on the supply side to ensure postgraduate skills are responsive to needs and requirements of the labour market. This means engaging with SSCs and others to identify the specific issues relating to postgraduate level skills;
- HEIs should work with the QAA to overcome any identifiable barriers to quality assuring flexible postgraduate provision delivered partly in the workplace or by more than one HEI.

2.78 Finally, it should be stressed that *Lord Browne's Review of Student Finance in HE in England* may have a substantial (potentially seminal) impact on the part-time HE landscape in Wales. The review, which will consider both part-time and full-time students, will examine the balance of contributions to universities by taxpayers, students, graduates and employers. A range of options - including raising the tuition fee level - are to be considered.

2.79 However, though the findings will not be published before the General Election, the review has been criticised as paving the way for higher fees and a market in prices that would see poorer students priced out of more prestigious universities⁹¹.

Recent Research into Part-Time Provision

⁹¹ <http://news.bbc.co.uk/1/hi/education/8350051.stm>

2.80 Other recent research undertaken into the HE sector has considered a number of issues around demand and supply side factors.

2.81 A number of UK wide policy reports have focused on older people and the implications of demographic change on learning patterns. *'Building a society for all ages'*⁹², *'The learning revolution'*⁹³ and the *'Inquiry into the future of lifelong learning'*⁹⁴ have all emphasised the importance of education for those aged over 50 years. However, according to NIACE 'the balance of opportunity and support for learning through different stages of life is wrong'⁹⁵. They note that participation declines directly with age in a way far greater than could be explained by any age-related decline in individual capacity⁹⁶. Instead they propose that a new model of 'educational life course' should be adopted as a means of better targeting resources to specific needs across the generations. Their model is defined by four age group stages: under 25, 25–50, 50–75, 75+years⁹⁷.

2.82 The Universities UK report *'Active ageing and universities engaging older learners'*⁹⁸ considers the current and future education and training issues surrounding older learners (defined as those aged 50 and over) with particular attention to their involvement in higher education.

2.83 Noting that presently, only a small proportion of the 50-plus age group is involved in formal educational study and that part-time take up from 'mature students' has primarily come from younger age groups, the report points out that with an expected growth of around one million adults over 50 in the next decade, the context for older people's demand

⁹² Department for Work and Pensions (2009) *Building a society for all ages* London: DWP.

⁹³ Department for Innovation, Universities and Skills (2009) *The learning revolution* London: DIUS.

⁹⁴ Schuller T and Watson D (2009) *Learning through life* Leicester: NIACE.

⁹⁵ National Institute of Adult Continuing Education (2009) *Learning Through Life: Inquiry into the Future of Lifelong Learning* Summary prepared by Schuller, T and Watson D, UK: Flexpress Ltd, page 4.

⁹⁶ *Ibid*, page 5

⁹⁷ *Ibid*, page 3

⁹⁸ *Universities UK* (2010) *Active ageing and universities: engaging older learners*, Report prepared by Phillipson C. and Ogg J.

for HE is likely to change dramatically⁹⁹. A central point of the report is that UK citizens may be required to work longer and retrain more times in their lives than has been the case for previous generations. Moreover, traditional approaches to work are being challenged as illustrated by the recent rise in self-employment, part-time working and consultancy work.

2.84 The report raises concerns that though a number of UK universities have developed centres or institutes of lifelong learning, in most cases course provision is 'built upon' existing approaches rather than tailored or taking account of the particular needs of older generation ('third age') learners. Examples include limited provision of flexible courses catering for informal learning styles (like those promoted by The University of the Third Age) and concerns surrounding funding support (already removed in England and under discussion in Wales) for those taking qualifications at a lower level than they may already hold¹⁰⁰.

2.85 In essence, the report argues that HEIs can take a number of approaches to supporting 'third age' learning, including¹⁰¹:

- educational and personal development programmes: similar to existing lifelong learning provision but tailored to the diverse needs and motivations of the post-50 market;
- employment-related programmes: programmes in support of those continuing/extending their working lives. The emphasis here will be on moving from full-time employment to self employment and consultancy;
- social inclusion programmes: widening participation for the over 50s as well as younger age groups;
- health and social care programmes: with the central theme of '*active ageing*'.

2.86 In terms of employer engagement, NIACE research has confirmed the important role played by employers in the decision to engage in lifelong

⁹⁹ Ibid, page 11

¹⁰⁰ Ibid, page 33-34 and 36

¹⁰¹ Ibid, page 40

learning¹⁰². They found that attachment to work is a ‘powerful factor’ in determining engagement with learning. Even in a low ranking role the likelihood of engagement is higher than for those who are out of the labour market altogether¹⁰³.

2.87 However, research conducted by the Council for Industry and Higher Education suggests there is a mismatch between the perceived needs of employers and the supply offered by HE: HEIs are viewed by employers as offering more formalised (less bespoke) training taking place over longer timescales via onsite (campus) facilities; yet employers want a diverse range of training subjects driven by specific and discrete needs ranging from improving basic skills to PhD and high level research collaborations¹⁰⁴.

2.88 This creates a dilemma for many HEIs: do what they are perceived to do best or challenge traditional approaches to offer more tailored solutions? The research argues that a middle ground approach may offer the best way forward: that HE will benefit most from focusing on what it is good at - as this is what employers’ value most – however, employer demand for higher learning is more likely to get converted successfully into HE supply if there is genuine collaboration and mutual benefit, including taking into account the needs of the other key stakeholder group: the learners¹⁰⁵.

2.89 In practice this means HEIs should:

- raise their profile through more and better marketing amongst employers and providing information on the types of training and

¹⁰² National Institute of Adult Continuing Education (2009) *Learning Through Life: Inquiry into the Future of Lifelong Learning* Summary prepared by Schuller, T and Watson D, UK: Flexpress Ltd. Page 7

¹⁰³ Ibid, page 5

¹⁰⁴ Council for Industry and Higher Education, (2008) *Influence Through Collaboration: Employer Demand for Higher Learning and Engagement with Higher Education Summary Report prepared by Connor H. & Hirsh W., London: CIHE.*

¹⁰⁵ Ibid, page 9

education approaches they can offer and crucially the potential benefits to employers from engaging with HEIs;

- ensure that the needs of learners are not overlooked for example in relation to the provision of good quality and accessible learner focused information;
- be willing to invest appropriate levels of resource into building relationships;
- keep a flexible, open-minded approach (examples might include: shaping provision based on learner feedback; be willing to work with, or in conjunction with, other training providers; and be willing deliver courses off campus) and encourage employers and learners to adopt a similar mindset;
- have efficient organisation and administrative process such as a single point of contact;
- make best use of the relationship in relation to, for example, acquiring information on the latest industry research and wider intelligence including news, 'drivers' and trading conditions;
- support the wider aims of universities by, for example, building links with the employers in relation to graduate recruitment¹⁰⁶.

2.90 Overall, the research questions the validity of traditional customer - supplier type of contractual model of employer-HE engagement preferring instead an approach whereby employers and HE providers engage to build trust and understanding.

2.91 The research concludes by noting that policy makers can support HEI employer engagement by:

- supporting the development of real collaboration rather than supplier led engagement;
- acknowledging that higher level learning operates within a wider network of training providers and that this is a strength that should be developed through collaboration rather than competition;

¹⁰⁶ Ibid, pages 10-12.

- helping employers and HE providers to find good partners and sustain relationships over time;
- ensuring a central role for SSCs in articulating skills needs of the sector to HE and helping to facilitate employer engagement with HE;
- providing practical support and funding but within a system that is less complex to employers;
- promoting the importance of innovation and supporting skills developments linked to innovation¹⁰⁷.

¹⁰⁷ Ibid, page 13

3 THE PROFILE OF PART-TIME PARTICIPATION AT WELSH HEIs

Chapter Summary

While headline figures suggest there has been a steady increase in the number and proportion of HE enrolments which are of part-time students, this is largely the effect of the relatively recent inclusion in the data of enrolments of Welsh for Adults learners, who are generally studying at levels below undergraduate level ('further education'). After a sharp increase in the first years of the decade, part-time undergraduate enrolments have declined from a peak of 44,985 since 2004/5, though this appears to have been in part the result of a fall in the number of students following less intense courses, since overall credit volume has been rising in recent years.

Welsh HEIs vary considerably in terms of the role of part-time provision. 'Further education' enrolments are a key element of the part-time provision of a number of HEIs, such as Aberystwyth, Bangor, Cardiff, Glamorgan and Swansea but are of negligible importance for other HEIs. Four Welsh HEIs (the OUiW, Glamorgan, Glyndŵr and Newport) together account for more than 60% of part-time higher education provision in Wales, although the proportion of part-time enrolments as a share of all enrolments has been falling in each of these, with the exception of the OUiW.

A higher proportion of part-time than full-time students are female (though this varies significantly between HEIs), and part-time students are generally older, with 71% aged between 25 and 59 and only 8% aged 20 and under (with equivalent figures for full-time students being 19% and 53%). Four subject areas – Languages, Education, Business and Administrative Studies, and Social Studies – account for around 50% of all part-time enrolments, though this has been falling over time.

While Wales appears to be successful at recruiting full-time students from neighbourhoods with generally low participation in HE, this is less true for mature part-time students.

Similarly, while Wales generally is a net 'importer' of students, this is not true for distance learning courses, where a relatively small proportion of Welsh based part-time students are following courses delivered by Welsh HEIs. Leaving aside the OUiW, the large majority of part-time students at Welsh HEIs are in campus-based provision, with only 10% of all undergraduate part-time learners at Welsh HEIs following distance learning courses.

Some 14% of 'higher education' provision and 34% of 'further education' provision (most of it Welsh for Adults) is delivered through franchise arrangements with FEIs. Two HEIs – Newport and Glamorgan – account between them for over 60% of the 6,215 franchised higher education learners, though this also represents a significant proportion of the part-time enrolments at Glyndŵr, Lampeter and UWIC. An additional 4,660 part-time higher education learners are enrolled directly at Welsh FEIs.

Around 30% of part-time undergraduates at Welsh HEIs do not continue studying after their first year – higher than for full-time students but slightly lower than is the case across the UK as whole. However, part-time students were significantly more likely to be in employment after completing their courses and were likely to be earning higher incomes than their full-time equivalents – though this may well be the result of the very different age profiles and the fact that many part-time students would have been in employment during their study.

Welsh medium part-time provision remains quite limited, with just under 4% of all learners receiving part of their tuition through the medium of Welsh, though enrolments have been increasing since 2006/7.

Patterns and Trends in Participation by Institution, Subject, Qualification Aims, and Credit Values

3.1 Across Wales as a whole, and including enrolments at HEIs of learning which is not itself at a higher education level (labelled ‘further education’ provision¹⁰⁸ in the data), a year on year increase has been experienced in the number of part-time enrolments¹⁰⁹ at Welsh HEIs¹¹⁰ since 2000/01 (Table 1). Between 2000/01 and 2008/09 the number of students enrolling on part-time courses across Welsh HEIs increased from 51,175 to 74,470 per annum respectively.

3.2 As a proportion of all Welsh HEI enrolments the importance of part-time enrolments has increased over the last ten years or so – from 44% in 2000/01 to 47% by 2008/09, but this growth has stabilised over the last three years or so.

Table 1: Enrolments (all year) at Welsh HEIs¹¹¹ by mode of study¹¹²

	2000/01	2000/02	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09
Part-time	51,175	56,345	59,550	61,215	63,750	65,115	68,825	73,980	74,470
Full-time	66,195	67,890	70,855	72,415	74,025	75,320	78,350	79,585	82,555
All	117,370	124,235	130,405	133,630	137,775	140,435	147,175	153,570	157,025
PT as % of all	44%	45%	46%	46%	46%	46%	47%	48%	47%

Source: HESA

¹⁰⁸ In this Section we use ‘higher education’ and ‘further education’ to refer to the level (or qualification aim) of study and HE and FE to refer to the type of provider responsible for delivering the learning.

¹⁰⁹ Part-time students are those recorded as studying part-time, or studying full-time on courses lasting less than 24 weeks, on block release, or studying during the evenings only. Part-time students in this table are those studying at all levels - Postgraduate, undergraduate and further education levels.

¹¹⁰ Including the OUiW

¹¹¹ Including the OUiW

¹¹² From 2007/08, the way in which data on Welsh for Adults (FE) learners and enrolments were collected changed. This means that several thousand FE learners in Wales who would have been reported elsewhere previously are now reported to HESA by the five Welsh HEIs who act as regional centres for Welsh for Adults provision. For this reason pre 2007/08 data are not strictly comparable with that from 2007/08 onwards.

- 3.3 However, the number of part-time enrolments (as a proportion of all enrolments at Welsh HE institutions) varies significantly between Welsh HEIs (Table 2). The disparity in size between different HEIs also means that some of the HEIs with average or below average rates of part-time enrolment are nevertheless major contributors to the part-time student population in terms of absolute numbers.
- 3.4 Over the last three years the largest HEI provider of part-time provision by far has been Glamorgan (though as can be seen below, this is partly because of a significant amount of provision of further education) and although there has been a slight drop in the number of part-time learners studying at the Institution between 2007/08 and 2008/09, it still accounted for 12,055 part-time learners during 2008/2009. Bangor, Cardiff and Swansea are also key players in terms of part-time provision – and although Cardiff experienced a drop in the number and proportion of part-time learners between 2006/07 and 2007/08 it managed to regain similar numbers by 2008/09. Both Bangor and Swansea have experienced significant increases in the number of part-time learners at their institutions over the last three years (from 6,710 in 2006/07 to 9,390 by 2008/09 at Bangor and from 4,835 to 8,810 at Swansea), though a significant proportion of this is likely to be accounted for by Welsh for Adults provision being included with HESA data from 2007/8 on (see below).
- 3.5 Apart from the OUiW, the HEI with the greatest *proportion* of part-time enrolments (although lower than previous years) is Lampeter (at 71% of all enrolments at that institution during 2008/09) followed by Glyndŵr and Newport. However, the proportion of part-time enrolments has been falling at all these HEIs over the last three years. Indeed, all the HEIs with the highest rates of part-time enrolments in 2006/07 have seen a fall with the exception of Bangor (which may again be linked to the Welsh for Adults issue).

3.6 Across Welsh HEIs, UWIC and Cardiff have the lowest proportion of part-time enrolments. The relatively poor showing by the former is a surprise given its strong focus on vocational subjects and links with industry.

Table 2: Part-time¹¹³ Enrolments (all year) at Welsh HEIs by institution

	2006/07 (No)	2006/07 (% of all enrolments)	2007/08 (No)	2007/08 (% of all enrolments)	2008/09 (No)	2008/09 (% of all enrolments)
University of Wales, Newport	5,920	61%	5,415	58%	5,240	56%
Glyndŵr University	4,720	64%	4,505	62%	4,740	61%
University of Wales Institute, Cardiff	2,415	23%	2,040	20%	2,610	23%
University of Glamorgan	13,025	51%	13,535	49%	12,055	47%
Swansea Metropolitan University	2,155	37%	2,110	37%	2,230	37%
Trinity College, Carmarthen	1,095	45%	940	42%	1,105	47%
The University of Wales, Lampeter	6,710	82%	6,410	81%	4,390	71%
Aberystwyth University	4,640	40%	6,460	49%	6,465	47%
Bangor University	6,715	48%	8,580	52%	9,390	53%
Cardiff University	9,950	33%	8,810	31%	9,965	33%
Swansea University	4,835	32%	8,065	44%	8,180	44%
All Welsh HEIs	62,260	44%	66,880	46%	66,375	45%
The Open University	6,565	100%	7,100	100%	8,095	100%
Total (Welsh HEIs and the OU)	68,825	47%	73,980	48%	74,470	47%

Source: HESA

3.7 Patterns both over time and between HEIs look rather different when considered from the perspective of the level or qualification aim of learning provided by Welsh HEIs (Table 3).

3.8 Most of the part-time provision at Welsh HEIs is at higher education level – either undergraduate or postgraduate: this has in the past generally accounted for 84% or more of part-time enrolments at Welsh HEIs.

3.9 However in very recent years the importance of further education¹¹⁴ has increased: by 2008/09 it accounted for a more than a quarter (28%) of all Welsh HEI enrolments and that the increase in enrolments for these courses has masked a decline in absolute numbers in enrolments in

¹¹³ Defined as non full-time enrolments

¹¹⁴ Further Education students are those students on programmes of study for which the level of instruction is equal or below that of level 3 of the National Qualifications Framework, i.e. courses leading to GCE A-levels, VCE A-levels or SQA Advanced Highers/Highers.

higher education courses in the three years between 2006/07 and 2008/09 (Table 3).

3.10 The recent increase in part-time further education-level enrolments is largely attributable to a change in the way in which data on Welsh for Adults learners and enrolments is collected. This means that several thousand learners in Wales who would have been reported elsewhere previously are now reported to HESA by the five Welsh HEIs who act as regional centres for Welsh for Adults provision.

3.11 Part-time enrolments generally account for the large majority of all further education enrolments at Welsh HEIs (93% during 2007/08). In the case of three Welsh HEIs (Aberystwyth, Swansea and Cardiff) part-time places account for all of their further education provision¹¹⁵.

Table 3: Part-time Enrolments (all year) at Welsh HEIs¹¹⁶ by level of study

	2000/01	2000/02	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09
Higher Education (Actual)	44,795	49,510	52,445	53,150	56,485	56,915	57,620	54,430	53,580
Higher Education (%)	88%	88%	88%	87%	87%	87%	84%	74%	72%
Further Education (Actual)	6,380	6,835	7,105	8,065	7,265	8,200	11,210	19,555	20,890
Further Education (%)	12%	12%	12%	13%	13%	13%	16%	26%	28%

3.12 Higher education level enrolments (both postgraduate and undergraduate) at Welsh HEIs generally saw an increase in actual terms over the first half of the last decade, with postgraduate enrolments peaking at 13,565 in 2006/07 and undergraduate enrolments peaking at 44,985 in 2004/05 (Table 4). Since then the number of enrolments for part-time higher education has dropped, with undergraduate enrolments continuing to drop year on year since 2006/07. The decrease in the

¹¹⁵ See Table 5.

¹¹⁶ Including the OUiW

number of postgraduate enrolments between 2006/07 and 2007/08 may be due to a change in HESA definitions.

3.13 Although a very recent increase in the number of part-time postgraduate students was seen between 2007/08 and 2008/09 the total number of part-time higher education learners is still some 4,000 lower than the peak in 2006/07.

3.14 Undergraduate enrolments account for the majority of part-time higher education HEI enrolments (at 75% in 2008/09), and whilst the proportion has not changed significantly, it is somewhat lower than for previous years, reflecting the fact that postgraduate enrolments have risen while undergraduate enrolments have fallen.

3.15 Part-time undergraduate enrolments account for just over a third (at 37% in 2008/09) of all undergraduate enrolments at Welsh HEIs, although this means that, in terms of full-time equivalents, full-time study remains very much the 'norm' at undergraduate level. Part-time postgraduate enrolments account for just over half (52% in 2008/09) of all postgraduate enrolments at Welsh HEIs.

*Table 4: Part-time Higher Education Enrolments (all year) at Welsh HEIs by qualification aim*¹¹⁷

	2000/01	2000/02	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09
Postgraduate	10,055	10,510	11,100	11,545	11,500	12,175	13,565	12,440	13,535
Postgraduate (%)	22%	21%	21%	22%	20%	21%	21%	23%	25%
Undergraduate	34,740	39,000	41,345	41,600	44,985	44,740	44,055	41,985	40,045
Undergraduate (%)	78%	79%	79%	78%	80%	79%	79%	77%	75%

Source: HESA

3.16 At a UK level, '*Patterns of higher education institutions in the UK*'¹¹⁸ reinforces this trend, finding that across the UK, undergraduate

¹¹⁷ Including the OUIW

¹¹⁸ Taken from a report by Professor Brian Ramsden on behalf of the Longer Term Strategy Group of Universities UK. This ninth edition of *Patterns of higher education institutions in the UK* is supported by the UK Higher Education Europe Unit based at Universities UK.

enrolments in HEIs increased by 25% overall in the 10-year period between 1998/99 and 2007/08. It goes on to comment that there has been a *'noticeable greater increase in the number of part-time enrolments (especially in Scotland and Wales) than full-time enrolments at undergraduate level over the last 10 years'*. However, this trend in part-time enrolments was slightly reversed at the UK in 2007/08 as it was in Wales at the same time.

- 3.17 Looked at by HEI (Table 5), removing further education provision alters the 'ranking' of different HEIs, with the OUiW accounting for the largest number of part-time undergraduate enrolments (having in recent years experienced a significant growth in the number of enrolments), in total nearly 19% of all such enrolments, followed by Glamorgan (16%), Glyndŵr (11%) and Newport (10%). These four HEIs thus account for nearly 60% of all undergraduate part-time provision.
- 3.18 However, apart from the OUiW, Lampeter has the greatest proportion of part-time undergraduate enrolments (at 77%) followed by Glyndŵr and Newport.
- 3.19 The establishments with the greatest proportion of postgraduates who are part-time are Newport, UWIC and Glamorgan, although in absolute terms, Cardiff has a significantly larger number of part-time enrolments at this level. Interestingly Swansea and Bangor have the lowest proportions of part-time enrolments at both undergraduate and postgraduate level, suggesting their strong performance in the headline numbers of part-time enrolments is fuelled by their strong presence in further education or community provision. In this context, over two-third of Bangor's and over half of Swansea and Aberystwyth's part-time enrolments were at further education level.

Table 5: Part-time¹¹⁹ Enrolments (all year) by Welsh HEIs by institution and Mode (2008/09)

	Postgraduate		Undergraduate		Further Education	
	Number of p.t. enrolments	%of all postgrad enrolments	Number	% of all undergrad enrolments	Number	% of all FE enrolments
University of Wales, Newport	1,090	64%	4,075	55%	75	32%
Glyndŵr University	465	51%	4,275	63%	*	*
University of Wales Institute, Cardiff	1,785	59%	825	10%	10	8%
University of Glamorgan	1,925	59%	6,435	36%	3,695	76%
Swansea Metropolitan University	660	57%	1,520	32%	50	32%
Trinity College, Carmarthen	110	43%	995	48%	*	*
The University of Wales, Lampeter	655	50%	3,735	77%	*	*
Aberystwyth University	800	44%	2,135	25%	3,525	100%
Bangor University	1,000	42%	1,855	21%	6,535	98%
Cardiff University	3,805	50%	4,085	20%	2,070	100%
Swansea University	730	34%	2,530	21%	4,925	100%
All Welsh HEIs	13,020	51%	32,465	32%	20,890	93%
The Open University	515	100%	7,580	100%	*	*
Total (Welsh HEIs and the OU)	13,535	52%	40,045	37%	20,890	93%

Source: HESA

*The data item is disclosive or not sufficiently robust for publication

3.20 Turning to gender, women are more actively engaged in part-time study at Welsh HEIs than men (in common with UK wide data) and this has been the trend for some time (Table 6). The proportion of women engaged in part-time study at Welsh HEIs has increased slightly over the last decade. For example the proportion of women engaged in part-time study (at Welsh HEIs and the OUIW) as a proportion of all part-time students increased marginally from 58% in 2000/01, to 60% by 2003/04 and reached its peak at 62% during 2007/08. In comparison the proportion of women engaged in full-time study is lower - at 52% in 2007/08 for example – though women are still a majority.

3.21 Of all female enrolments at HEIs during 2008/09 in Wales, just over half were for part-time study (51%) which represented a slight increase on the 2007/08 percentage of 49%. In comparison of all male enrolments at HEIs in Wales, only 43% were for part-time study (again a slight increase on the 2007/08 proportion of 41%).

¹¹⁹ Defined as non full-time enrolments

3.22 The gender split studying part-time across Welsh HEIs varies significantly – at Trinity, for example, 82% of all part-time enrolments during 2008/09 were made by women (a higher proportion than for full-time enrolments) whereas this proportion dropped to 44% at Glyndŵr (a lower proportion than for full-time enrolments).

Table 6: Part-time¹²⁰ Enrolments (all year) at Welsh HEIs by institution and gender

	2007/08 Male	2007/08 Female	2008/09 Male	2008/09 Female
University of Wales, Newport	2,040 (38%)	3,375(62%)	1,955(37%)	3,285 (63%)
Glyndŵr University	2,410 (53%)	2,100 (47%)	2,635(56%)	2,105(44%)
University of Wales Institute, Cardiff	1,125 (55%)	915 (45%)	1,505(47%)	1,710(53%)
University of Glamorgan	5,440 (40%)	8,090 (60%)	5,060(42%)	6,990(58%)
Swansea Metropolitan University	925 (44%)	1,185 (66%)	925(41%)	1,305(59%)
Trinity College, Carmarthen	175 (19%)	765 (81%)	200(18%)	905(82%)
The University of Wales, Lampeter	2,370 (37%)	1,040 (63%)	1,835(42%)	2,560(58%)
Aberystwyth University	2,090 (33%)	4,370 (67%)	2,000(31%)	4,465(69%)
Bangor University	2,770(32%)	5,785 (68%)	3,060(33%)	6,330(67%)
Cardiff University	3,375(38%)	5,435 (62%)	3,735(38%)	6,230(62%)
Swansea University	2,470 (31%)	5,595 (69%)	2,490(30%)	5,690(70%)
All Welsh HEIs	25,195 (38%)	41,650 (62%)	25,395(38%)	40,980(62%)
The Open University	2,965 (42%)	4,135 (58%)	3,290(41%)	4,800(59%)
Total (Welsh HEIs and the OU)	28,165 (38%)	45,785 (62%)	28,685(39%)	45,780(61%)

Source: HESA

3.23 These variations presumably reflect the differing mix of types of part-time provision (see Section 4) and of different curricula.

3.24 Men are more likely to be involved in part-time higher education study (as opposed to part-time further education study) than women are (with for example some 77% of all part-time male enrolments at HEIs being on higher education courses compared with 69% of all part-time female enrolments in 2008/09). This gap widened very recently in 2007/08 (as between 2000/01 and 2006/07 some 89% of all part-time male enrolments were for higher education study compared with 86% for part-time women enrolments) and appears to be accounted for by the dominance of women in further education provision, not least Welsh for Adults.

¹²⁰ Defined as non full-time enrolments

- 3.25 In terms of domicile, Welsh domiciled students account for a larger proportion of part-time than full-time students at Welsh HEIs, with 66% of all 2008/09 part-time higher education enrolments at Welsh HEIs (excluding the OUiW¹²¹) being of Welsh domicile compared to 49% for full-time higher education enrolments.
- 3.26 The proportion of part-time undergraduate students at Welsh HEIs only (i.e. excluding the OUiW) who are Welsh domiciled is even higher (at 73% compared to 50% for postgraduate enrolments during 2008/09) but this trend is also true for those enrolling on full-time courses.
- 3.27 The proportion of UK domiciled students enrolling on part-time higher education study at Welsh HEIs (excluding the OUiW) is more in line with the proportion doing so on a full-time basis (at 84% compared to 83% during 2008/09) with the proportion of UK domiciled students enrolling for either full or part-time undergraduate study similar (at 92% and 91% respectively). However the proportion of UK domiciled students enrolling on part-time post-graduate courses is much higher at 77% than those doing so for full-time courses (at 46%), where the majority of students are from overseas.
- 3.28 In terms of age, part-time higher education students have an older age profile than their full-time counterparts (Table 7). During 2008/09 over two-thirds (71%) of part-time students at Welsh HEIs were aged between 25 and 59 compared with only 19% of full-time Higher Education students.
- 3.29 Very few part-time students are aged 20 and under (just over 8% in 08/09) compared to just over half of full-time students.

¹²¹ Enrolments for the OU are done by resident postcode, with all enrolments by individuals with Welsh postcodes automatically being enrolled in OUiW. It therefore makes sense to exclude this data.

Table 7: 2008/09 Higher Education Enrolments (all year) at Welsh HEIs¹²² by Age and Mode
Higher Education [2008/09]

	Full-time	Full-time %	Part-time	Part-time %	All	All %
Under 16	0	0%	15	0.03%	15	0.01%
16-18	11,760	15%	1,525	3%	13,285	10%
19-20	30,935	38%	2,550	5%	33,485	25%
21-24	22,920	28%	6,880	13%	29,800	22%
25-39	12,470	15%	20,980	39%	33,450	25%
40-59	2,745	4%	17,220	32%	19,960	15%
60 plus	150	0.3%	4,295	8%	4,445	3%
Unknown Age	10	0.01%	115	0.2%	125	0.1%
All	80,990	100%	53,580	100%	134,565	100%

Source: HESA

3.30 In terms of enrolments from low participation neighbourhoods, 12.4% of young part-time undergraduate entrants and 6.8% of mature¹²³ part-time undergraduate entrants at Welsh HEIs came from low participation neighbourhoods¹²⁴ in 2008/09. The UK had corresponding figures of 13.3% for young entrants and 6.8% for mature entrants. In comparison, 10.2% of young full-time first degree entrants and 12.0% of mature full-time first degree entrants at Welsh HEIs during 2008/09 came from low participation neighbourhoods. Welsh HEIs are therefore recruiting relatively fewer mature 'widening access' students on to part-time courses than they are to full-time courses.

3.31 Data made available on the number of part-time undergraduate fee waiver scheme shows that 2,122 students were supported via Welsh HEIs during 2008/09 (Table 8). Apart from the OUiW, the HEIs with the greatest number of students to benefit from the fee waiver scheme were Newport followed by Swansea and Lampeter. It is important to note that some of the HEIs with quite high proportions of part-time learners nevertheless have low numbers benefiting from the Fee Waiver. This is likely to reflect the 'mix' of different types of part-time provision, with some post-92 HEIs having a strong focus on work-related learning and

¹²² Including the OUiW

¹²³ Young students are those who are under 21 at 30 September of the academic year in which they are recorded as entering the institution and mature students are those who are 21 and over, also at 30 September of the academic year in which they are recorded as entering the institution.

¹²⁴ Low-participation neighbourhoods are defined as wards having participation rates which fall in the bottom 20% of wards ranked according to POLAR definition. This new indicator was introduced in 2007/08.

relatively little ‘community education’ – type provision, and some of the more traditional HEIs having quite a strong presence in terms of providing community-based provision.

Table 8: Fee Waiver Scheme

	2008/2009 Number of students supported by fee waiver scheme
University of Wales, Newport	300
Glyndŵr University	6
University of Wales Institute, Cardiff	25
University of Glamorgan	43
Swansea Metropolitan University	24
Trinity College, Carmarthen	35
The University of Wales, Lampeter	241
Aberystwyth University	90
Bangor University	174
Cardiff University	210
Swansea University	249
All Welsh HEIs	1397
The Open University	725
Total (Welsh HEIs and the OU)	2122

Source: HEFCW

3.32 In terms of disability, during 2008/09 some 3,905 part-time higher education students had a known disability, a proportion of 7.3% of all part-time higher education students (Table 9). This proportion is slightly higher than previous years (for example during 2006/07 it was only 6.7%). Part-time higher education students at Welsh HEIs are less likely to have a known disability in comparison with full-time higher education students (at 8.5%).

3.33 A higher proportion of part-time female students have a known disability compared to their male counterparts whilst a lower proportion of full-time female students have a known disability compared to their male equivalents.

Table 9: Higher Education Enrolments (all year) at Welsh HEIs¹²⁵ by Disability

	Full-time 2008/09		Part-time 2008/09		All 2008/09	
	Number	As a % of all full-time	Number	As a % of all part- time	Number	As a% of all
Female with known disability	3,530	8.2%	2,425	7.7%	5,955	8.0%
Male with known disability	3,345	8.9%	1,475	6.7%	4,820	7.5%
All known disability	6,875	8.5%	3,905	7.3%	10,775	8.0%

3.34 In terms of subject studied (Table 10), the subjects with the greatest number of part-time higher education enrolments across Welsh HEIs have traditionally been those of Languages, Education, Business and Administrative studies and Social Studies: this is in contrast to the UK wide position (See Section 2 above). A recent trend between 2007/08 and 2008/09 has been a drop in the number of part-time Languages and Social Studies students and an increase in part-time Business and Administrative studies students. (However it is important to note that the decreases may be linked to a substantial increase in part-time Combination subject learners which may well include Language and Social Studies subjects).

3.35 The four subjects of Languages, Education, Business and Administrative studies and Social Studies together accounted for 24,115 enrolments during 2008/2009 (or 45% of all part-time higher education enrolments). This compares with a proportion of 54% during 2007/08 and 50% during 2006/07.

3.36 It is noticeable that two subject areas experienced a sharp drop in the number of part-time enrolments between 2006/07 and 2008/09 – these being Historical and Philosophical Studies and the Creative Arts and Design.

¹²⁵ Including the OU

3.37 As well as accounting for a large share of all part-time enrolments, the four subject areas of Languages, Education, Business and Administrative studies and Social Studies are also ones where a high proportion of all enrolments are for part-time study (at 39% or over in each case), suggesting that students in these subjects had a higher than average propensity to study part-time. Other subjects (notably combined subjects, architecture, building and planning as well as subjects allied to medicine) also have similarly high proportions of part-time enrolments. This compares with other subjects such as Creative Arts and Design, physical sciences, biological sciences and law where the proportion of part-time higher education enrolments was very low – at 14% or lower during 2008/09.

Table 10: Part-time Higher Education Enrolments (all year) at Welsh HEIs¹²⁶ by subject

	Part-time 06/07		Part-time 07/08		Part-time 08/09	
	Number	As a % of subject enrolments	Number	As a % of subject enrolments	Number	As a % of subject enrolments
Medicine & Dentistry	1,560	41%	1,430	39%	1,710	41%
Subjects allied to medicine	5,500	42%	4,925	40%	5,270	42%
Biological sciences	1,670	16%	1,225	12%	1,495	14%
Veterinary science	*	*	*	*	*	*
Agriculture & related subjects	355	30%	285	24%	300	25%
Physical sciences	590	13%	510	11%	710	14%
Mathematical sciences	230	21%	210	19%	265	21%
Computer science	1,685	34%	1,570	32%	1,250	26%
Engineering & technology	2,910	36%	3,010	37%	2,910	36%
Architecture, building & planning	1,025	43%	1,015	42%	1,175	43%
Social studies	6,120	49%	6,550	52%	4,720	43%
Law	830	18%	645	14%	610	14%
Business & administrative studies	7,485	44%	6,895	41%	7,145	39%
Mass communications & documentation	910	31%	785	28%	895	29%
Languages	7,545	59%	8,250	60%	4,485	46%
Historical and philosophical studies	4,095	52%	2,840	43%	2,785	42%
Creative arts & design	2,215	23%	1,205	14%	1,090	12%
Education	7,530	61%	7,540	61%	7,765	61%
Combined	5,360	95%	5,535	95%	8,990	97%
All Subjects	57,620	43%	54,430	41%	53,580	40%

Source: HESA

¹²⁶ Including the Open University

3.38 Finally, turning to credit values, an analysis of HESA data shows that the average credit values being awarded to part-time higher education learners have dropped overall over the last decade (Table 11): total credit remained fairly static at some 2.6 million between 2001/02 and 2003/04 before dropping to some 2.3 million by 2004/05. It remained at this rate until 2008/09 when it increased sharply to 2.5 million. Interestingly, this pattern is almost the inverse of the trends in terms of the number of part-time enrolments where numbers increased in the period before 2007/08 and then fell in 2008/09. (see Charts 1 and 2)

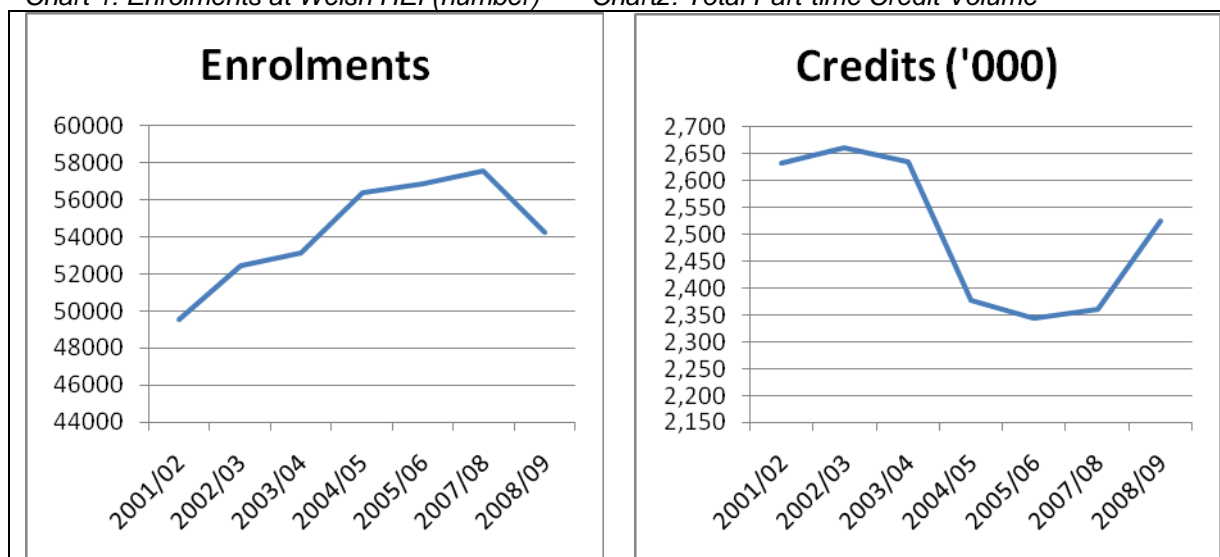
Table 11: Higher Education enrolments, FTE and credit values (including OUiW)¹²⁷

	2001/02	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09
Enrolments	49,512	52,446	53,136	56,418	56,915	57,578	54,259	??
FTE	17,913	18,425	18,458	17,857	17,177	17,899	18,947	??
Credit Values (,000)	2,631	2,660	2,635	2,378	2,345	2,362	2,525	??
Average credit value per enrolment	53	51	50	42	41	41	47	??

Source: HESA student and module records

Chart 1: Enrolments at Welsh HEI (number)

Chart2: Total Part-time Credit Volume



3.39 This implies that the expansion of part-time student numbers in the mid-2000s was associated with a fall in the intensity of study whereas in

¹²⁷ Not all institutions accurately returned all credit values before 2001/02 and so credit value figures for 1998/99 to 2000/01 should not be considered complete)

2007/08, the fall in numbers of enrolments was associated with a falling back of the numbers of students following relatively low credit value courses.

3.40 Part-time learners during 2007/08 were therefore studying more intensive courses than during the previous three years (an average of 47 credits per student enrolled compared with 41 and 42 for the three previous years) but this was lower than at the start of the decade (when average credit values per enrolment were in the 50s).

3.41 Part-time undergraduate students obtained on average 42 credits during 2007/08 – this varied from institution to institution with for example SMU achieving a high average of 81 credit values per enrolled part-time student, followed by the OUiW, UWIC and Newport (all at 63 credits per enrolled part-time undergraduate). On the other hand Institutions such as Lampeter and Aberystwyth had much lower averages (at 16 and 24 credit value per part-time undergraduate student respectively).

Patterns and Trends in the Availability of Different Modes of Study

3.42 During 2008/09, and excluding the OUiW, some 12% of all part-time HEI students enrolled at Welsh HEIs were distance learning based students (although data is only available for some two-thirds of all HE part-time students). The remaining 88% were based either at the returning HE institution or a franchised institution (Table 12).

Table 12: Part-time students by location of study (2008/09)

	All Students at Welsh HEIs	Welsh Domiciled Students
<i>Postgraduate</i>		
Distance Learning – UK based student	2,355	1,550
Other	*	*
At returning and /or franchised institution for whole year	10,665	8,605
All	13,020	10,160
<i>Undergraduate</i>		
Distance Learning – UK based student	3,190	9,240
Other	*	*
At returning and/or franchised institution for whole year	29,275	24,990
All	32,465	34,230
<i>All Levels</i>		
Distance Learning – UK based student	5,445	10,790
Other	*	5
At returning and/or franchised institution for whole year	39,940	33,595
All	45,485	44,390

Source: HESA

Data less than 3 are shown as *. All other data are rounded to the nearest 5.

3.43 The proportion of part-time postgraduate students involved in distance learning is higher (at 18%) than for part-time undergraduate students (at 10%).

3.44 Interestingly, this trend was reversed when looking at the profile of Welsh domiciled students (across all HEIs in the UK) – some 27% of part-time under-graduate students were distance learning based compared with some 15% of part-time postgraduates. This suggests that there is to some extent a net ‘outflow’ of Welsh-domiciled part-time undergraduates using distance learning, in contrast to the overall position with regard to part-time undergraduate study where Welsh HEIs are providing more places than are taken up by Welsh domiciled students. The relatively low proportion of part-time students studying by distance learning within Wales perhaps suggests that Welsh HEIs are somewhat off the pace in this regard, with Welsh domiciled students disproportionately likely to look elsewhere for part-time distance learning provision.

3.45 In terms of franchised provision, HESA data for 2008/09 shows that some 14% of part time higher education provision and 34% of part time further education (most of it believed to be Welsh for Adults) at Welsh

HEIs was made available through franchise arrangements, mostly via Welsh FEIs (Table 13).

- 3.46 The University of Glamorgan, followed by the University of Wales, Newport are the two HEIs with the largest number of part time franchised based higher education students, at 2,265 and 1,650 students respectively.
- 3.47 Newport has the highest proportion of part time higher education students studying on a franchised basis (at 32%), followed by UWIC (at 31%).
- 3.48 Three Institutions (namely Trinity, Cardiff and Swansea) have no part time higher education franchised provision.
- 3.49 Only two Institutions (Bangor and Swansea) were reported to have any part-time further education franchised provision available during 2008/09 and these can mostly be accounted for by Welsh for Adults provision.

Table 13: Part Time Students at Welsh HEIs by franchised status and mode 2008/09¹²⁸¹²⁹

	HE			FE		
	Franchised	Non Franchised	All	Franchised	Non Franchised	All
University of Wales, Newport	1,650	3,525	5,175	0	75	75
Glyndŵr University	530	4,315	4,845	0	0	0
University of Wales Institute, Cardiff	810	1,830	2,645	0	10	10
University of Glamorgan	2,265	6,095	8,360	0	3,695	3,695
Swansea Metropolitan University	11	2,180	2,190	0	50	50
Trinity College, Carmarthen	0	1,105	1,105	0	0	0
The University of Wales, Lampeter	840	3,710	4,550	0	0	0
Aberystwyth University	40	2,895	2,935	0	3,525	3,525
Bangor University	65	2,795	2,860	4,415	2,120	6,535
Cardiff University	0	7,895	7,895	0	2,070	2,070
Swansea University	0	3,255	3,255	2,775	2,150	4,925
Total (Welsh HEIs)	6,215	39,600	45,815	7,190	13,700	20,890

Source: HESA

3.50 The latest Higher Education Business and Community Interactions

(HEBCIS) Survey for 2007/08 provides information on the type of courses made available by HEIs to employers and the general public.

Table 14 (over) shows that, amongst other things, that all 11 HEIs (excluding OUIW) provide short bespoke courses for business on campus but that only seven do so at companies' premises. Cardiff provided the narrowest range of modes of delivery.

3.51 The HEBCIS data also shows that Welsh HEIs have been able to significantly increase the income that they receive from delivering CPD and Continuing Education courses over the last few years – from £3.6m in 2001/02 to £43.8m in 2007/08. This income represents some 6% of UK HEIs income from these activities in 2007/08, compared with only 2% in 2001/02.

¹²⁸ Data less than 3 are shown as 0, all other data are rounded to the nearest 5.

¹²⁹ If a student is studying more than one course which have different franchised status then this student is counted in each category. Therefore the totals shown in this table may not match those provided elsewhere.

Table 14: Mode of courses made available by HEIs

	Distance learning for businesses	Continuous work-based learning	Short bespoke courses for business on campus	Short bespoke courses at companies' premises	Extra-mural courses for the public
Aberystwyth University	√	√	√	No	√
Bangor University	√	√	√	√	√
Cardiff University	No	No	√	No	No
University of Wales Institute, Cardiff	√	√	√	√	√
University of Glamorgan	√	√	√	√	√
Glyndŵr University	√	√	√	√	√
University of Wales, Lampeter	√	√	√	No	√
University of Wales, Newport	√	√	√	√	√
Swansea University	√	√	√	No	√
Swansea Metropolitan University	No	√	√	√	√
Trinity University College	√	√	√	√	√

Source: HEBCIS Survey 2007/2008

3.52 In addition to the part-time learners enrolled at Welsh HEIs, a further 4,660 learners were studying part-time at higher education level at Welsh FEIs during 2008/09 (Table 15). These included some 850 learners who were pursuing work-based learning opportunities. These learners would not have been accounted for within the HESA data presented by HEIs¹³⁰. The key FE institutions which account for the greatest number of part-time HE learners are Coleg Llandrillo and Deeside College followed by Yale College.

¹³⁰ *Further Education, Work-based Learning and Community Learning in Wales Statistics 2007/08 Statistics for Wales, Welsh Assembly Government*

Table 15: Number of part-time HE learners enrolled at FE institutions

Institution	2007/08		2008/09 (Provisional Data)	
	Learners with HE level highest qualification pursued	Work-based Learners with HE level highest qualification pursued	Learners with HE level highest qualification pursued	Work-based Learners with HE level highest qualification pursued
Barry College	135	100	105	105
Bridgend College	80	*	55	*
Coleg Sir Gar	240	80	255	60
Coleg Ceredigion	40	30	40	30
Deeside College	550	105	630	200
Coleg Glan Hafren	200	5	185	*
Corseionon College	25	25	30	20
Coleg Gwent	220	15	150	*
Coleg Llandrillo	835	145	755	170
Coleg Llysfasi	110	105	120	70
Coleg Meirion Dwyfor	60	*	145	*
Pembrokeshire College	220	**	170	**
Merthyr Tydfil College WBL	**	0	**	*
Coleg Morgannwg	55	15	80	0
Coleg Powys	65	*	80	0
St David's Catholic College	0	**	0	**
Swansea College	205	130	170	85
Welsh College of Horticulture	140	50	165	*
Yale College	370	15	280	55
Ystrad Mynach College	95	25	75	10
WEA South	0	**	15	**
YMCA	0	**	0	**
Coleg Menai	145	*	115	0
Neath Port Talbot College	180	65	185	35
Coleg Harlech /WEA (North)	0	**	0	**
Total (including any multiple counting between providers)	3,965	960	3,810	850

* Numbers greater than 0 and less than 5 have been replaced by *. Other figures are rounded to the nearest 5.

** No entry available from LLWR

Patterns and Trends in Completion Rates, Student Destinations and Satisfaction

3.53 Part time undergraduate entrants to Welsh HEIs are more likely than the UK average to continue their studies beyond their first year. 29.9% of part-time undergraduate entrants to Welsh HEIs in 2007/08 who were aged 30 or under did not continue beyond their first year. This is lower than the UK rate of 36.9%. A similar proportion of those aged over 30 did not continue beyond their first year (at 30.1%) compared with 33.9% for the UK. Having said this (as is the case across the UK) part time undergraduate entrants to Welsh HEIs are less likely than their full time counterparts to continue their studies beyond their first year – with for example, 7.4% of young full-time first-degree entrants and 20.1% of

young full-time other undergraduate entrants to Welsh HEIs in 2007/08 not continuing beyond their first year.

3.54 The data available for modules which are passed by part-time undergraduate students shows that across Welsh HEIs during 2008/09 80.3% of modules were passed. This compares to a slightly higher proportion, at 85%, during 2007/08. Pass rates varied across Welsh HEIs and 2007/08 data (Table 16) shows that SMU, Lampeter and Glyndŵr boast the highest pass rates whilst Bangor had a much lower pass rate than average (at 37.1%).

3.55 On average in 2007/08, each part-time undergraduate student undertook 2.5 modules and each module was worth on average 14% of annual full-time equivalent study (reflecting the fact that the average part-time student was studying for the equivalent of 42 credits). Again, this varied from one institution to another – SMU and UWIC had the highest proportion of modules per student (at 4.8 and 4.0 respectively) whilst each module was worth on average 16.5% of annual full-time equivalent study at both Glyndŵr and Cardiff.

Table 16: Module completion rates: Part-time undergraduates 2007/08

	Number of part-time students	Total modules	Modules with results (%)	Modules passed	Module per student	FTE per module (%)
University of Wales, Newport	4,345	14,725	86.4	84.8	3.4	15.0
Glyndŵr University	2,555	6,965	81.2	90.0	2.7	16.5
University of Wales Institute, Cardiff	820	3,250	88.4	93.4	4.0	13.2
University of Glamorgan	6,685	15,459	85.2	82.0	2.3	15.7
Swansea Metropolitan University	1,400	6,677	4.3	99.6	4.8	13.4
Trinity College, Carmarthen	845	1,943	84.2	83.0	2.3	13.5
The University of Wales, Lampeter	1,970	5,238	59.5	98.3	2.7	12.6
Aberystwyth University	1,885	3,296	82.9	89.0	1.8	10.9
Bangor University	1,820	3,138	24.8	37.1	1.7	15.3
Cardiff University	3,745	4,867	90.0	85.9	1.3	16.5
Swansea University	2,720	5,374	93.7	79.5	2.0	6.1
All Welsh HEIs	28,785	70,932	73.8	85.1	2.5	14.1

Source: HESA

3.56 In terms of destinations, HESA's Destinations of Leavers from Higher Education (DLHE) survey shows that three-quarters of both Welsh domiciled qualifiers (76%) and qualifiers from Welsh HEIs (74%) had entered work of some kind (2007/08 students) (Table 17). 6% of Welsh domiciled and 7% of part-time students from Welsh HEIs were assumed to be unemployed, with the majority of the remainder entering further study. Destinations at six months have shown little change over the last five years.

3.57 Part-time postgraduate qualifiers were most likely to be in work with 88% of those gaining postgraduate qualifications from Welsh HEIs having entered some kind of employment. For undergraduates, part-time qualifiers were more likely to enter work than full-time qualifiers. Perhaps this is not surprising given the fact that many part-time students would have been in employment while studying.

Table 17: Destinations of students - Percentage of qualifiers by activity and mode of study, 2007/08

	Qualifiers from Welsh HEIs ¹³¹				Welsh domiciled qualifiers ¹³²			
	Work only	Work & Study	Study only	Assumed Unemployed	Work only	Work & Study	Study only	Assumed Unemployed
Full-Time								
Postgraduate	81	5	5	5	80	6	7	4
First-degree	62	8	16	8	63	8	16	8
Other undergraduate	43	13	33	4	46	14	32	4
Part-time								
Postgraduate	74	14	5	3	74	16	5	2
First-degree	71	18	3	3	65	19	5	3
Other undergraduate	61	27	5	2	61	27	6	2
All								
Postgraduate	78	9	5	4	78	10	6	3
First-degree	62	9	16	8	63	9	15	8
Other Undergraduate	54	21	17	3	55	22	17	3
All levels	64	11	14	7	65	11	13	6

Source: 'Destinations of students gaining qualifications from Higher Education Institutions: Wales 2007/08' Statistics for Wales Statistical Bulletin taken from the Higher Education Statistics Agency's (HESA) Destinations of Leavers from Higher Education (DLHE) survey.

3.58 In terms of the type of job that part-time students obtain, the DLHE suggests that employed qualifiers from part-time study were more likely to be in permanent employment (95%) than those from full-time study (just under 80%), and less likely to be in temporary employment (just under 5%) (Table 18). This was also true for Welsh domiciled qualifiers.

¹³¹ Qualifiers do not include those who did not respond or those who replied to the survey but explicitly refused to give information. Percentages do not add up to 100 since 'Not available for Employment' and 'Other' are not shown.

¹³² Qualifiers do not include those who did not respond or those who replied to the survey but explicitly refused to give information. Percentages do not add up to 100 since 'Not available for Employment' and 'Other' are not shown.

Table 18: Percentage of qualifiers in full-time paid employment by nature of employment (2007/08) ¹³³

	Qualifiers from Welsh HEIs ¹³⁴				Welsh domiciled qualifiers ¹³⁵			
	Permanent ¹³⁶	Temporary ¹³⁷	Self employed or other		Permanent(b)	Temporary(c)	Self-employed or other	
Full-Time								
Postgraduate	73	26	1		75	24	1	
First-degree	78	20	2		80	18	2	
Other undergraduate	78	19	4		78	19	3	
Part-time								
Postgraduate	94	5	1		97	3	1	
First-degree	97	2	1		96	4	1	
Other undergraduate	95	4	1		95	4	1	
All								
Postgraduate	81	18	1		83	16	1	
First-degree	80	19	2		82	17	2	
Other Undergraduate	90	8	2		91	8	1	
All levels								
All levels	81	17	2		83	15	1	

Source: DLHE

3.59 The median salary for Welsh qualifiers, from full-time first degree programmes, who were employed in the UK was £20,000 (Table 19). The median salary for qualifiers from Welsh HEIs was £19,000. Across the board, qualifiers who had studied part-time were receiving significantly higher salaries (though this might well be a factor of age and employment history).

¹³³ Percentage excludes those who did not answer

¹³⁴ Qualifiers do not include those who did not respond or those who replied to the survey but explicitly refused to give information. Percentages do not add up to 100 since 'Not available for Employment' and 'Other' are not shown.

¹³⁵ Qualifiers do not include those who did not respond or those who replied to the survey but explicitly refused to give information. Percentages do not add up to 100 since 'Not available for Employment' and 'Other' are not shown.

¹³⁶ Includes permanent contracts, pen-ended contracts or fixed-term contract of 12 months or more

¹³⁷ Includes fixed-term contracts of less than 12 months and temporary contracts gained through agencies or otherwise.

Table 19: Median salaries of UK domicile first degree qualifiers in full-time employment in the UK (2007/08) (£s)

	Welsh domicile	Qualifiers from Welsh HEIs	Qualifiers employed in Wales	UK qualifiers
Full-time				
Male	20,000	19,000	17,050	20,000
Female	19,000	18,000	19,000	19,000
Persons	19,000	18,000	18,000	20,000
Part-time				
Male	27,000	28,000	27,000	28,000
Female	24,000	24,000	24,000	24,000
Persons	25,000	25,000	25,000	25,000
All				
Male	20,000	19,000	19,000	20,000
Female	20,000	19,000	19,000	20,000
Persons	20,000	19,000	19,000	20,000

Source: DLHE

3.60 In terms of student satisfaction, the National Student Survey (NSS) has been collecting feedback from students in their final year of a course leading to undergraduate credits or qualifications across the UK. Data from the 2009 Survey has been taken from Unistats.com¹³⁸ which publishes the findings on student satisfaction rates. Care must be taken when analysing this data as information for part-time student satisfaction is only available on 13 courses across six universities (Table 20). Overall satisfaction rates vary from a fairly low 63% to 100% in the case of one course. Having said this it does present a general positive picture when comparing with full-time student satisfaction rates. Where comparable course data is available for full-time students and part-time students, in all but one case the proportion of satisfied part-time students is higher than those of full-time students.

3.61 Satisfaction rates amongst part-time students at the Open University (OU) are generally higher than other Welsh HEIs (although the survey data is based on UK responses). UK level data is available for most of its courses – the level of satisfaction amongst part-time first degree students is at 90% and 84% or higher amongst other undergraduate students.

¹³⁸ Data taken from individual HEI-level searches on the www.Unistats.com in April 2010

Table 20: Proportion of Students Satisfied with Course (2009 NSS Survey)¹³⁹

	Course Title	Proportion of satisfied part-time students	Proportion of satisfied full-time students
Glyndŵr University	Creative Arts and Design	74%	65%
University of Wales Institute, Cardiff	Academic studies in education	81%	78%
	Education	83%	n/a
University of Glamorgan	Engineering and Technology	78%	58%
	Subjects allied to Medicine	93%	90%
	Agriculture and others in veterinary sciences	63%	54%
	Computer Science	80%	n/a
	Other subjects allied to medicine	83%	83%
Aberystwyth University	Information Services	87%	n/a
	Mass Communication and Documentation	87%	94%
Bangor University	Creative Arts and Design	92%	79%
	Fine Art	92%	n/a
Swansea University	History and Archaeology	100%	91% (History) and 96% (Archaeology)

Patterns and Trends in Welsh Medium Provision

3.62 Overall, the proportion of part-time students studying some of their higher education course¹⁴⁰ through the medium of Welsh at HEIs is small (Table 21).

Table 21: Students with some teaching through Welsh by mode of study¹⁴¹

	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09
Full-time	2,265	2,515	2,475	2,735	2,570	2,910
Full-time (as % of all full-time students)	3.1%	3.4%	3.3%	3.5%	3.3%	3.5%
Part-time	1,460	1,180	1,435	1,340	1,880	2,820
Part-time (as % of all part-time students)	3.0%	2.2%	2.6%	2.6%	4.0%	3.8%

3.63 However the proportion of part-time students studying some of their course through Welsh has increased year on year since 2006/07 with 2,820 part-time students (or 3.8% of all part-time students) recorded as

¹³⁹ Data only available for selected part-time First Degrees and Under-graduate Degrees where enough data has been collected - the survey does not collect information from post-graduate students. Not enough data had been collected from part-time students on any courses at five HEI institutions namely Newport, Cardiff, SMU, Trinity or Lampeter.

¹⁴⁰ Defined as those students studying at least one module of teaching through the medium of Welsh.

¹⁴¹ Excluding the Open University

studying some of their course through Welsh in 2008/2009. Although a greater number than 2007/08 the proportion was slightly less than the 4% recorded for the previous year.

3.64 Across all Welsh HEIs during 2008/09, of those students receiving some teaching through the medium of Welsh, 49% were studying part-time and 51% were full-time. Proportionately, part-time students are more likely than full-time students to receive all of their teaching through Welsh – for example during 2007/08 of those students with some Welsh teaching, 62% of part-time students compared with 26% of full-time students received all their teaching through Welsh¹⁴².

3.65 During 2008/09 Lampeter followed by Trinity accounted for the greatest number of part-time students with some teaching through Welsh (at 1,035 and 845 respectively) which represent an increase on the numbers for 2007/08 (being 555 at Lampeter and 515 students at Trinity) (Table 22).

Table 22: Students with some teaching through Welsh by institution 2008/09

	Full-time	Part-time	All modes	All students
University of Wales, Newport	25	220	245	9065
Glyndŵr University	105	190	295	7730
University of Wales Institute, Cardiff	120		120	11045
University of Glamorgan	120	40	160	20900
Swansea Metropolitan University	10		10	5870
Trinity College, Carmarthen	575	845	1420	2345
The University of Wales, Lampeter	30	1035	1065	6160
Aberystwyth University	500	55	555	10210
Bangor University	1140	185	1325	11195
Cardiff University	175	105	280	27940
Swansea University	115	140	255	14015
All Welsh HEIs	2910	2820	5730	126,475

Source: HESA

3.66 Trinity stands out as the institution that has by some distance the largest proportion of part-time students receiving some teaching through Welsh (at 36% in 2008/09 although this proportion is down on the 55% rate of 2007/08).

¹⁴² *Statistical Bulletin: Welsh in Higher Education Institutions, 2007/08 Statistics for Wales 30th June 2009 SB 40/2009 Page 1*

- 3.67 Furthermore it is worth pointing out that Trinity, Lampeter, Newport, Glyndŵr and Swansea had a higher proportion of part-time students (compared to full-time students) with some teaching through Welsh.
- 3.68 Interestingly, whilst Bangor has the second greatest number of all students with some teaching through Welsh (at 1,325 just behind Trinity at 1,420) the large majority of these students are full-time and only a very small proportion study on a part-time basis.
- 3.69 Excluding languages, the most popular subjects with some teaching through Welsh in 2007/08 (for both part-time and full-time students) were education, creative arts and design, and historical and philosophical studies followed by mass communications and documentation and social studies. Interestingly a much higher proportion of part-time students were studying languages with some teaching through Welsh (at 25.2% compared with 6.2% of full-time students). For all other subjects, a lower proportion of part-time students studied the subject with some teaching through the medium of Welsh.

4 DRIVERS OF AND BARRIERS TO PART-TIME PROVISION: FINDINGS FROM THE FIELDWORK

Chapter Summary

The label 'part-time provision' covers a very wide range of different learning opportunities within Welsh HEIs. This includes:

- participation in 'standard' courses offered on either a part-time or full-time basis;
- provision made available exclusively on a part-time basis on campus or at other venues (often related to professional qualifications);
- distance-learning provision on a part-time basis;
- provision tailored to specific employers' needs but where the course has a credit-bearing value and can be used to draw down HEFCW funding;
- bespoke courses which are fully funded by employers;
- community education provision which is at higher education level;
- 'access' or other 'further education' level provision.

Many interviewees believed that Welsh Assembly Government policy could pay greater regard to this diversity and needs to be more explicit in terms of what sort(s) of part-time provision it wishes to encourage. There was also thought to be more clarity needed about the often quite complex relationships between part-time provision and the widening access and employer engagement agendas. At the same time, many interviewees stressed the increasing blurring of the distinction between full- and part-time students given the fact that a majority of the former also work part-time.

There are contrasting views between different Welsh HEIs of the importance of part-time provision, with many regarding it as marginal but others seeing it as fundamental to their Mission. HEIs with high levels of part-time provision generally see their Mission, rather than Government policy, as the key driver of their engagement with this agenda, though (in the past at least) part-time provision has also allowed some HEIs to compensate for low demand from full-time applicants and to generate additional income, particularly where employers are able and willing to part-fund provision.

HEIs generally struggle with the concept of 'latent' or 'unmet' demand, with some arguing that their responsibility is rather to drive demand, particularly from employers.

Overwhelmingly, HEIs see the main barriers to part-time provision as being financial. Since the introduction of variable fees (and the associated Student finance arrangements for full-time students) it has been difficult to generate equivalent income from part-time students, even where employers are funding participation, despite the welcome 'Graham Funding'. With increasing demand for full-time places, and given the ability of HEIs to trade-off full-time against part-time credit volumes, finance directors are generally pushing for a reduced reliance on part-time provision. This is compounded by the fact that there is no equivalent to UCAS for part-time provision, making it more difficult (and expensive) for HEIs to attract applications, while many interviewees argued that not just HEIs but society in general still works to a default position that students are full-time school leavers and organises provision accordingly.

HEIs do not generally have consistent policies on fees for part-time students, and employers are said to be reluctant to pay fees at a realistic level. The costs of part-time provision are generally thought to be higher, because of the 'transactional costs' of enrolling and providing core services to each individual student, the additional costs of recruitment and additional costs for provision and support outside standard hours.

With the obvious exception of the OUiW, Welsh HEIs appear relatively reluctant to invest in distance learning, particularly for undergraduate provision, because of the high start-up costs and issues over quality control. Some HEIs offer a significant volume of provision within community venues, though these are often Institutions where part-time provision as a whole is relatively modest. While some HEIs have quite extensive franchise arrangements with FEIs, these are generally being scaled back. Many HEIs have tried to increase the opening hours of key campus facilities to accommodate the increasingly varied needs of part-time (and full-time students) but for many, these remain less flexible than might be desired.

HEIs struggle to gather meaningful data on longer-term retention rates of part-time students, given the flexibility of such provision, but there is some suggestion that progression between courses is more of an issue than retention within them and that problems with retention are much more clearly related to socio-economic characteristics than to whether provision is part- or full-time.

In terms of the future, while a minority of interviewees believe that demographic and social change will drive HEIs to increase their part-time provision, most argued that part-time provision will continue to come under strong pressure, as HEIs respond to the upswing in applications for full-time places (and the simultaneous freezing or reduction in credit volumes as a result of public expenditure cuts) by prioritising what is essentially the more financially attractive option of shifting the balance of provision towards full-timers. However, the possible introduction of a cap on full-time provision because of student finance pressure is seen as a potential 'game-changer', as is the outcome of the Browne Review of University Funding in England.

What is Meant by Part-time Provision?

4.1 One of the key issues apparent from the fieldwork undertaken with HEIs and other stakeholders was that the blanket term 'part-time' HE covers a

fairly wide range of different provision, which is not obvious from a simple analysis of the data. Broad categories of part-time provision include:

- participation by individual students on a part-time basis on courses which are provided by institutions on both a full-time and a part-time basis and delivered on campus: in this model, a student may participate in teaching alongside full-time students but undertake a smaller proportion of the modules for the course during one academic year;
- provision which is made available exclusively on a part-time basis, mostly on campus or occasionally at employer or community venues and which provides part of professional qualifications or recognised CPD within a profession, for example, courses in Accountancy, courses related to membership of the Chartered Institute of Personnel and Development, or Initial Teacher Training for those teaching in post-compulsory settings; in this model, employers may well fund the fees for individual learners as well as providing some time off for study;
- distance learning on a part-time basis which is intended to provide a full qualification, which is provided to individuals, but where the student's fees may be reimbursed by an employer: this is the model of the vast majority of OU provision;
- provision which is tailored to the needs of employers (whether individual employers or groups of employers) but where the course has a credit bearing value and where employers pay a tuition fee which does not meet the full cost of the course (with the balance being recouped from HEFCW credit funding): in this model, provision may be delivered either on campus or at an employer's premises and there may well be no expectation that the learning will cumulate to a full qualification at degree or Masters level even though the individual modules or units can be accumulated in this way;
- bespoke courses which are developed to meet specific needs of an employer, which are delivered flexibly and which are fully-funded by the employer: these may or may not be credit bearing and learners may

not be formally enrolled with the institution or recorded in the HESA data;

- 'Community Education' provision, delivered on campus or in community venues, which will be credit-bearing and at a higher education level but which may or may not be structured to lead the learner towards achieving a full qualification;
- access and other community provision which though delivered by a HEI (either on campus or in FE or community venues) is not at higher education level and will be funded through DCELLS' National Planning and Funding System: a major element of this is Welsh for Adults provision, the majority of which has been included within the HESA data since 2007/08.

4.2 In addition, and cutting across these loose categories, HE provision may be delivered by franchise arrangements principally with FE colleges, where the teaching is delivered by the franchisee, but the quality assurance and accreditation is provided by a HEI. Under these arrangements, the bulk of the costs are met directly by the FEI and they receive the majority of the HEFCW financial contribution (where applicable) but the HEI takes a 'top-slice' of the fee income. The students are enrolled with the HEI, and where the learning is credit-bearing and not based on full-cost recovery, the students are recorded in the HESA data.

4.3 Moreover, as we have seen in Section 3 above, a relatively small number of HE students, funded by HEFCW are on courses which are delivered solely by FE Colleges under the 'HE in FE' arrangements, although to some extent this was regarded by interviewees as something of an anomaly.

4.4 Finally, one HEI drew attention to the lack of clarity surrounding the status of Foundation Degrees. In the case of this HEI, since a suite of Foundation Degrees were being delivered across a calendar year as

opposed to an academic year, they categorised the courses as part-time even though they involved 120 credit value over the calendar year.

- 4.5 Many of our interviewees believed that the discourse about part-time provision failed to reflect the varied types of, and motivations for part-time learning and was based on loose assumptions about the extent of linkages between part-time learning in general terms and, on the one hand, widening access, or, on the other, responding to employer demand. One stakeholder, for example, believed that ‘there’s a naivety [within Welsh Assembly Government] about the heterogeneity of the part-time market’, while, talking of the variety of types of part-time provision and part-time learner, another believed:

‘This is a level of complexity that for me isn’t understood or recognised within the current system because that system is far too simplistic’.

- 4.6 Another HEI interviewee argued that there was a pressing need for the Welsh Assembly Government and HEFCW to ‘strategise’ part-time learning – to focus more clearly on what it was trying to achieve through part-time provision rather than promote part-time learning *per se*, while another argued that policy makers needed to spell out much more clearly what their priorities were *within* part-time learning. Though several interviewees favoured more active measures on the part of the Welsh Assembly Government and HEFCW to incentivise HEIs to give greater priority to part-time learning, it was felt that any attempt to do so in the absence of clearer thinking on the *intention* behind such measures might end in unintended consequences.
- 4.7 The fieldwork with HEIs was not designed to undertake a detailed mapping of the pattern of part-time provision in terms of curriculum or subject and it was clear that the diversity of types of provision was reflected also in the diversity of courses and learning made available.
- 4.8 However, a common theme (reflected in the data) was that the bulk of what is termed above community education provision was within the arts

and humanities, and with relatively little offered in terms of STEM subjects, with issues of access to relevant equipment and facilities thought to be an issue here.

- 4.9 Similarly, interviewees in some HEIs suggested that the numbers of part-time students on 'dual' full-time/part-time courses tended to be quite low overall, but particularly so in terms of more technical or applied subjects which required access to laboratories or studios.
- 4.10 While employer-driven or employer-related provision appears to be provided in a very wide range of sectors and occupations, from clerics to food technologists, aircraft engineers to counsellors, a number of HEI interviewees suggested that employer-backed training was much more common within the public sector (with strong foci being teaching qualifications and CPD and the health professions, for example). Commenting on this, interviewees tended to see this as a function of the reluctance of private sector employers, particularly SMEs, to contribute to the costs of training, rather than any lack of willingness on the part of the HE sector to engage.
- 4.11 Finally, the fieldwork echoed the findings of the data analysis that Welsh medium part-time provision was very limited, with much of what was offered being delivered by franchised FE partners rather than HEIs themselves.

Part-time Provision and HEIs Mission

- 4.12 The fieldwork (echoing the findings of a previous study for HEFCW on Additional Funding for Part-Time Students) clearly suggested that, despite the high proportion of total enrolments which part-time students represent, there is a wide range of views within Welsh HEIs about the centrality of part-time provision to their missions. While this largely reflects the divide between pre and post-92 HEIs, this distinction is, perhaps beginning to break down.

4.13 Some HEIs were candid in admitting that – even allowing for the variety of part-time provision reflected above – full-time courses were still perceived as the ‘norm’, with part-time provision remaining as something of an afterthought. This is illustrated by a number of comments from different Institutions:

‘[We cannot] disinvest in full-time study and reinvest in part-time study...[which would be] turning off the tap on our overseas market and our future is predicated on substantially increasing overseas income ...as is every HEI in the UK now because of funding cuts’

‘Our main mission is to be a research led and research intensive university’

‘It [part-time provision] is at the periphery of what we do’

‘[We are a] cosmopolitan global institution ...we get half our students from outside Wales ...so one of the concerns I have ...is that we are not in a [local] Community College’

4.14 In some of these HEIs, a significant element of part-time provision was in more traditional ‘community education’, often distinct from the mainstream curriculum of the institution. For other institutions, even where part-time provision was seen as peripheral, it was nevertheless acknowledged as important because ‘having part-time students is part of your entrée into your local environment as well ... you don’t get that with full-time students’.

4.15 By contrast, interviewees in a number of HEIs stressed the centrality of engagement with their local and regional communities as at the core of their Mission:

‘Part-time is what we live and breathe – it is part of our core’

‘The driver... isn’t so much what’s on offer from [Welsh Assembly Government] but we see it as something we’ve just got to do to meet our Mission’

4.16 While some of these HEIs had extensive community programmes, they were also much more likely to have a significant focus on providing professionally-related qualifications and provision tailored to meeting the needs of individual employers.

4.17 From this perspective, and reflecting the diversity of part-time learning considered above, it is important to stress that there was no perfect correlation between the priority attached to part-time provision by HEIs (and their Missions) and their commitment and investment in widening access or delivering at least some provision in deprived communities. Indeed, it is arguable that some of those HEIs where part-time learning is most peripheral are nevertheless most committed to community outreach.

4.18 Despite this, almost all stakeholders (as well as some HEIs) recognised that there was a wide range of attitudes within HEIs and many argued that it was necessary for policy makers to, in turn, differentiate more clearly between HEIs instead of expecting all to have identical missions.

4.19 Thus, one interviewee close to HEIs, argued that there was a contradiction between the desire of the Welsh Assembly Government to be quite prescriptive about what HEIs should deliver and the fact that HEIs were operating in a market, were keen to differentiate themselves within that market and thus were actually quite responsive to changing signals from the market place. This interviewee went on to suggest that, even if it was accepted that more part-time provision was a good thing, it might be better to push for greater part-time provision by those who did it well, rather than push all HEIs to make more part-time provision available.

4.20 This was echoed by a number of policy stakeholders, who felt Welsh Assembly Government policy was already moving in this direction, and was increasingly focused not on asking each HEI to deliver research excellence, high quality teaching and business and community engagement but on asking the HE system in Wales to provide this: 'What we are saying to them is focus on your mission in order to become globally competitive. You will never achieve that by doing a bit of everything'.

4.21 This was clearly linked to the discussion of a new regional approach to HE flagged up in *'For Our Future'* and one stakeholder went further still, arguing that the Welsh Assembly Government, building on its emerging regional approach, should select three HEIs – one in each region – to lead on upskilling and employer engagement, working closely with FEIs, which should receive earmarked Mission funding to drive this agenda forward, recognising that there were development costs and diseconomies of scale associated with developing this strand of work much more energetically. Another felt:

'You don't need individual institutions doing or trying to do everything. So FEIs should be doing specific things, HEIs doing specific (other) things and all of them talking to each other. The problem is, can that ever happen where there still exists a sense of competition between the two based on the fact that 'the learner' brings in your income? Would a HE ever tell a learner that they would be better suited to FE? We are talking after all about business organisations, driven in part (maybe large part) by income maximising motives'.

4.22 While many interviewees believed that some HEIs had a deep commitment to part-time provision (certainly in terms of engaging with employers and the economic needs of their region), at least one (with considerable experience within the sector, in both England and Wales) was openly more sceptical, believing that this commitment was borne more out of necessity than principle.

4.23 This interviewee suggested that almost all senior managers within HEIs shared a clear perception of a 'pecking order', with the Russell Group at the apex (which it might be argued, mirrors the lack of parity of esteem between vocational and academic education at lower levels of the education system) and argued that newer HEIs had tended to focus on mature and part-time learners and on the CPD market because they were not able to compete effectively in the two more traditional HE markets of research funding and recruiting full-time learners. This interviewee doubted that any HEIs in Wales really saw part-time provision as a central long-term goal, though some with a very strong reliance on CPD would see it as essential to their business.

Drivers of Part-Time Provision

4.24 As will already be clear from the discussion in Section 4.2, those HEIs with the highest proportion of learners studying part-time generally argued that their Mission was the key driver of their engagement with this agenda, while some interviewees suggested that, in the past at least, when supply of full-time places was outstripping demand, providing part-time places had been a way of 'filling empty seats on full-time courses'.

4.25 At the same time, some interviewees also stressed that there were good business reasons for seeking to engage with some part-time provision, particularly those elements where employers were willing and able to make a financial contribution (such as with the professionally-related courses). One argued:

'This is within the context that [the HEI] is an economic entity, underpinned by business principles of income and costs. But like all universities we also have social objectives which underpin a lot of what we do. And this sits well with part-time provision and agendas like widening access.'

4.26 Indeed, in this case, the interviewee suggested that the HEI was quite aggressively seeking out market share, using the cost competitive advantages which flowed from the fact that many fixed costs were financed in part through core provision to undercut existing provision in the market place:

‘As much of it is work based learning/short courses then there is a strong commercial element and we try there to offer a competitive rate by making sure we undercut what is perhaps the going rate elsewhere. We also do some courses as loss leaders just to get into the market ...Management and leadership courses from commercial providers can be incredibly expensive and we are undercutting those by at least 50%. And we’re getting a good uptake on those courses as a result.’

4.27 While few other HEIs had quite such a competitive focus, many others emphasised the role of employer-facing provision and professional courses as core to their business model, while other interviewees also emphasised that there was significant provision in high level skills by private providers. Another more traditional university gave the example of having relatively recently developed a new part-time MBA having discovered that a similar course had turned into a ‘cash cow’ for another Welsh HEI. Franchise provision (whether full-time or part-time) was also seen for some HEIs as a way of bolstering the bottom line without incurring risk.

4.28 Market potential of course reflects or assumes demand, but there were mixed messages from interviewees in terms of how far HEIs were really responding to, as opposed to trying to shape, demand, in particular, from employers for high level skills. One HEI with a very strong emphasis on employer-facing part-time provision, while agreeing with a more common view that HEIs needed to stimulate demand by active employer engagement, nevertheless felt that ‘as soon as you open the door [to employers], you are overwhelmed by the demand’.

- 4.29 This view was echoed by a number of interviewees from other institutions who argued that a significant proportion of their provision was now shaped to respond to the explicit requirements of employers, with one, for example, citing the current development of a new part-time course for care and community health workers which had arisen from a specific issue around demarcation between care workers and clinical staff which had been highlighted to the HEI by two local authorities.
- 4.30 However, a greater number of interviewees both within HEIs and other stakeholders were much less convinced that HEIs were able to be driven by expressed employer demand. One in particular was doubtful that there was evidence to sustain the claims that employers wanted much more part-time HE provision and in particular was quite sceptical about the push for Foundation Degrees. In practice, according to this interviewee, the demand here seemed almost entirely to be from the public sector, notably health.
- 4.31 In terms of policy, most interviewees believed that part-time provision had moved steadily up the Welsh Assembly Government's policy agenda, with *'For Our Future'* marking a milestone in this regard, even if this was accompanied by some scepticism that the Welsh Assembly Government was clear about precisely what it wanted to achieve by this renewed emphasis and some doubt as to whether it was prepared to back its rhetorical commitment with more concrete evidence (particularly in terms of funding – see Section 4.4 below):
- ‘There’s a lot of rhetoric around it, but I’m not convinced that they really mean it...the real issue about part-time study is the funding of it ... and the funding for students to do part-time...until they sort that out, it’s always going to be a challenge’.
- 4.32 Some interviewees, particularly but not exclusively those from HEIs who were most committed to delivering part-time learning, felt HEFCW was probably less intellectually committed to the promotion of part-time learning. One noted:

‘It’s [Welsh Assembly Government] officials we’ve had conversations with about, for example, Foundation Degrees and the part-time element there ... that hasn’t been HEFCW at all ... so I would say the pressure comes from [Welsh Assembly Government], not HEFCW’.

4.33 However, most felt HEFCW was careful to echo the Welsh Assembly Government’s policy message:

‘I have to say that they are not particularly distinguishable in the sense that we feel HEFCW answers to [Welsh Assembly Government’s] demands and via the funding path we implement HEFCW’s wishes, as such. From a HEI perspective there’s no real difference ...I don’t think for example, Skills that Work for Wales was [a] particularly good document because it didn’t go far enough on small bites of learning and foundation degree. It skirted around the edges on that. And yet HEFCW have clearly supported such moves’.

4.34 However, the fact that policy intent was not reflected in planning and funding levers was regarded by many interviewees as reducing the impact of these policy signals in terms of HEIs provision. Thus, interviewees in one HEI argued that the emphasis on part-time provision had been fairly confined and could have been driven more forcefully had policy makers wanted to: for example, neither the Welsh Assembly Government nor HEFCW had explored the option of safeguarding part-time credits for HEIs to date. For these interviewees, whilst the policy focus on part-time provision was probably there within Welsh Assembly Government documents, HEFCW had not necessarily taken the appropriate implementation steps to ensure its delivery across HEIs was safeguarded or increased. Another interviewee echoed this view that policy messages were fine but they did not change behaviour:

‘We always discuss political documents ...the [For Our] Future document and so forth ...but universities are all pretty conservative ... we don’t tend to change fast ...with the exception of where there’s money on offer’.

- 4.35 While many interviewees noted that *'For Our Future'* clearly flagged up part-time provision as critical to the 'twin [priorities of] economic vitality ... and social justice', a minority questioned whether in reality either the Third Mission agenda or Widening Access automatically drove HEIs towards part-time provision.
- 4.36 While employer engagement was seen as critical to Third Mission strategies, some interviewees argued that employers and their representative bodies were more interested in the flow of new entrants from HEIs into their sectors, and were more concerned with the employability of new graduates and the relevance of their learning to the workplace, rather than wishing to engage with HEIs as providers of learning and training for their existing staff. Third Mission activities for many HEIs were also as strongly, or even more, focused on knowledge transfer as they were on the skills development agenda.
- 4.37 Indeed, interviewees from one HEI went so far as to argue that there was a contradiction between the Welsh Assembly Government's drive to promote STEM subjects – which was seen as a major driver of the Institution's forward strategy – and a focus on part-time learning since STEM subjects were not easily compatible with part-time provision.
- 4.38 Similarly, some interviewees questioned whether the rather glib equation of widening access with part-time provision was appropriate. In reality, it was noted that several Reaching Wider partnerships had prioritised work with school pupils in Widening Access areas, with the aim of recruiting non-traditional students to what were often very traditionally structured and delivered courses:
- 'I also want to say that Reaching Wider is very school orientated at the moment. That's good in many respects, clearly schools have a substantial role to play. But the idea is also broadening the net. So not just "school pupils from disadvantaged areas into HE", but "people from disadvantaged areas generally" into part-time HE'.

- 4.39 Conversely, many part-time students at HEIs (e.g. following professional qualifications, as well of course as postgraduate students) were often from socio-economic groups which were well represented in HE and were often themselves graduates, with one HEI Vice-Chancellor pointing out that on average his part-time students were from more secure backgrounds than his full-time ones.
- 4.40 Other interviewees noted that while more mature students taking a 'second chance' to gain access to HE might well have other financial and family responsibilities which meant they had no option but to follow a part-time route, in many ways this was not desirable, since it could be far more demanding of the student, particularly if (as was often the case with students from widening access communities where there was little experience of HE) they had little peer support.
- 4.41 Finally, some interviewees noted that, with the majority of 'full-time' students increasingly working in some way alongside their studies in order to minimise debt, there was an increased blurring of the distinction between them and part-time students:
- 'It's changed ...it's not like that any more ...the distinction between full-time and part-time is very, very blurred at the minutea significant number of [the HEI's] full-time students are actually part-time ...they may be studying full-time, but they're also working significant hours as well ...so that artificial barrier between the two is starting to disappear'.
- 4.42 Also, for several institutions, a high proportion of full-time students were 'mature' with other responsibilities including childcare. For these interviewees, the increasing diversity and heterogeneity of their full-time student population was as much a driver of changes in terms of the timing and type of delivery of both learning and ancillary services (libraries, student support services etc) as was part-time provision.

Barriers to Part-Time Provision

- 4.43 As we have already seen, a number of interviewees explicitly juxtaposed the policy commitment to driving up the availability of part-time provision in Welsh HEIs with a funding system which at best lacked incentives to encourage HEIs to go down this route.
- 4.44 More generally, in terms of the barriers impeding HEIs, it was the funding system which was raised by the overwhelming majority of interviewees as the main factor which discouraged or even impeded HEIs from offering a higher proportion of courses and places on a part-time basis.
- 4.45 At the most fundamental level, a number of interviewees pointed out that HEFCW's formula-based funding system which worked largely on rolling forward historic volumes of funded learning. This is seen as favouring the status quo and, since almost all HEIs are at or exceeding their cap, gives no scope for HEIs to make the case for additional funds to respond to identified needs. Thus, one interviewee argued that those HEIs who proactively worked with employers and other partners (e.g. FEIs) to identify new requirements for part-time HE ran up against a brick wall in terms of funding this provision, unless they could persuade employers to meet the full costs. This was because of the cap on credit volumes at historic levels and the fact that there was no ring-fencing of part-time provision.
- 4.46 Within this overall context, there were two inter-related aspects to the problems of funding. The first was related to funding for HEIs themselves, and the second to do with student finance.
- 4.47 In respect of HEIs themselves, interviewees argued that, particularly since the introduction of 'variable fees', HEIs had struggled to raise fee levels for part-time students in a way commensurate with the levels paid by full-timers (discussed further in Section 4.5 below). Thus, although

HEFCW funding was calibrated in exact proportion to the credit value of courses, there was generally a significant shortfall on the income side of the equation for the delivery of part-time courses.

4.48 While the Additional Funding introduced as a result of the Graham Review was a recognition of this fact, this mechanism is indirect: although the global amount allocated to each HEI reflects overall part-time numbers, this is on a historic basis, and the funding is dependent on being seen to be used for specific purposes (such as bursaries or funding longer opening hours for student services) which are germane to part-time provision. This is in contrast to, say, the Widening Access premium where there is a direct financial incentive attached to the recruitment of each additional student from the relevant geographical areas. Indeed, the idea of a part-time premium was mooted in the deliberations at the time of the Graham Report but was thought too expensive, and was raised again in our report on the Graham Funding¹⁴³.

4.49 According to some interviewees, not only was the fee income from part-time provision generally lower, there was also an issue of the *'bankability'* of funding for future years. Whereas once a full-time student enrolled, the chances were high that he or she would continue for a second and third year, prospects were much less certain in respect of part-time students.

4.50 Moreover, at least one interviewee pointed out that there was no certainty that the Graham funding, which at least in some part did provide a compensation mechanism, would continue for what might be five or six years of a part-time student's life at university:

'If [Welsh Assembly Government] and HEFCW are serious about this [part-time provision] then they need to move away from annual Graham funding to mainstreamed premium funding for part-time provision.'

¹⁴³ Evaluation of the Additional Funding for Part-Time Students, p. 40

4.51 If income from part-time students was regarded as both lower and less reliable than that from full-time students, then it was also true that costs tended to be higher. Interviewees noted that many of the costs associated with each student (not least those associated with registration costs and collecting data) were *per capita* regardless of the intensity of the provision. Thus, two students each undertaking a 60 credit course carried a greater administrative cost than one student doing a 120 credit course (though to be fair, it might be pointed out that one, albeit small, element of the current formula is a per capita payment for each enrolled student, regardless of the number of credits followed).

4.52 Overall, the strong view from interviewees within those HEIs with a relatively low proportion of part-time students was that it would make no sense to try to prioritise part-time recruitment given these financial dynamics with one commenting that as a result of the increase in applications for full-time places:

‘We made a conscious decision to deliver more full-time provision ...we don’t need to be delivering part-time courses as we are over-subscribed at the University’.

4.53 Similarly, those HEIs who saw part-time provision as integral to their Mission explained that they were under constant pressure from Financial Directors (particularly in the light of the sharp upswing in applications for full-time places) to reduce part-time provision (at least that major element which was eligible for HEFCW funding) in favour of a greater concentration on full-time places. One noted that if cost-cutting was required ‘part-time provision will be the first to go’, while another said that, given an upswing in applications through UCAS ‘we are being driven down what is a financially more efficient route’.

4.54 In a third case, a longstanding policy to re-balance the proportion of enrolments towards a greater number of full-time students had been driven ‘by the financial analysis by people in finance and strategic

planning that its very difficult to sustain yourself if you don't increase the proportion of full-time students.'

4.55 Another interviewee noted:

'I can imagine that some hard-nosed Directors of Finance in Welsh universities [are] questioning, quite rightly, the benefits of offering part-time provision. Looking at it in a purely financial way you would not support part-time provision and certainly not look to grow it.'

4.56 This was possible because while the allocation of credit volumes to individual HEIs was calculated on the basis of separate elements of full-time and part-time provision, this was done on the basis of historic data and there was, at present, nothing to prevent HEIs from switching full-time credits to part-time and vice-versa.

4.57 In terms of student finance, many interviewees also pointed to the fact that the playing field was anything but level in respect of full-time and part-time students. Whereas full-time students were eligible for a wide range of support towards both fees (in the shape of the fee loan) and living costs, these instruments were not available to part-time students, with the exception of limited funding for living costs for those (a minority of part-time students) studying for more than 60 credits:

'Below 50% of full-time study there is often nothing in terms of support. That means commercial loans and high interest rates and serious consideration about affordability ...77% of part-time students don't get any course fee grants due to the criteria.'

4.58 While some contributors recognised that trying to have a uniform system was fraught with difficulties (What income do you take into account in calculating entitlements? When would a student who was already working during his studies start repaying any fee loan?) and while it was generally acknowledged that there would be huge issues of affordability, many interviewees thought that this fundamentally undermined the demand for part-time learning (at least, from individuals not funded by

their employers), as well as putting downward pressure on fee levels for part-time provision.

- 4.59 As well as being highlighted by HEIs, the primacy of funding considerations as a barrier was recognised by other stakeholders with one saying:
- ‘We can’t promote part-time Higher Education within the existing model of Higher Education funding ...that’s why it’s been avoided, it’s the elephant in the room’.
- 4.60 Another, with a more critical view on the willingness as well as the capacity of HEIs to address the challenge of part-time provision said:
- ‘You have to start from the fact that many HEIs in Wales are still a bit aloof when it comes to part-time provision. You sense that they feel: “we will get students anyway, so why do we need to go out and attract more students via part-time programmes with the work that that will take?”’.
- 4.61 Though the structure of funding both institutions and individuals was seen as the critical barrier to providing greater part-time opportunities, there were other organisational and cultural barriers, which, while inter-dependent with financial questions, were not synonymous with them.
- 4.62 Thus, a number of interviewees pointed out that not only was the Student finance system inherently unequal in terms of the rigid separation between support for full-time students (and especially undergraduates) and everyone else, but the information available was far more fragmented. One interviewee pointed out that the Student Finance Wales website, for example, was hard to navigate for those who were hoping to study on a part-time basis. Another suggested that research undertaken by the National Association of Student Money Advisers (NASMA) highlighted the fact that whereas potential full-time students could get an early indication of what they were likely to receive, certainly well in advance of beginning their course, for most part-time

students, the process of applying for support rarely was available more than a month or two before the start of the academic year:

‘The main problem is that people are coming to open days in April this year¹⁴⁴ who won’t actually start until 2011. But they want the facts and figures now. And they want those figures to be pretty accurate. We cannot guarantee them that accuracy, and the figures we do give them are inevitably out of date by the time they get around to completing the forms. So the system does not seem to recognise that part-time students are actually going through a fairly thorough planning process for their study. They ask themselves questions of affordability and a big part of that is any funding support they may be able to claim. And they are asking these questions long before their potential start date’.

4.63 More problematic still, whereas full-time students could apply through the UCAS system, many interviewees pointed out that admissions for part-time students were dealt with by individual HEIs. There was thus no easy, high profile way in which those considering studying but unable to do so on a full-time basis could access information across the range of HEIs and, still more importantly, could apply for a range of courses through one application system. As one stakeholder pointed out:

‘All of this starts before university - at the point of entry full-time students go through UCAS who provide a lot of information and guidance. Part-time students tend to go straight to the HEI. [We] would like see them have the opportunity to engage with UCAS to access the information full-time students get. We think it would help with drop-out rates particularly in that first year’.

4.64 While this was a major disincentive to potential students, it was also a problem for HEIs, with interviewees suggesting that it was far more costly and risky to try to generate applications for part-time provision than for full-time courses. Thus, one HEI argued that, while generating take-up of an employer facing course often required intensive work with

¹⁴⁴ 2010

employers, for 'traditional' full-time courses 'you just need to write things for your prospectus'.

4.65 This was echoed by another interviewee who pointed out that the effort to identify new learners as part of the University of the Head of the Valleys Initiative (UHOVI) involved a really intensive effort in terms of employer engagement – getting people knocking on doors 'and quite often getting them slammed in their faces'. This simply underlined a general point that the costs of recruitment for part-time learners were far higher because it required much more intensive methods – you could not rely on advertising, but had to work direct with employers and communities:

'In proportionate terms, the effort you have to make for the part-time students is proportionately more expensive'.

4.66 Within HEIs, there were also organisational issues, including resistance by staff to working non-traditional hours, which made it more difficult to respond to demands from employers and individuals with other work and lifestyle commitments to provision which was more flexible. In some cases, there was a high degree of rigidity, with one HEI admitting that 'we are quite a traditional University and so tutors are reluctant to deliver outside the usual hours'.

4.67 Another commented:

'Most universities are set up to suit the staff ...most of us want to teach Monday to Friday ...most universities have a lot of staff who don't like teaching in the evenings or the weekends ...but that doesn't necessarily match with the demand that there is from outside'.

4.68 While this was not the case with all HEIs, even those who appeared most strongly committed to prioritising this agenda were challenged, for example, by requirements from employers to deliver learning in intensive block sessions during term time, though one interviewee noted that such problems had been overcome, but only by recruiting new staff

specifically to deliver a course which required block delivery at weekends, arguably risking the development of two separate cadres of teachers within the same Institution.

4.69 Similar problems applied to issues such as library opening hours and the availability of student services. One stakeholder commented, for example, that she had been appalled on a recent visit to a large HEI to find that the Student Services office was only open between 9 a.m. and 5 p.m. on weekdays. In another HEI, where the library was open from 8.30 a.m., to 9 p.m., there was nevertheless pressure from students to open for longer hours.

4.70 More generally, some interviewees felt that the whole approach of their own Institutions was still predicated on putting systems in place for full-time students and then 'retro-fitting' them for part-timers. One interviewee admitted that 'like most universities [the HEI was] set up to deliver full-time education and not part-time education'.

4.71 An interviewee from another HEI where a high proportion of enrolments were part-time nevertheless commented:

'You see that manifested itself in all sorts of places. And sometimes it's quite subtle. You set up your systems for full-time students and then you think "now, how do I adjust for part-time students".'

4.72 This same interviewee went on to point out that:

'Technically the majority [of full-time courses] are open to part-time students ...but that often isn't the issue, the issue is about how you timetable them and promote them'.

4.73 More subtly, interviewees argued that the recruitment to part-time provision was undermined by a widespread perception in society in general (and thus reflected in attitudes by employers as well as individuals) that universities were still about providing a three year education for 18 year olds:

‘But there is clearly tension from the fact that HE in Wales is still predominately seen as a young person’s thing – from 18 to 21 years’.

4.74 This in turn was a barrier to demand arising, with one interviewee arguing that there was a vicious circle here with HEIs also to blame: ‘Cultural issues are a problem. The bed rock of what we do is learning and teaching 18-25 years and that accounts for 80-90% of our income. Next comes research grants and they are important. Next is what they call Third Mission activities - which is not a popular name – which contributes the least funding of the three. Even the name suggests it is third rate – in the Ivy League Unis in America or the red bricks here, it is the research professor who is traditionally the most esteemed. Where does the academic entrepreneur come within this? We think that that should change, that academics involved in what is called Third Mission activities should have the same parity of esteem as the research professor. But it will require a cultural change, enormous cultural change within the universities’.

4.75 Some interviewees argued that the general view that HEIs were not ‘for’ part-time learners and a reluctance of other learning providers (particularly those involved with Adult and Community Learning) to signpost learners who had achieved well at lower levels of learning to HEIs was a barrier. This appeared to also be a reason why some HEIs themselves laid on often quite extensive provision at lower levels of learning, in order to nurture learners who would eventually progress to HE study.

Views on Relative Costs of, and Income from, Part-Time Provision

4.76 We have already discussed in Section 4.4 above the strongly held perception that there are strong financial disincentives for HEIs in laying on part-time provision where there is sufficient demand for full-time provision.

4.77 As already noted, in the vast majority of cases, HEIs believed that it was not possible to charge tuition fees at the same rate *pro rata* for part-time as for full-time students. This appeared to be less true of postgraduate places, and in some cases, was also less true for professional qualifications. But generally, even where courses were eligible for HEFCW funding (and thus employers were expected only to meet a relatively modest proportion of the real cost of the provision) HEI interviewees believed that it was impossible to charge fees which were commensurate with the income to be derived from full-time students. This was said to be true even of public sector employers where, for example, in the case of NHS employers, 'if you push it too high, the NHS won't pay for it ... the market will collapse'.

4.78 An interviewee from another HEI similarly noted that 'employers are cutting their costs and really tightening up, even within the public sector'.

4.79 In the case of the private sector, even the very largest employers were believed to be reluctant to pay full market rates for provision (with the partial exception of leadership and management and Business School type provision) while it was argued that SMEs, particularly in areas like the Heads of the Valleys, were very difficult to engage at all, unless learning was virtually free. This was partly because such employers were sceptical of the value of training *per se* or simply unaware of their real needs:

'If you look across the economic infrastructure – small companies are scraping around to see where the next contract is coming for ...it's not a question of demand because employers don't know they need it, it's a question of need ...it's a question of unmet need, not unmet demand'.

4.80 Several interviewees suggested that the fact that lower level training, such as Apprenticeships was effectively provided free to employers meant that there were similar expectations of HEIs.

4.81 The apparent relatively low contribution by employers to the costs of learning is perhaps particularly concerning in the light of two developments elsewhere in the learning agenda:

- Firstly the development of a Fees Policy (predominantly directed at FE) which argues that at higher levels of learning, where market returns to the individual and employer are generally higher, the costs of learning must be more equitably shared between the state, the employer and the individual, with an explicit aim that ‘it is essential to change the expectations of individuals and employers about fees as soon as possible’¹⁴⁵
- Secondly, the explicit intention of HEFCE in England to make sure that employers’ contributions to the costs of HE provision for work related learning increase, with HEFCE’s credit based funding being reduced.

4.82 In the case of provision not directly arranged with the employer, but which was nevertheless vocational, many HEIs did not appear to explicitly keep track of cases where employers were reimbursing students for their fees. Where individuals were themselves paying fees, interviewees generally believed that it was wholly unrealistic to expect more than a small proportion of the population to be able to pay fees which were anywhere near the *pro rata* level of full-time fees.

4.83 There is no guidance from HEFCW as to policy in terms of fees for part-time study, and the evidence from the implementation of the Fee Waiver policy (which pays HEIs directly for the fees for part-time learners on certain statutory benefits) was said by interviewees to show a huge range of different fee levels. While the evidence from our fieldwork was not comprehensive, it would appear that, with the exception of postgraduate courses and some professional qualifications, course fees for undergraduate provision were rarely more than £10 or £12 per credit (the equivalent of no more than £1,500 for a 120 credit full-time course, for which the fee income to the institution would be around £3,200).

¹⁴⁵ Investing in Skills: Consultation Document (DCELLS), p. 16

- 4.84 Moreover, in many cases, HEIs operated their own fee waiver schemes, sometimes funded through the Graham Funding, but sometimes funded from core resources, for unwaged students not on the benefits qualifying for the HEFCW scheme. One small HEI claimed that this was costing the Institution more than £100,000 this year, compared to only £14,000 being reclaimed from HEFCW under the Fee Waiver Scheme.
- 4.85 HEI interviewees generally acknowledged, however, that there was a lack of clear policies or guidance (even at the level of the institution) about fees policy and few of our interviewees were able to give a quick and unequivocal answer about the fees charged for part-time provision. Thus one, while pointing out that the Institution had recently set up a working group to try to put part-time fees on a more coherent basis, acknowledged that ‘up to now its been on an entirely ad hoc basis, with each school setting its own fees and agreeing these with finance’.
- 4.86 Another said:
- ‘We’re not too good at judging, as an institution ...or as a sector ...we’re not like businesses in judging price sensitivity ...an awful lot of what institutions do is to lick your finger and stick it in the air’.
- 4.87 In terms of costs, as we have already seen, most interviewees believed that the costs of part-time provision were generally higher, though one qualified this by saying ‘unless it’s done by filling up full-time courses ... then it’s a marginal cost’.
- 4.88 The reasons for this were the ‘transactional costs’ of enrolling and providing core services to each individual student, recruitment costs due to of the lack of a clear and well known portal (such as UCAS) and the fact that much employer facing provision was reliant on direct contacts with employers and, finally, additional costs for provision and support outside standard hours:

‘You’ve got issues that range from simple economies of scale - part-time taught courses generally have less students per class but of course you still have the same costs of provision i.e. a lecturer in a room there. If you are talking about evening or weekend work – and you certainly are when you talk about short work base learning courses – then it’s about having the staff available at that time and the additional costs of having them to work those hours’.

4.89 However, very few interviewees were able to provide any clear data on the scale of these additional costs, though one interviewee from a HEI which invested heavily in part-time provision believed that costs were about ‘a third more’ (given additional costs of out of hours offer, similar overhead costs as full-time student in terms of student support and administration costs).

4.90 Importantly, however, several interviewees stressed that support costs were not necessarily higher for part-time students, and that this very much depended on the sort of part-time provision which was involved. Thus, employed students on professional qualification courses such as accountancy or CPD for teachers were unlikely to call on student support services, whereas those on community outreach or access provision might have extensive support needs.

Views on Unmet Demand

4.91 Questions about the ways in which new provision was developed and the extent to which there might be unmet demand from employers and individuals generally drew quite varied responses.

4.92 Interviewees suggested that most HEIs had quite a dynamic approach to developing new provision (whether full or part-time) with significant ‘churn’ over time, and also had quite rigorous systems in place for approving new courses, which at least theoretically looked at the issue of potential learner demand. At the same time, several interviewees

suggested that establishing demand for courses was at best an art, rather than a science and that, in practice, demand often had to be created by the offer of provision.

4.93 Thus one HEI interviewee admitted that:

‘We are rather like most HE in that ...we’ve never developed a robust business model for the approval of courses...I can tell you about demand for current provision over time ...but I couldn’t tell you where I’d look at demand statistics’.

4.94 This interviewee added that, in their view, what the University typically considers ‘demand data’ was actually ‘historical data on supply’ and went on to say:

‘The way that most courses are [initiated is through] the entrepreneurial activity of academics at the local level ...who have a good idea ...it’s often the case that we don’t look at demand ...an academic will put a figure on it of 25 students ...but there’s no data to support that ...it’s a hunch more than anything else’.

4.95 While this was at the more extreme end of the spectrum, an interviewee from another HEI argued that it was difficult to say whether demand originated from the ‘market’ or whether it was a product of what the University and its franchised providers actually offered. This interviewee was candid that the HEI did not have any real sense of ‘what there might be latent demand for’ and that requests for new or ‘off-menu’ courses tended to come in ‘in a slightly piecemeal way’.

4.96 An interviewee from a third HEI agreed that the University had on occasion ‘run courses on a hunch’.

4.97 Several HEIs, particularly those for whom employer-supported provision was important, clearly relied more heavily on direct discussions with employers (including in one case an impressive list of major employers within the relevant region) and sometimes commissioned research to

identify and develop provision. However, even here, interviewees were keen to stress that provision was not just about responding to employers' expressed needs but was also about identifying opportunities and 'selling' them to employers, arguing that a key advantage of HE ought to be its capacity to use awareness of technological, regulatory and environmental change to identify future needs:

'[It's important to be] not simply waiting for the employer to come back and say this is what we need in the next three years, but to be working with them using our own expertise as universities to say do you realise this is what coming down the track, new legislation, new technologies, this has implications for the whole way you work, do you want to work with us to try to address that'.

'It's not just about demand, we are also trying to drive forward the economic development agenda'.

4.98 Most interviewees struggled with the notion of latent demand, particularly on the part of individuals, with some arguing that it would be impossible to gauge this except by whole population surveys and even this would be unlikely to help because many people would have no idea of what might be made available and how it would relate to their needs. In the absence of this, and given the continued preconceptions about university being for school leavers, individuals were never likely to consider and ask for opportunities which were not made available to them. In reality, most interviewees believed that it was only by offering provision in the market place that you could test out demand, though one added:

'You can't escape the feeling that there might be things you are overlooking ...may be they want weekend delivery or whatever, but that won't manifest itself ...unless you go looking for it'.

4.99 Some even questioned the notion of latent demand with one stakeholder from outside the HE sector arguing that 'responding to and generating demand are two sides of the same coin'.

4.100 Having said this, individual interviewees did suggest a range of areas where they believed (albeit without specific evidence) that there might be unfulfilled demand:

- STEM subjects (on the basis that most part-time provision targeted at individuals remained within the arts and humanities), raised by at least half a dozen interviewees. However, one pointed out that there was insufficient demand in for full-time places in some of these subjects;
- Foundation Degrees in general where one stakeholder felt Welsh HEIs had been slow off the mark;
- ‘anything to do with the word creative ... creative writing ... theatre ... drama’, ‘local history’ and ‘genealogy’;
- ‘business and technology’;
- ‘generic leadership and management skills, organisational change and organisation resilience’;
- IT and IT capacity building;
- sustainable technologies.

4.101 More concretely, one HEI provided a very specific list of potential provision in a wide range of vocational subjects where it had identified demand from employers. In total, these accounted for an additional 939 enrolments representing 45,320 additional credits within the University and 355 enrolments representing 36,180 credits in collaborative partners (compared to just under 170,000 funded credit units for the HEI in the current year).

Modes and Flexibility of Provision

4.102 In terms of modes of provision, it was quite striking that relatively few Welsh HEIs had significant capacity in terms of e-learning or other distance learning. The obvious exception is the OUiW which has access to a unique business model and large-scale investment in learning

material development as it is part of one of the largest providers of distance learning globally, not just in the UK,

4.103 Although, particularly for postgraduate part-time study, a significant proportion of students might spend relatively little time on campus, HEIs were generally wedded to a model of 'blended learning', where materials might be available on line to support the curriculum, but where the bedrock of tuition was still delivered on a face-to-face basis. However, one interviewee argued that given the ubiquity of the internet and the growing importance of intranet (Blackboard) or web-based (Moodle) applications in HEIs, 'the boundary [between distance learning and campus based learning] has become blurred'.

4.104 Of course, there were exceptions to this, with interviewees citing specific courses which were primarily delivered on a distance learning basis (in some cases, being market leaders within the UK and more widely) or where all lectures were routinely videoed and made available digitally.

4.105 Concerns about the issues of quality assurance and the cost of developing (and supporting) freestanding e-learning based courses lay behind Welsh HEIs' reluctance to go down this road to any significant degree. One HEI interviewee with some experience of developing such courses stressed that senior managers' subscription to the idea of e-learning or distance learning was driven by a perception that it would enable the Institution to reach wider markets with products that were 'fit for purpose', rather than an expectation of cost savings. Indeed, it was argued that:

'the demands for support from students [undertaking their learning at a distance] are bottomless ...fathomless ...staff running distance learning materials get e-mailed every hour of the day and night'.

4.106 This HEI was therefore concentrating the development of on-line courses on postgraduate provision, where it was expected that students

would be more self-reliant and less dependent on remote support: distance learning was regarded as inappropriate for undergraduate level study:

‘Distance learning at an undergraduate level is a whole different ball game ...particularly challenging’.

4.107 An interviewee from another HEI argued that in their Institution the view had been taken that distance learning was not the most effective means of study for most students and that the OUiW in any case already had a predominant position in this market.

4.108 In terms of the delivery of learning opportunities off-campus, a minority of HEIs (generally ones where part-time provision represented quite a low proportion of overall provision) had significant provision in community locations, with one talking of ‘a couple of dozen’ community locations. However, generally such provision was specific to the ‘community education offer’ (though individual modules or units were often drawn from ‘mainstream’ provision and, in one case at least, drew on academic staff from within the other faculties rather than the dedicated lifelong learning team).

4.109 A small number of other HEIs also appeared to deliver a significant proportion of their employer-facing training at employers’ locations or neutral venues rather than on-campus.

4.110 Of course, for a small number of HEIs, delivery of HE courses through FE franchise partners was a key part of their part-time provision, with, in one case, the bulk of undergraduate degree and non-degree part-time provision being delivered in this way. Interestingly, in general terms, those HEIs which had traditionally delivered significant volumes of learning in this way were now retrenching to a greater or lesser degree, arguing that with financial restraint on the horizon, they would have instead to focus on ‘wholly owned’ provision.

4.111 On the other hand, a number of HEIs who had not traditionally sought to build alliances with FEIs were now more actively considering this, albeit mostly in order to bolster progression into HE level courses, rather than as franchise partners. Thus, one HEI said that active partnerships with FEIs were now in prospect in order to build progression routes into the HEI for STEM subjects, an Institutional priority, while another argued:

‘[The University] needs to consider the skills market, but working with FE increasingly to ensure there’s no competition, no overlap, clear boundaries’.

4.112 Finally, in terms of timings, HEI interviewees gave a range of responses which broadly reflected the proportion of their existing provision which was specifically targeted on part-time learners (particularly those with employed status who were following work-related courses). Broadly, however, most HEIs with this sort of strong employer-facing profile made professional development courses available through ‘day release’, ‘twilight’ and less often, weekend delivery. Community-based courses were sometimes run in evenings or weekends, though this was by no means generally the case – reflecting (or perhaps to some extent accounting for) the fact that a high proportion of participants in these sort of courses were not working.

4.113 However, while for most HEIs, much provision was available either on a full-time or part-time basis, with only one or two exceptions, HEIs did not generally appear to structure ‘dual use’ undergraduate courses (i.e. ones which could be accessed on a full-time or part-time basis) on the basis of non-standard hours or block timetabling to make it easier for part-time students to fit learning around other commitments. One HEI interviewee argued that this was because almost all part-time students not following CPD related courses were not working and so could attend during the day.

4.114 In this context, one stakeholder with considerable experience of HE in England noted that, unlike across the border, there were no Welsh HEIs (with the exception of the OUiW) where the default position was to make provision available on the basis that it could be fitted around work commitments.

Student Retention and Student Support

4.115 In general, HEI interviewees were unable to provide robust data on part-time student retention, though this is not to say that such data is not collected. Definitional issues are a key problem here. For example, how could one be clear about the goals of a student enrolling on, say a 30 credit module which formed part of a qualification but which was designed to be delivered as a stand-alone unit? In these circumstances, the perception that a student had 'dropped out' of a course because he or she did not continue to a further module was posited on an unproven assumption about their goals and motivations. One stakeholder argued that, given this, it was important to collect data about individual students' goals and aspirations at enrolment, but that this was rarely done.

4.116 Similarly, if a student having completed one module did not enrol in the next term on a further module, this did not necessarily mean they had terminated their engagement with HE, it might well mean that they had simply decided to take a break from study and would return. Conversely, however, a number of interviewees believed that in the case of some HEIs, figures for the number of enrolled part-time students exaggerated the numbers of 'live' students, since those who had 'paused' their studies (but who, in all probability, had no intention of continuing further) were nevertheless retained on the records.

4.117 For this reason, most HEI interviewees said that their institutions tended to look at module completion rates. In one case, however, where a HEI generally offered professionally related learning, the Institution had recently undertaken a study of module completion rates and non-

progression rates of part-time students and had discovered that while the former were generally high (with those dropping out tending to do so within the first two months of the course), the latter was a more serious issue. In this Institution, of 2,000 part-time students, in 2008/09 only 59 withdrew from their courses during the year, but 98 students failed to enrol for the second year of a course having completed year 1, with a further 128 failing to continue to the third year of a course where they had successfully completed the first two years.

- 4.118 While it was argued that some of these learners might well have decided that they had achieved an appropriate qualification, without progressing to the highest level offered, this HEI had concluded from the research that 'we have learnt that we need to do more work to ensure that individuals come back after the end of term – particularly to identify those who are likely to be non-returners'.
- 4.119 In terms of those dropping out of modules, the main reasons cited were study-related issues (described by the interviewee as all forms of 'I couldn't hack it') and changes in family circumstances (including health related developments). Financial issues were generally not cited, though this might reflect the fact that most part-time students were following work related courses, and few had to pay significant levels of fees individually.
- 4.120 The pattern of progression rates being a more significant issue than completion rates held true also for another major provider of part-time learning where completion rates were generally around 65% for undergraduate modules and 77% for postgraduate ones, but where continuation rates were generally between 40% and 50%.
- 4.121 As already noted, few other HEI interviewees were able to give very specific feedback. In general terms, levels of drop-out were thought to vary quite considerably, relating back to the question of the highly varied nature of part-time provision. Thus, completion rates for professionally-

related qualifications were generally high, while attrition was much greater in the case of community education or part-time enrolments in mainstream provision. For one HEI with a high proportion of part-time enrolments, drop out rates 'can be a bit higher' with this being in part attributed to the more complex lives part-time students often led:

'The thing is, with part-time students there is far more going on in their lives than for full-time students ...it's not what we do or don't do here its to do with other aspects of their lives?'

4.122 In the case of another HEI, an interviewee suggested that retention rates on part-time courses were generally between 70 – 80% compared to 90% on full-time courses and attributed this to issues such as 'logistics' and the 'personal cost' to part-time students.

4.123 However, interviewees from a number of HEIs noted that there was a very clear correlation between Widening Access students or students with relatively poor academic records (regardless of whether they were studying on a full-time or part-time basis) and higher rates of non-completion and that this was much more significant than any linkage which could be made to mode of study. Other stakeholders also noted that many Welsh HEIs performed poorly in relation to student retention for full-time students (with four Welsh Institutions amongst the worst performing 20 UK HEIs) but recognised that this was linked to the level of recruitment from Widening Access areas. On this same theme, several HEI interviewees argued that placing such a strong focus on retention rates, without analysing in the context of the socio-economic profile of the student body, was iniquitous and (particularly as demand for HE began to outstrip supply) risked incentivising Institutions to put Widening Access on the back burner.

4.124 In terms of student support, we have already noted that many interviewees felt that needs varied for part-time students dependent on the type of part-time provision. Few of those (often graduates) undertaking professional qualifications require comparable support to

most full-time students while, for example, those following community education programmes, often from communities where HE learning was very rare, commonly had quite intensive support needs.

4.125 Most HEI interviewees said that student support services were available on an equitable basis to all students (including, in some cases, those on franchised courses):

‘In terms of the standard of support we provide, there’s no real difference’.

‘The basic principle is that part-time students aren’t treated any more or less favourably than full-time students’.

4.126 This was not true of all HEIs, however. In one, an interviewee commented that access to IT was not equitable for part-time students and that more generally:

‘I’d be fairly confident in saying that we offer very little in terms of learning support [for part-time students] ...other than those resources available electronically ...the Academic Office struggles with part-time students ...they don’t get the same learning experience’.

4.127 In another, student support was, at least formally restricted to those part-time students who were studying 60 credits or more:

‘Anybody who is part-time point five and above, can have the same amount and same quality ...careers advice, access [to] tutors ...it doesn’t mean to say they’re ruled out if they are point two ...we would still consider it ...on a case by case basis’.

4.128 While, in some cases, HEIs clearly had made extensive efforts to tailor services to part-time students’ needs, in general terms it was clear that indirect barriers, perhaps particularly in terms of the opening hours of key services, remained. For example, in one HEI with a high proportion of part-time students, opening hours of student services and the library had been extended thanks to ‘Graham’ funding, but the counselling

service was still only available during working hours on weekdays. In other HEIs there were issues about limited opening hours for student support and libraries, as already noted, and access to course leaders and lecturers:

‘The *modus operandi* of academics means that their office is only open for a few hours a week’.

4.129 Overall, speaking from a student perspective two different stakeholders summed up the practical barriers faced by part-time students:

‘It is still the case that too many part-time students find accessing support at university very difficult: things like child care, access to advice, library opening times ...Lack of funding and lack of support are the two things that stand out as barriers. Much of it is expectations or a lack of consideration or understanding of the part-time student’s context: in my experience part-time students would be given homework on Monday and asked to submit it on Wednesday. Now that might be fine for a full-time student but very difficult if you are a single mother with a full-time job. Traditional lifelong academics are not necessarily in tune with the realities of the life of that single mother. It’s up to the universities to train their staff in these issues and that doesn’t happen enough’.

‘HEIs are aware of the problem but are not able, or maybe not willing, to provide the resources to address the support issues. Maybe there needs to be a sort of critical mass within institutions before such things happen’.

4.130 As we have already noted, besides the HEFCW Fee Waiver, many HEIs offered part-time students who were unwaged or on low incomes fee waivers or remission, but within the context of a generally inconsistent approach to setting fee levels. These HEI-specific waiver or remission arrangements were often applied to far more students than the HEFCW Fee Waiver. Many HEIs also pointed out that part-time

students also had access to Financial Contingency Funds on a case-by-case basis.

4.131 It is also worth noting that in a number of HEIs, a significant proportion of part-time students were said to be on the staff of the HEI itself, with exemption from fees often being a standard part of the contract of employment. Indeed, in South-West Wales, the three HEIs operate an arrangement whereby the staff of each HEI have access to provision in all three HEIs on a fee-waived basis.

The Impact of the Recession: Past and Future

4.132 Interviewees pointed to a number of recession effects impacting on the provision within HEIs. The most obvious was an increased difficulty in persuading employers, particularly SMEs to invest in learning (already considered in Section 4.5 above). One interviewee who was heavily involved in providing accredited and non-accredited learning to employers noted:

‘We clearly lost some potential clients, perhaps others have cut back and there’s no doubt it’s been a tough time (maybe the wrong time) to be taking the approach we’ve been taking. But we also get a sense that many employers are taking a longer term perspective and looking at the longer term benefits and this has been helpful. I would say that at the moment enquiries are beginning to pick up and that suggests we’ve passed the worst of it’.

4.133 However, possibly of greater significance was thought to be the sharp upswing in young people applying for full-time places which (for the financial reasons discussed above) was tending to put downward pressure on the propensity of HEIs to develop and offer part-time provision. One HEI with a strong record on delivering work-based learning noted that there were very tough battles within the Senior Management Team in the HEI about whether to respond to the

increasing levels and quality of UCAS applications by scaling back on the proportion of the credit volume allocated to part-time learning.

4.134 Moreover, several interviewees suggested that, with unemployment rising in the population more generally, there will be a tendency for more mature students who had not experienced HE to apply for full-time places, rather than considering part-time options, while (in some cases) falling real incomes and job uncertainty reduces the propensity of those with jobs to consider taking additional financial burdens such as fees for HE part-time courses. In other words, that there was a change on the demand side of the equation as well as the supply side. From this perspective, it was argued by some that the fall in part-time provision which had been observed in the last couple of years was a perfectly natural response to the economic cycle.

4.135 Against this, some interviewees believed that there may have been a tendency for some students on benefits to 'play the system' by studying more or less full-time (for example, 110 credits), but continuing to claim benefits and also the fee waiver. It was thought that, at the margins at least, this might have had a part in the apparent increase in average credit volumes per part-time student.

HEIs' Future Plans

4.136 There were mixed views in terms of the likely pattern of future part-time provision. A minority of interviewees argued that part-time provision would inevitably resume its growth, pointing to the demographic trends which would reduce demand for traditional full-time places, the scope for far more engagement with employers and the need for HEIs to increase the proportion of income generated from bespoke provision which was independent of public funding:

'Traditional part-time provision (the courses that are identical to the equivalent full-time programmes just over longer periods) have shown declining numbers over the years. To the extent now that it is not now a

strategic priority for us ...but against that the trend is definitely towards greater priority for part-time study, it's just that it's now more about work based learning, short courses rather than what you might call traditional courses ...We also have to recognise that the culture in Wales is changing, that ongoing professional development is becoming recognised as something they [businesses] just have to do and that they need to pay for it themselves'.

4.137 Foundation Degrees were seen as a major opportunity by some interviewees, while several argued that the market for part-time postgraduate learning would increase, as it became increasingly apparent that a Masters or equivalent qualification was really necessary to establish the basis for a professional career, with individuals prepared to pay quite significant levels of up-front fees in order to secure career progression.

4.138 However, a more common view was that - in the absence of any fundamental policy shifts from the Welsh Assembly Government – part-time provision was likely to continue to come under severe pressure, at least in the short to medium term, as HEIs responded to the upswing in applications for full-time places (and the simultaneous freezing or reduction in credit volumes as a result of public expenditure cuts) by prioritising what was essentially the more financially attractive option of shifting the balance of provision towards full-timers.

4.139 In particular, those HEIs with extensive franchise arrangements were clearly planning to pull back. In one such case, an interviewee argued that the HEI had taken a gamble by expanding part-time provision over its credit volume through franchise agreements, hoping that 'the growth would be followed by financial underpinning from HEFCW', but now it was clear this would not happen, cuts were inevitable. Another noted that that restrictions on HE funding were leading to the withdrawal of franchise agreements across the board and that this was likely to lead to

a reduction in part-time HE courses delivered at FEIs and, therefore a reduction in the overall volume of part-time HE delivered in Wales.

4.140 While few interviewees were prepared to be specific about changes within the 'mix' of part-time provision, several thought that leisure-focused community education would be particularly vulnerable while there was likely to be a modest growth in technology-related provision and professional development related and other vocational courses.

4.141 Having said this, many interviewees were aware that the policy environment was uncertain. The possible introduction of a cap on full-time student numbers (driven by concerns over Student finance budgets) was seen as a potential game-changer, in that, assuming part-time students were exempt, HEIs might in practice find – for the first time – a part of their credit allocation ring-fenced for part-time provision (in that it was not available for full-time students).

4.142 The other major issue looming on the horizon was the Browne Review of University Funding in England. Most interviewees who commented believed that, given the nature of the full-time HE market, it would be almost impossible for the Welsh Assembly Government to refuse to follow the lead of the UK Government if the cap on flexible fees was lifted. There was less consensus on what this would mean for the balance between part-time and full-time provision. Some interviewees argued that, with full-time fees increased to £5,000 or £6,000, the gap between the capacity to generate fee income for part-time students and that offered by full-time ones would become so great that HEIs would simply not consider offering significant levels of part-time provision. Others believed that, given Wales' generally low incomes, fees at this level would become a major barrier to full-time applications, with even many young people choosing to combine part-time study with work:

'Maybe most of all if the cap on fees is lifted in England and it follows here, then it may become too expensive for many people to study full-time. So part-time will be obvious alternative. The concern there is that

the widening access areas would be hit particularly hard on issues of affordability’.

4.143 A considerable number of interviewees believed that, given this complex situation, HEFCW and the Welsh Assembly Government needed not only to give clearer signals, but also use other means to drive the HE market:

‘It is difficult to argue that [Welsh Assembly Government] as a driving force is doing too much to change that in that they are not placing that much direct pressure on HEIs in Wales in respect of part-time provision. You feel that using the stick must be an option for [Welsh Assembly Government] ...The opportunity is there to take the bull by the horns’.

4.144 However, and returning to the point made at the start of this Section about the highly varied nature of part-time provision, another interviewee stressed the need for the Welsh Assembly Government not just to prioritise part-time provision *per se* but to make clear what this means:

‘If the Government chooses to support part-time study with revised funding for the sector then they will have to decide whether they want to prioritise, new learners, returners or those doing it out of interest. Will it be more on the community engagement side or more on the employer engagement side? Will it be young, middle aged or retired people? These are all major decisions in how funding support would look because these groups will have needs, support needs, that are specific to them’.

5 CONCLUSIONS AND RECOMMENDATIONS

- 5.1 It is clear that the issue of part-time provision in HE in Wales, as elsewhere in the UK, has been rising up the policy agenda for a number of years, in response to global economic changes which increasingly require a society where upskilling and reskilling through life are needed for individuals and economies are to succeed.
- 5.2 At the same time, in seeking to promote the concept of greater part-time HE and to encourage HEIs to be more flexible in the blend of learning opportunities which they offer, it can be argued that the Welsh Assembly Government and HEFCW have not always differentiated clearly enough between the wide range of types of part-time provision which HEIs can and do offer. The fieldwork with Welsh HEIs highlighted very clearly that not only are the levels of part-time provision very different as between Welsh HEIs but also what part-time provision *means* varies quite considerably. In some it is largely about more traditional forms of community outreach, offering a second chance (mostly but by no mean exclusively) to those who have been excluded in the past, and opportunities for self-improvement often unrelated to work or the economy. In others, it is principally about targeted work with employers to tailor provision to their needs, sometimes using public funding to support this and sometimes not (with, in the latter case, the learners not recorded in the data). In others still, the focus is largely on professional qualifications and CPD.
- 5.3 If policy to date does not entirely do justice to the complexity of the picture, it is also the case that rather broad assertions that part-time provision is integrally linked to the Widening Access and the Third Mission agendas, though fundamentally true, also risk missing the point that it is quite possible for HEIs to have robust policies and strategies on both of these without prioritising part-time provision:

- Widening Access is often focused on raising the aspirations of school pupils in areas where very few young people go on to HEI to consider this as an option – in other words, promoting take up of the traditional model of HE but amongst non-traditional groups of learners. This is perfectly legitimate since there is no reason why an 18 year old school leaver from a relatively deprived area should prefer part-time provision compared to an 18 year old school leaver from a relatively prosperous area;
- in terms of the Third Mission, skills development more generally often forms a relatively modest part of such activities, and HEIs could legitimately argue that employers are more interested in HEIs as providing graduate entrants into work and as sources of research expertise than as training providers.

5.4 Conversely, not all part-time provision is closely linked to the priorities of widening access or promoting a stronger economy:

- some part-time provision (for example, some community provision which largely attracts retired graduates) arguably fits with neither agenda, though it may have many social benefits;
- part-time students studying for professional qualifications will generally have a socio-economic and educational profile which is more skewed towards the educational 'haves' than the full-time student population;
- those following humanities subjects on a part-time basis alongside full-time students are benefiting to exactly the same extent from study which is relevant to their long term prospects of making an economic contribution.

So it can be argued that policy needs greater sharpness and clarity.

5.5 At the same time, our analysis of the data, taken together with our fieldwork, suggests that, while part-time provision may not be existentially threatened, since it is too fundamental to the Mission (and it might be argued, market share) of some HEIs, there is a real danger of overall provision continuing to fall over the next few years in the absence

of clear changes to policy. The inclusion of Welsh for Adults learners in the data has masked a fall in the numbers of part-time learners, particularly at undergraduate level in the last couple of years, and (with the exception of the OUiW), those HEIs with the strongest profile in terms of part-time provision have seen sharper falls in the proportion of provision which is delivered part-time.

- 5.6 Going forward, franchised provision through FEIs appears to be particularly vulnerable to cuts. Part-time provision is particularly important for reaching older potential students (with fully 81% of all full-time students being under 25, compared to 21% of part-time students) and attracts a high proportion of female students. But part-time learning in Wales has been less successful compared to full time in terms of reaching people in disadvantaged communities and appears to be concentrated on the humanities and social sciences.
- 5.7 To some extent the move away from part-time learning predates the recession (with part-time undergraduate provision in terms of absolute learner numbers having peaked in 2004/5), though it is clear that the sharp upswing in UCAS applications is now forcing, or may be allowing, HEIs which have hitherto used part-time provision as a way of correcting for lower levels of applications to reorientate the balance of their provision towards full-time students. This suggests that the more fundamental issue at work may be the financial incentive offered by variable fees, and conversely, the fact that HEIs in Wales find it difficult, if not impossible, to charge *pro rata* the same fee levels for part-time students for most courses, even where the employer is paying what (given the use of HEFCW funding credits) is only a residual cost of learning.
- 5.8 At the same time, it is interesting that the trend in average credit volume per learner appears over recent years to have moved in the *opposite* direction to learner numbers, with a sharp upswing in average credit volume over the last couple of years as numbers of part-time students

being enrolled has fallen. Whether this is a result of HEIs cutting back on short courses for businesses or small-credit courses in community education or is a result of other factors, such as a shift in the balance of undergraduate and postgraduate courses is not easy to discern.

- 5.9 Interviewees were unequivocal that, despite the fact that the Graham funding does provide some support for measures to address some of the specific needs of part-time learners, the way in which the balance between costs and income makes it economically rational to prioritise full-time provision (where sufficient numbers can be found) is the largest single barrier to further developing part-time provision. But there are other barriers, including the lack of any 'gateway' to the HE system (other than individual institutions themselves) for those interested in part-time study to mirror the role UCAS offers for full-time applicants, the lack of a level playing field in respect of Student finance and, to some extent, access to facilities such as libraries and support services. There is also the widespread cultural assumption that universities are still about educating young people on a full-time basis, and the fact that, for at least a significant minority of HEIs, part-time provision is still marginal to what they perceive as their mission.
- 5.10 It also appears that HEIs find it difficult, if not impossible, to talk about latent demand and that there is a strong view that, particularly given the general lack of awareness of the role and variety of part-time provision which can and is made available in the population as a whole, supply is still at the stage of shaping demand rather than vice-versa.
- 5.11 There also appears – again, with the obvious exception of the OUiW – to be a lack of investment in distance learning, and this appears to be one part of HE provision where Wales is a net exporter of learners, while, outside Welsh for Adults, Welsh medium provision is very limited, mostly (but not always) more limited than is the case for full-time students.

5.12 However, it is also clear that this research has been taking place at a time when the policy environment for HE is far from static, with a clear steer from the Welsh Assembly Government that a radically reshaped and regionally-focused HE system is wanted and the real prospect of a cap being introduced on full-time student numbers (driven, however, by problems in the Student finance budget rather than issues directly related to the responsiveness of HEIs to policy) which may serve in effect to ring-fence part-time provision.

5.13 Against this background, and in the light of our research, we therefore recommend:

Overall Policy

5.14 **Recommendation 1:** The Welsh Assembly Government and HEFCW need to consider and spell out more fully what types of part-time provision they particularly value and wish to promote, based on a consideration of the types of provision identified in Section 4 of this report.

5.15 **Recommendation 2:** In the light of the discussion following from Recommendation 1 and in the context of the possible cap on full-time student numbers, the Welsh Assembly Government and HEFCW need to consider whether they both want and are able to ring-fence credits for certain types of part-time provision. It is important to recognise that any blanket protection/ring-fencing for part-time provision *per se* may have perverse results.

5.16 **Recommendation 3:** The Welsh Assembly Government and HEFCW should work together to consider how Welsh learners can be offered a greater range of part-time distance learning options. Given the expense and skill required to develop effective distance learning, particularly at undergraduate level, there is a strong argument for recognising the

unique experience of the OUiW in developing, delivering and supporting such provision.

- 5.17 **Recommendation 4:** The Welsh Assembly Government and HEFCW, working with Reaching Wider Partnerships, need to consider whether the work of the Partnerships needs to be rebalanced towards a greater emphasis on potential adult learners, given the evidence that part-time students are less likely to come from widening access areas than full-time ones.

HEIs' Funding

- 5.18 **Recommendation 5:** In the context of its expressed intention to move towards a funding system where the bulk of the funding provided to HEIs consists of Mission funding rather than formula funding, the Welsh Assembly Government, working with HEFCW, needs to consider further whether there is a case for a part-time premium in place of, or in addition to, the current Graham funding in order to offset the fact that *pro rata* fee levels cannot be achieved for most provision, given the requirement for part-time students (or their sponsors) to pay fees up front.

- 5.19 **Recommendation 6:** The Welsh Assembly Government needs to monitor very closely the progress of the Browne Review and to model what different outcomes are likely to mean for Welsh HEIs. Lifting the cap on variable fees will have potentially huge impacts on the landscape of HE in Wales.

Employer-facing provision

- 5.20 **Recommendation 7:** In seeking to promote part-time provision, particularly provision focused on meeting employer needs, the Welsh Assembly Government and HEFCW should consider whether trying to impose a common approach on all HEIs is the correct approach. Rather, taking forward its emerging regional approach, an option would be to

work with HEIs to identify which institutions wish to give priority to this mission and specifically task a small number of HEIs to lead on employer engagement in their region, working closely with FEIs, private providers and the Welsh Assembly Government itself. This may necessitate some reallocation between HEIs of credit volumes.

- 5.21 **Recommendation 8:** In the light of the evidence that HEIs are often providing very directly employer-related provision using HEFCW credits and at low fee levels, the Welsh Assembly Government needs to consider how this fits with its emerging Fees Policy. With HEFCW, the Welsh Assembly Government also needs to consider the appropriateness and feasibility of developing a fees policy or fees assumption for HE provided part-time learning.

Part-time provision and individual learners

- 5.22 **Recommendation 9:** The Welsh Assembly Government should recognise that taking a selective approach towards identifying HEIs with a mission to promote and provide work-related learning does not mean that other HEIs should not be enabled to continue to provide community education type provision. However, particularly in terms of provision which is at a FE level, the Welsh Assembly Government needs to consider whether it feels HEIs should be trying to cultivate and nurture 'home grown' learners or whether rather HEIs should be collaborating more closely with other providers to ensure progression routes are available for previously excluded learners who have entered on lifelong learning routes at low levels but have HE ambitions.

- 5.23 **Recommendation 10:** For individual learners in particular, the Welsh Assembly Government and HEFCW need to consider whether it is possible to develop a national gateway for those interested in part-time learning to complement the UCAS system. Given the recommendations in this direction by the King Review, this should be discussed in the first instance with the UK Government and other Devolved Administrations.

However, if there appears to be little prospect of introducing a UK wide system in the short term, and given the much greater propensity of Welsh-domiciled part-time students to study at Welsh HEIs, the Welsh Assembly Government should consider whether a Welsh portal could be introduced. Given the brand recognition of the Open University, the OUiW should have a key role to play in any such approach.

5.24 Recommendation 11: The Welsh Assembly Government needs to consider how the Student finance system can be made more equitable from the perspective of part-time learners who are financing their own studies, particularly given the fact that ‘full-time’ students are increasingly also working while studying. Given financial constraints, a clear distinction needs to be made between these students and those who are being funded by their employers, even where this relationship is one which does not involve the HEI.

5.25 Recommendation 12: The Welsh Assembly Government and HEFCW should consider whether they need to offer clear guidance on expectations in terms of the opening hours of core facilities and student support services to Welsh HEIs.

Further Research and Data

5.26 Recommendation 13: Given the lack of knowledge and understanding of how far non-completion and non-progression of part-time learners is a result of, on the one hand, personal goals at the start of a study ‘episode’ or, on the other, negative experiences during learning, the Welsh Assembly Government and/or HEFCW should commission longitudinal research following a sample of part-time learners from the start of their learning over a number of years.

5.27 Recommendation 14: Given the difficulty of assessing latent demand, the Welsh Assembly Government should consider whether there is scope for using whole-population survey-based approaches to gauge

understanding and awareness of the possibility of undertaking part-time study at HE level. This might involve using questions in the 'Living in Wales' survey, for example, making use of another Omnibus survey, or commissioning a specific survey. However, we recognise that the costs of such an exercise may well prove disproportionate to the likely utility.

5.28 Recommendation 15: We are not convinced that the way in which Welsh for Adults learners following courses below Level 4 is included in HESA data is helpful and the Welsh Assembly Government and HEFCW should consider whether there are clearer ways of 'flagging' this within the data.