

Impact case study (REF3)

Institution: Birkbeck, University of London
Unit of Assessment: 21
Title of case study: The Lost Part-Timers: influencing policies to stem the decline in part-time undergraduate higher education in England.
Period when the underpinning research was undertaken: 2008-2017
Details of staff conducting the underpinning research from the submitting unit:
Period when the claimed impact occurred: 1 st August 2013 – 31 st December 2020
Is this case study continued from a case study submitted in 2014? N
<p>1. Summary of the impact</p> <p>Professor Callender's research triggered changes in financial support policies for part-time undergraduates in England. Her research, charting the deleterious effects of the 2012/13 student funding reforms on the supply of, and demand for, part-time study, raised awareness and understanding within government and beyond about the need for further reforms. It led directly to the government changing existing policies; implementing a significant new policy; and adopting an innovative policy approach – improving financial aid and facilitating greater access to part-time study. Policymakers have benefitted from her research, alongside higher education (HE) institutions, HE stakeholders, and the thousands of prospective and current part-time students now eligible for the additional financial support.</p>
<p>2. Underpinning research</p> <p>Callender remains one of very few UK academics undertaking large-scale national quantitative studies on part-time undergraduate education. Between 2008 and 2013, she conducted several studies which further consolidated her expertise and understanding of the part-time landscape (refs. 3,4,5,6). This body of research was initiated in a different policy environment, but importantly, formulated and framed the issues affecting part-time study. It identified:</p> <ul style="list-style-type: none"> • the vital social and economic benefits of part-time study contributing to governments' widening participation, social mobility, and national skills agendas; and • the factors determining the demand for, and supply of, part-time study, critically costs, student finances, and government funding arrangements. <p>In the REF2014, Callender submitted an impact case study. It showed how her research influenced and modified the 2012/13 student funding reforms which raised tuition but also, for the first time, introduced fee loans for part-time undergraduates. Simultaneously, her research warned of the potentially damaging effects of these loans.</p> <p>After REF2014, Callender monitored the 2012/13 reforms' impact on part-time undergraduate provision, demonstrating the failure of the new loans to stem the continuous decline in part-time numbers. Whilst Callender's research had predicted such outcomes, they ran contrary to policymakers' expectations. She attributed the loans' ineffectiveness largely to their restrictive eligibility criteria and the 'one size fits all' policy approach which ignored part-timers' distinctive characteristics when compared with full-time students.</p> <p>In 2017, Callender was commissioned by the Sutton Trust to undertake further interdisciplinary research to evaluate the 2012/13 reforms (ref. 1). Callender conducted the study between February 2017 and April 2018 with the economist John Thompson (ex-HEFCE head of Analytical Services) and Callender as Principal Investigator.</p> <p>The study entailed detailed secondary analysis of time-series data on part-time undergraduate UK entrants, mapping changes since 2010 - the last year unaffected by the 2012/13 reforms. It merged two datasets: the Higher Education Statistics Agency (HESA) student records; and the Education and Skills Funding Agency Individualised Learner Record for further education college students. It offered greater insights than any previous analyses.</p> <p>The research conclusively demonstrated that:</p>

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- Between 2010 and 2015, the number of English domiciled part-time undergraduate entrants attending UK universities and English further education colleges halved – which when offset against the continuous rise in full-time entrants, halted total undergraduate growth.
- At least 40% of this fall could be attributed to the 2012/13 reforms.
- Student fee loans exacerbated the decline:
 - most part-time entrants were ineligible for loans because of their restrictive and inflexible eligibility criteria; and
 - of those eligible, 41% of part-timers did not take out a loan compared with 6% of full-timers, often because they were risk and debt averse.
- The greatest falls in entrants were among over-35s, especially women, and those pursuing sub-degree qualifications and short low-intensity courses – typically vocationally orientated and ‘continuing education’ type courses.
- The English part-time sector now is not only smaller but different. The 2012/13 reforms, particularly the loan system’s incentives (favouring the take-up and provision of three-year full-time undergraduate degrees aimed at school-leavers), narrowed the range and flexibility of part-time provision and the characteristics of part-time students.
- Government funding arrangements had hampered access, deterred participation, limited upskilling and reskilling opportunities, while undermining widening participation, social mobility and equity, and ultimately, hindering national skills development and productivity growth.

In sum, the research provided the evidence base for further reforming part-time students’ finances and introducing targeted policies which acknowledge the distinctiveness of the part-time population.

3. References to the research

(All research cited was peer reviewed)

1. **Callender, C.**, and Thompson, J. (2018) *The Lost Part-timers: The Decline of Part-time Undergraduate Higher Education in England*, London: Sutton Trust, 76 pp.
<https://www.suttontrust.com/wp-content/uploads/2019/12/The-Lost-Part-Timers-Final.pdf>
2. **Callender, C.**, and Dougherty, K. (2018) Student Choice in Higher Education—Reducing or Reproducing Social Inequalities? *Social Science*, 7(10),1-28.
<https://doi.org/10.3390/socsci7100189>
3. **Callender, C.** and Wilkinson, D. (2012) *Futuretrack: Part-Time Higher Education Students - the Benefits of Part-time Higher Education After Three Years of Study*, Manchester: HECSU. 93 pp. https://futuretrack_part_time_students_report_oct2012.pdf
4. **Callender, C.** and Wilkinson, D. (2011) *The Impact of Higher Education for Part-time Students*, Evidence Report 36, London: UK Commission for Employment and Skills, 126 pp.
<https://assets.publishing.service.gov.uk/evidence-report-36-impact-of-he-for-pt-students.pdf>
5. **Callender, C.**, Mason, G., and Jamieson, A. (2010) *The Supply of Part-Time Provision in Higher Education in the UK*, London: Universities UK, 72 pp.
<https://www.universitiesuk.ac.uk/policy-and-analysis/reports/supply-of-part-time-higher-education-uk.pdf>
6. **Callender, C.**, Hopkin, R., and Wilkinson D. (2010) *Futuretrack: Part-time Students Career Decision-making and Career Development of Part-time Higher Education Students*, Manchester: HECSU, 132 pp.
https://FUTURETRACK_PART_TIME_STUDENTS_Career_Decision_Making_and_Career_Development_of_Part_Time_Higher_Education_Students

The research was funded through the following grants:

- Feb 2017 - April 2018, £30,000. Decline of Undergraduate Part-time Study in England. Sponsor: Sutton Trust. Grant holder: Claire Callender.
- 22 November 2010 – 31 March 2011, £39,654. Impact of Higher Education for Part-time Students. Sponsor: UK Commission for Employment and Skills. Grant holder: Claire Callender.

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- 6 March 2009– 28 September 2009, £32,308. The Supply of Part-time Provision in UK Higher Education. Sponsor: Universities UK. Grant holder: Claire Callender.
- July 2007 – 30 November 2012, £399,412. Part-time Students - Career Decision-making and Career Development. Sponsor: Higher Education Careers Services Unit, Department for Business, Innovation and Skills, and Foundation Degree Forward. Grant holder: Claire Callender

Details of the impact

This case study shows the impact of Callender's research on policies and debate about financial support for part-time undergraduates. Callender drew upon her previous studies (refs. 3,4,5,6), and a substantive new study (ref.1) to raise awareness and understanding of the limitations of the 2012/13 student funding reforms for part-time study, and of the need for further changes to reverse these reform's unintended consequences. She disseminated her policy critique and possible solutions to policymakers, think-tanks, HE stakeholders, and the media. Callender's research directly led to improved provision and greater access to part-time study through the relaxation of the eligibility criteria for existing fee loans, the introduction of maintenance loans for part-time students for the first time, and the development of a completely new and innovative policy approach – lifelong learning loans. Policymakers, HE stakeholders, HE Institutions, and part-time students have all benefitted. For instance, the Treasury estimates that 150,000 undergraduates each year, enrolling in over 100 English HEIs, will be helped by the new maintenance loans.

Modifying existing policies

In 2012/13 the government raised part-time undergraduate tuition fees, repaid via student fee loans, with part-timer students qualifying for these loans for the first time. As Callender predicted, 2013 HEFCE data showed that these reforms contributed to substantial falls in part-time enrolments in England. Callender immediately marshalled these and other data, alongside insights from her previous research (refs. 3,4,5,6), arguing that loans' eligibility criteria were too restrictive, depressing demand.

She met David Willetts, then Minister of State for Universities and Science (10/5/2010-15/7/2014), and his Special Advisor several times. Callender proposed that to improve loan take-up, loan eligibility criteria had to change. Specifically, that loans needed to be extended to part-time students who did not qualify for loans because they already held an Equivalent or Lower Qualification (ELQ). As Willetts testifies '*....Callender's research was important in helping policy-makers understand it [falling part-time numbers]. As well as analysing the issue she also engaged with us on possible policy responses. She showed the inter-action with the ELQ rules which meant that many mature students who already had a degree were not eligible for fee loans and were therefore particularly badly affected by the fee increase. As a result I took some steps in late 2013 to broaden the range of disciplines which were exempt from ELQ rules.* (source 1). The policy change, which extended fee loans to part-timers wanting to take a second degree in engineering, technology, and computer science, was announced by Willetts at the Conservative Party Conference (30/9/2013) and came into force on 1 August 2015.

Callender continued gathering the mounting evidence on the deleterious impacts of the 2012/13 reforms on part-time students and part-time provision. To influence the policy agenda, she disseminated these findings alongside policy solutions through think-tanks (e.g. Higher Education Policy Institute (source 5), BrightBlue, Bridge Group); stakeholder meetings and keynotes at UK and international stakeholder conferences (e.g. Student Loans Company, Social Mobility Commission, Universities UK, NUS, University Alliance, Open University, Universities Association for Lifelong Learning, National Association of Student Money Advisers) (source 6a,b); articles in the HE (e.g. THE, WonkHE,) and general press (e.g. Guardian, Prospect); media interviews (source 6c,e,f); and academic publications (source 6d). Her advice was sought, at this stage and later in the policy making process, from international and UK policy advisors.

Callender met Jo Johnson, then Minister of State for Universities, Science, Research and Innovation (11/5/2015-9/01/2018) and his team on several occasions when she demonstrated that the fall in part-time entrants after the 2012/13 reforms represented an alarming trend. Johnson confirms the importance of Callender's research in the area. He wanted *'to introduce policy changes to mitigate this trend. Professor Callender's research charted the problem and pointed to solutions. It informed and influenced my Department's thinking and led directly to two significant changes in policy'* (**source 2**): modifying fee loans - an existing policy; and introducing maintenance loans - a new policy.

Johnson continues *'Firstly, Professor Callender's research made clear that the eligibility criteria for loans needed to be broadened so more part-time students would benefit from them. Our government used its powers to modify the loans provision and extended the ELQ exemptions.'* (**source 2**). On 1 August 2017, fee loans were extended to include part-time students wishing to take a second degree in all STEM subjects.

Introducing a new policy

The Chancellor announced another important policy change in his 2015 Spending Review and Autumn Statement (25/11/2015). *'Following a sharp decline in part-time students since 2008, the government will introduce new part-time maintenance loans from 2018-19 to support the cost of living while studying. The government expects 150,000 part-time students could benefit each year by the end of the Parliament'* (HM Treasury, Spending Review and Autumn Statement 2015, Cm 9162, para.1.183).

Again Johnson, the Minister responsible, confirms the instrumental role of Callender's research in the creation of this new policy. *'Secondly, and perhaps more significantly, as a result of her work on the financial pressures that act as a deterrent to the uptake of part time study, our government introduced new maintenance loans for part time students. This was an important change, not least because it attached an importance to part-time study that had heretofore been overshadowed by the debate around the funding of full time students.'* (**source 2**). This policy was introduced on 1 August 2018.

2017/18 HESA data show an upturn in part-time Bachelor degree first year students for the first time since 2012/13. By 2019/20, numbers had increased by 25% from the all-time low in 2016/17.

Influencing an innovative policy approach

The Post-18 Review of Education and Funding chaired by Lord Augar, launched by the then Prime Minister Theresa May in February 2018, was tasked, *inter alia*, with encouraging more flexible learning and explicitly included part-time study. The Department for Education (DfE) invited evidence from Callender to support the Review. Callender's submission (**source 7a**) drew heavily on her research (ref. 1) as did those submitted by for instance, Birkbeck, the Open University, the University Alliance, the Nuffield Foundation, Education Policy Institute, NUS, Goldsmiths, and others. Callender called for a radical overhaul of part-time student finances.

The DfE also commissioned NatCen Social Research to conduct a study for the Augar Review to assess demand for part-time education among prospective students and how they made educational choices (**source 7b**). Callender was appointed the academic consultant for the study.

Callender continued engaging in wide ranging dissemination activities to enhance her research's (ref.1) impact and to further influence the Review's outcomes (**source 6**). Her 2018 study (refs. 1, 2) was heavily cited and utilised to inform briefings and debates in the House of Lords and the House of Commons; in oral and written evidence presented to and used by the House of Commons Education Select Committee, the House of Lords Economic Affairs Committee, the Civic Universities Commission (**source 8a,b**) and publications from the HESA, OfS, CBI, DfE,

think-tanks (e.g. The Resolution Foundation) and other HE stakeholders (**source 8c**). Its impact is further substantiated by for instance, the Vice Chancellor of the Open University who when discussing the reach of Callender's research asserts that it '*has undoubtedly helped the sector, and the OU, to turn up the dial with the UK government..and press for recognition and policy changes that have so far been made*' (**source 4a**).

The Augar Report was published in May 2019 (**source 9**). Professor Alison Wolf, a Review member states that '*Callender's work was of great importance to the panel and the single most important source of research and policy analysis for our consideration of part-time higher education... We found Professor Callender's report *The Lost Part-timers...*(2018) and the evidence she submitted to the Augar Review to be of particular value. They are cited prominently in the published report, reflecting this influence, and in particular fed directly into our headline recommendations for greater flexibility in the student loan system'* (**source 3**). Specifically, Augar proposed lifelong learning loans which would replace existing loans and remove current loans' perverse incentives by scrapping remaining ELQ restrictions and allowing loans for modular credit-based qualifications, directly as advocated by Callender.

On 29 September 2020, the Prime Minister announced the government would introduce a flexible lifelong learning loan entitlement, as part of its lifetime skills guarantee and wider skills package. The commitment was confirmed in the government's much delayed 'interim conclusion' to Augar, and in the Further Education White Paper, published on 21 January 2021, just after the REF impact deadline. Callender has been invited by the DfE to become involved in the planned consultation on the lifelong learning loan entitlement.

5. Sources to corroborate the impact (indicative maximum of 10 references)

Testimonials

1. David Willetts
2. Jo Johnson
3. Professor Alison Wolf, Baroness Wolf of Dulwich
4. Other HE stakeholder testimonials: a) Open University; b) Office for Students; c) University Alliance; d) NUS.

Other sources of evidence

5. Callender, C. (2015) Putting part-time students at the heart of the system? in N. Hillman (ed) *It's the finance, stupid! The decline of part-time higher education and what to do about it*, Oxford: HEPI,16-14
6. Dissemination activities – August 2013- December 2020. a) Meetings with stakeholders; b) Presentations at stakeholder conferences/events; c) Articles in the HE and general press; d) Peer reviewed articles; e) Live media interviews; f) Press coverage.
7. a) Callender's evidence submitted to The Post-18 Review of Education and Funding; b) NatCen Social Research report commissioned for the Review
8. Evidence of Callender's a) Involvement in House of Lords and Commons select committees, and citation of ref 1 in parliamentary debates; b) other inquires; c) citations of ref .1 in stakeholder publications.
9. Copy of Augar Review Final report with quotes and citations of Callender's research.