



**RESEARCH INTO THE NEED AND
DEMAND FOR HIGHER EDUCATION
PROVISION
IN HEREFORDSHIRE**

DECEMBER 2008

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1. EXECUTIVE SUMMARY

The field research aspect of this research took place during a period of turmoil for the UK economy evidenced by a 17% fall in the FSTE100. Despite this employers remained cautious in the short term and positive in the medium term in regard to their business challenges, acknowledging that staff development has a key role to play in meeting these challenges. There is consistency in where employees (58%) and employers (65%) see their skills gaps as being business management and technical disciplines, principally at the middle management level but pervading the whole organisation from shop floor to board room. A strong market exists for leisure learners, especially in the arts with 23% of employees interested in courses. Overall total HE market potential is over 12,000 learners with a large proportion being in the difficult to reach micro sector.

Accredited FE/HE courses have only a 28% share of the total professional development market and this is set to grow as the majority of employers begin to consider HE accredited tailored modular programmes. Whilst most employers are happy for courses to run alongside the current semester/term structure, 27% of employers have a need for short intensive programmes (2 days to 2 weeks). Currently employees' qualification levels are split 70% undergraduate to 30% post graduate. Employers state clearly that they are prepared to invest to see a reverse in that ratio leading to a rapidly increased demand for post graduate provision in the lifelong learning sector.

Key to employers needs was learning through experience. Most employers preferred to have learning delivered externally (mostly to benefit from peer learning and gaining new perspectives) and this learning had to be delivered by credible academics with current practice and an applied approach to learning. Learning should be delivered away from the employer's premises with a strong preference for a location in Hereford. Workshops should be held on a weekday or evening basis and learning should be augmented with flexible high quality learning materials, high levels of tutorial support, and assistance in developing HE-level study skills. Employers insisted that learners should have an evaluation of their practice in the workplace, particularly with organisational projects that are driven by their studies and evaluated in practice to bring a valuable skill to benefit the learner's career and the organisation's performance.

Employers are ambivalent towards HE and lack awareness of the qualifications structure and what benefits it could hold for their organisations. During the course of the interviews further explanation of qualification types and structures lead to increased interest. However, we must consider employer priorities and talk about the skill and its benefits to the business first, and the qualification's benefits for the employee second.

There is a distinct split in terms of programmes required by employers. 22% of the market falls into non-accredited short courses run by private providers and this is not an area where HEIs should be focusing their efforts (employers see this as the core domain of the privateer). The area of focus for HEIs should be the programmes currently being provided in house by employers which do not lead to accredited qualifications. This represents around 50% of the total market and employers are mostly keen to see these programmes provided by HE to a higher and more consistent standard, working with a wider range of businesses (to encourage peer learning), with possible cost sharing benefits.

In order to access this market flexible courses should be shaped to address employer and employee needs (but not transformed into training courses), delivered by professional and credible staff, supported by a customer focussed interface. Key to reaching the full potential that this market has to offer is to dramatically improve our communication with employers and employees alike to make clear the benefits of HE programmes on offer. A 'personal shopper roadshow' approach could benefit all employers as they seek to navigate skills and qualifications they know that they need but do not understand.

Field	Employers	Employees
Ambition and progression	Moving up the career scale from administrative/professional to management/ownership through UG and PG qualifications, possibly onto research	Moving up the career scale from administrative/professional to management/ownership through UG and PG qualifications, possibly onto research
Motivation	Improvement and growth	Personal fulfillment and job satisfaction
Purchasing influences / key criteria	Relevance of course and reputation of faculty	Timing and flexibility of modular programmes
Learning pattern	Always weekday, 57% prefer evenings	Mainly term-time and weekday. Some interest in Summer schools
Learning methods	Widely varied but based on regular lectures and tutorials (based from FE premises)	Widely varied but based on regular lectures and tutorials (based from FE premises)
Duration	27% short intensive, 73% longer part-time	40% short intensive, 60% longer part-time
Accreditation	Not always necessary (increased cost and duration)	Fully
Financial benefits	Efficiency and improvement	<ul style="list-style-type: none"> • £2,710 after 2 years • £5,432 after 5 years • £9,476 after 10 years
Needs	Leadership and management	Leadership and management
Competition	In house and private providers	Specialist HEIs, professional bodies and private providers
Are we 1 st choice?	56% yes	60% yes
Communication	26% PR/advertising and 58% personal networks	50% PR/advertising and 37% personal networks

Table 1: Summarised comparison of findings

2. BACKGROUND

This research seeks to understand the current and emerging needs for Higher Education in Herefordshire. It will complement existing research (cited below) by focusing on the needs of part-time learners. Meeting the current and developing HE needs of Herefordshire directly supports the development objectives stated by:

- University of Worcester Strategic Plan 2007-2012¹
- Higher Education Funding Council - Lifelong Learning Network for Herefordshire and Worcestershire 2006-9²
- Learning and Skills Council Herefordshire and Worcestershire Annual Plan 2007-8³
- West Midlands Regional Skills Partnership – Introduction and Priorities, 2005⁴
- Herefordshire Partnership – Local Area Agreement 2006-9⁵
- HM Treasury - Lambert Review of Business-University Collaboration, 2003⁶
- HM Treasury – Leitch Review of Skills, 2006⁷

The need for this research

HE from the employer's perspective

Higher Education is defined as any course or programme leading to credit or an award at level 4 or higher of the National Framework for Higher Education Qualifications. Need, demand and attitudes of learners from the perspective of traditional progression routes (6th form and FE College) are well-understood and relatively predictable. Recruitment via these routes is resourced at Institutional level by initiatives such as Aim Higher and traditional HE outreach engagement and promotional activity (e.g. Widening Participation, Schools and

Colleges Liaison Officers). Less well understood are employers' needs for HE, both for upskilling of their existing workforce (Continuing Professional Development) and their expectations of the capabilities of new graduates (employability skills). The need for general softer skills (communication, team working, customer service) is well evidenced¹⁰. This research seeks to understand the needs for technical, practical or job-specific skills important to employers in the County where there appears to be latent demand for part-time study and a clear preference for vocational courses, provided that identified accessibility issues can be addressed⁹.

Nature of demand: displacement

In any market study we must be careful to differentiate between what constitutes latent demand and what new marketing activity will cause displacement from other HEIs. This research will inform capital investment, additional student numbers bids, and curriculum development. This must be done in a manner that presents best value options to the customer.

Role of the employer as HE champion

A recent study⁹ shows that general aspiration towards HE are limited by a general population with little or no experience of HE. As learners mature and go to work career influences in the workplace have the potential to become a powerful tool in the drive towards lifelong learning. This survey will seek to understand how employers can contribute towards shaping HE to meet their current and emerging needs. It will test the appetite of employers to participate actively in the development and delivery of a work based learning framework.

Gaps in previous research

The 2005 HEFCE-funded study⁹ targeted school leavers, the general population and private sector employers with more than 10 employees. This approach ignored an important audience for our study, micro private organisations (<10 employees) and Public Sector organisations, which together account for 45% of the active sub-regional workforce¹¹.

The study also took a limited random approach to sampling businesses in Herefordshire. Seven interviews were conducted and 85 surveys were completed. Respondents were not profiled other than by the size of their organisation and the sector in which they operated. In order for higher education providers to make a relevant offering to the target audience this survey we need to understand the location of the demand, the scale and trend of the demand,

The HEFCE study focuses in the current situation of the respondents. In order to meet emerging needs it is important to understand employers' aspirations.

Marketing tools

Much is said of distance, accessibility, and suitability of courses⁹ as being factors that limit participation in HE without any clear recommendations as to how these deficiencies could be adequately addressed. This could become more acute as we target part-time learners.

Research Outcomes

- Increased employer engagement in shaping the future of HE provision for Herefordshire
- Increased accessibility and student support for part-time learners in HE
- Increased graduate retention

Research Outputs

- Quantification and location of demand in target segments.
- Understand the full service marketing mix (product, price, place, promotion, people, process and physical evidence) required to provide an excellent student experience for part-time learners in Herefordshire.

3. METHODOLOGY

Secondary References

The following current studies of Herefordshire are referenced:

- Regional profiles of higher education, HEFCE 2007⁸
- Options for higher education in Herefordshire, Powys and Shropshire, HEFCE 2005⁹
- Skills: Herefordshire and Worcestershire, West Midlands Regional Observatory 2006¹⁰
- The State of Herefordshire Report, 2007¹¹

The studies are important baselines from which we could formulate a forecast of demand.

Primary Methodology

Catering for different audiences

Primary research activity progressed in parallel streams. Previous research^{13 14} has identified the importance of considering the needs of the *customer* (in this case the employer who will have different challenges facing their organisation and as such changing skills, experience and qualification¹⁰ needs for their workforce) and the needs of the *consumer* (in this case the employee who will make many employment and career changes during the course of their working life).

Data gathering

The potential complexity of employers' needs necessitated a semi-structured interview approach. This helped the interviewer to probe and examine points of interest (particularly around longer-term needs) and initiate a relationship between the employer and the Herefordshire and Worcestershire Lifelong Learning Network.

Employees were sampled from within the employers' organisations using online questionnaires. This will allow for a comparison of findings around the marketing mix aspects of this research. All respondents qualified for a £10 Amazon.co.uk gift voucher.

Sampling

This research took a quota sampling approach to ensure that our findings (from a need and demand perspective) are representative of the County's current profile (stratified employment, location) with a focus on selected sectors that are identified as *established* or *emerging*^{9, 10, 11}. This approach allowed extrapolation for demand forecasting purposes.

Organisations were identified through a combination of sources:

- *Financial Analysis Made Easy*, a financial database of major public and private British companies administered by Bureau van Dijk Electronic Publishing.

- Public sector organisations were identified through the State of Herefordshire Report 2007¹¹ and through existing links at UW
- Micro organisations (<10 employees) were identified through Chamber of Commerce
- Voluntary and Community Sector were identified through existing social enterprise links at UW
- Contacts from Herefordshire Council's Economic Development Department

Pilot study

A pilot study of 5 micro businesses (5 employees) tested the methodology.

Limitations

The design of this research excludes the economically inactive which equates to 32% of 16-74 year olds, or 39,943 people. Separate research should be undertaken to this audience.

Only 29 organisations who were contacted to participate in this study refused to do so. This represents an interview request success rate of 65%.

Ethical issues

Employee data as it relates to employers were anonymised to ensure confidentiality. To allow pairing of data, employer identities were identified by a letter (i.e. A, B, C, etc.) and respondents were allocated an alpha-numeric (i.e. A3, B7, C10, etc.) to link them to their employer.

Sample Location

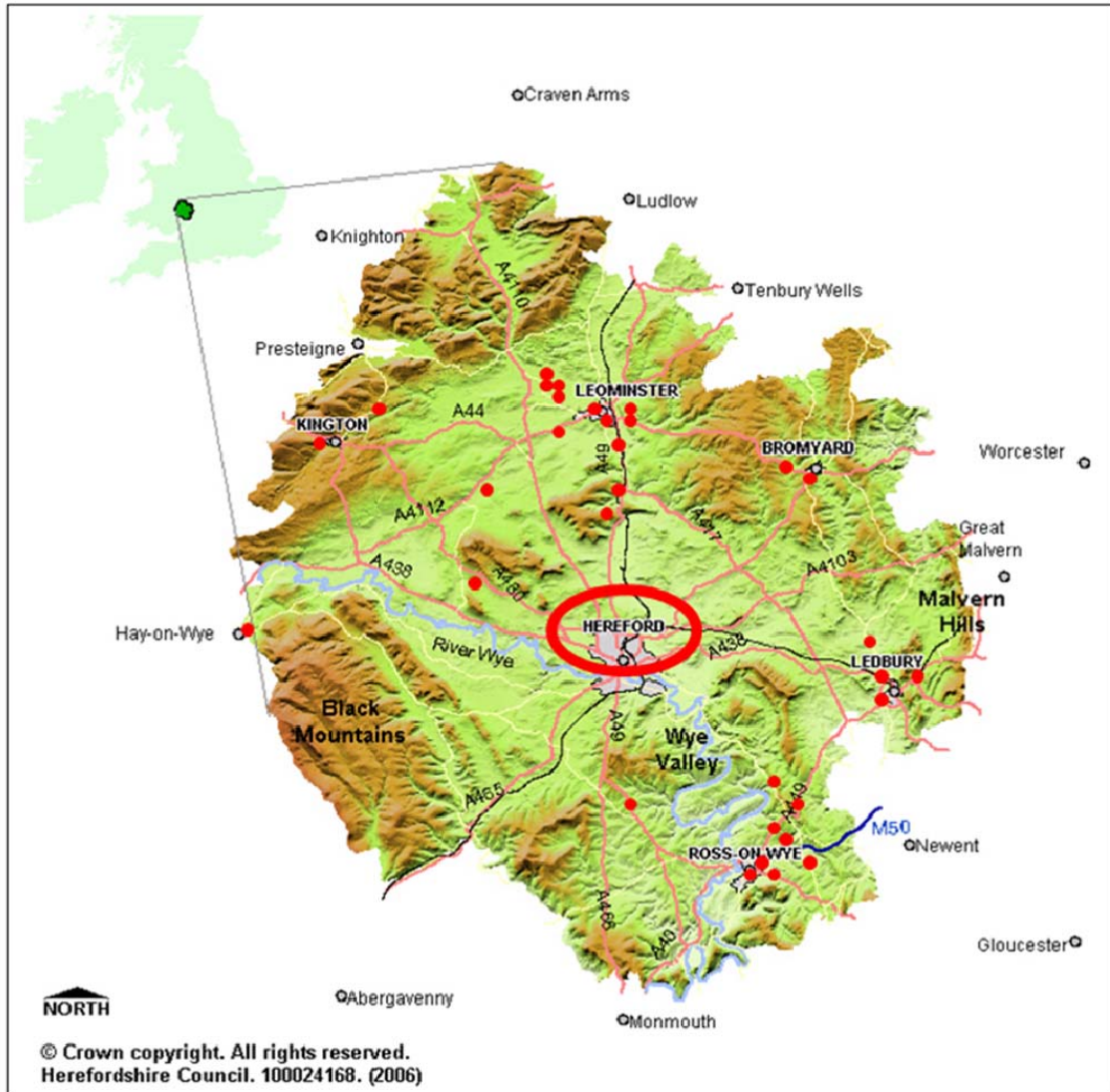


Chart 1: Location of Sample Organisations

Structured Sample

Sector		Sampling Rationale					Other quota considerations		
		Organisations ¹¹	% ¹¹	Interviews Actual v. Target	Employees ¹¹	% ¹¹	Questionnaires Actual v. Target	Key segments ¹⁰ (Actual v. Target)	
Public Sector	Public administration and defence	98	1.3	3 v. 4	2,473	3.8	3 v. 20	<ul style="list-style-type: none"> Health and social work (7 v. 4) Education (6 v. 4) Construction (3 v. 4) ICT and telecommunications (3 v. 4) Public administration (3 v. 4) Wholesale and retail (3 v. 4) Business services (3 v. 4) Hotels and catering (2 v. 4) Leisure and tourism (7 v. 4) Engineering and manufacturing (12 v. 4) Land-based industries (3 v. 4) Creative industries (3 v. 4) 	
	Education	204	2.7	3 v. 4	5,167	7.8	12 v. 20		
	Health and social work	343	4.5	2 v. 4	8,705	13.2	5 v. 20		
Private Sector	Micro (1-10)	6,038	79.0	8 v. 20	18,133*	27.5	10 v. 40		
	Small (11-49)	651	8.5	15 v. 4	4,500*	6.8	14 v. 15		
	Medium - (50-199)	112	1.5	9 v. 4	5,600*	8.5	2 v. 35		
	Large (200+)	15	0.2	2 v. 4	19,700*	29.9	5 v. 40		
Voluntary and Community		c. 180**	2.3	13 v. 10	c. 1,550*	2.5	44 v. 30		Major locations (Actual v. Target) <ul style="list-style-type: none"> Bromyard (2 v. 2) Kington (2 v. 1) Hereford (29 v. 32) Ledbury (5 v. 4) Leominster (11 v. 6) Ross-on-Wye (6 v. 9)
TOTAL		7,641	100%	55 v. 54	65,828	100%	95 v. 220		

*estimated using national average¹²

**<http://findgroups.org.uk/>

Table 2: Stratified Sample Structure

Timing

	2008																										
	Mar			Apr				May				Jun				Jul			Aug			Sept					
Approval of research proposal	■																										
Finalise questions and response options					■	■																					
Pilot 5 interviews and 5 questionnaires									■	■	■																
Analyse results									■	■	■																
Improve methodology									■	■	■																
Contact desired respondents by telephone to secure participation									■	■	■	■	■	■	■	■	■	■	■	■	■						
Conduct 50 interviews									■	■	■	■	■	■	■	■	■	■	■	■	■						
Email 215 questionnaire URLs									■	■	■	■	■	■	■	■	■	■	■	■	■						
Analyse results																				■	■						
Report to audience																					■						
Work Plan (days)	1	2	3	2	1	2	4	2	2	4	5	3	3	3	4	3	7	0	0	3	1	3	0	2	2	3	5

Table 3: Research Time Plan

Project management: research design, data analysis and reporting

Andrew Corcoran's commercial career covers 21 years where he has worked in various management functions within the Manufacturing (1986-2001) and Higher Education (2001-2007) sectors. He is a Fellow of the Chartered Institute of Marketing and an Associate of the Institute of Directors. Andrew has a Diploma in Company Direction, a Master of Business Administration degree from Aston Business School, and is both a Chartered Marketer and a Fellow of The Royal Society for the encouragement of Arts, Manufactures and Commerce.

Recent market research projects that Andrew has delivered include:

- Leadership and Management Short Course Need and Demand in Herefordshire and Worcestershire – University of Worcester, January 2007¹⁴
- Business Incubation Needs in Worcestershire – University of Worcester, July 2007
- Health and Social Care Needs in Herefordshire and Worcestershire – University of Worcester, November 2007¹³

For further discussion regarding this report or its component data Andrew can be contacted at the University of Worcester by email at a.corcoran@worc.ac.uk or by telephone on 01905 855430 or 07795 360294.

Budgeted Cost*

Andrew Corcoran's University of Worcester time 30 days at £367 per day (salary plus 100% overhead)	= £11,010
Andrew Corcoran's private time 25 days at £400 per day	=£10,000
£10 amazon.co.uk voucher for 274 respondents	= £2,740
Payment of internal provider for facilitation of online questionnaire	= £750
Travel (2,700 miles @ 40p per mile)	= <u>£1,080</u>
TOTAL	= £25,580

Actual Cost*

Andrew Corcoran's University of Worcester time 45 days at £367 per day (salary plus 100% overhead)	= £16,515
Andrew Corcoran's private time 25 days at £400 per day	=£10,000
£10 amazon.co.uk voucher for 156 respondents	= £1,560
Travel (2,123 miles @ 40p per mile) plus parking charges	= <u>£870</u>
TOTAL	= £28,945

Project came in at £3,365 (13% over budget and two months later than scheduled. This occurred as the interview programme overlapped the late July and August holiday season reducing the availability of interviewees.

4. FINDINGS

Questionnaire for employers

1. *What are your key business challenges?*

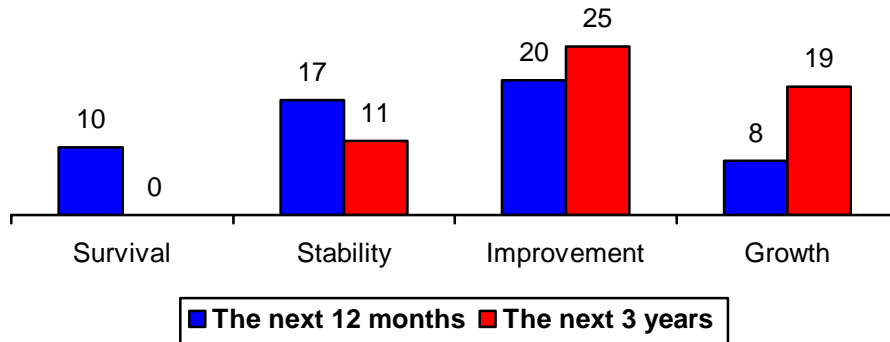


Chart 2: Key Business Challenges

Responses demonstrate a cautious outlook for the next 12 months. Subsequently all respondents told of their development and growth ambitions in the medium term.

2. *What skills/experience/qualifications need to be developed in your existing workforce to cope with these challenges?*

Requirements remained consistent across the cycle and spread evenly from Administrative, Clerical and Secretarial grades to Senior Management/Director. The most popular skills requested were:

- Leadership and management (27%)
- Finance (11%)
- Marketing (11%)
- IT (10%)
- HR (6%)

More specific in-grade requirements included:

Administrative, clerical and secretarial	– Customer service, administration, IT
Associate professional and technical	– IT
Professional	– Finance, HR, marketing, management
Team Leader	– Leadership and management
Senior Management/Director	– Finance, management

3. *How do you currently address these skills gaps?*

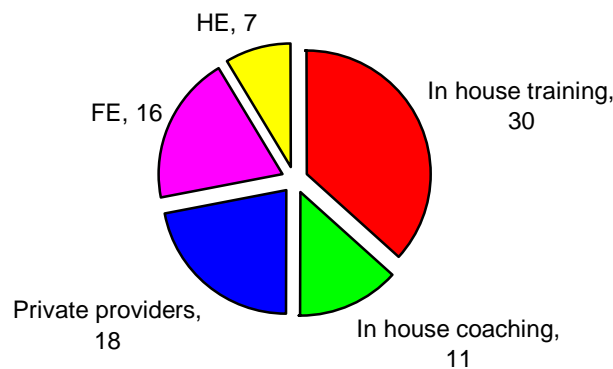


Chart 3: Addressing Skills Gaps

All employers offer some form of training programme which ranges from coaching to Investors in People accredited staff development programmes, with at least three in-house 'Academies'. It is useful to note that where formal training courses are run (either in house or by external providers) that 66% of programmes carry no formal HE/FE/awarding body accreditation. From the responses to Question 16 there is a clear demand for accredited training.

4. *To what extent do you invest in developing your employees?*

All employers contributed time and money in some proportion to the development of their employees. The most popular model was fully funded and either day release or flexible working which is offered by 66% of respondents. The remainder of employers were also supportive of part-time workers and those seeking qualifications that were not to be core to their role and as such made a contribution towards the funding and study leave required.

5. *What is the key return on this investment?*

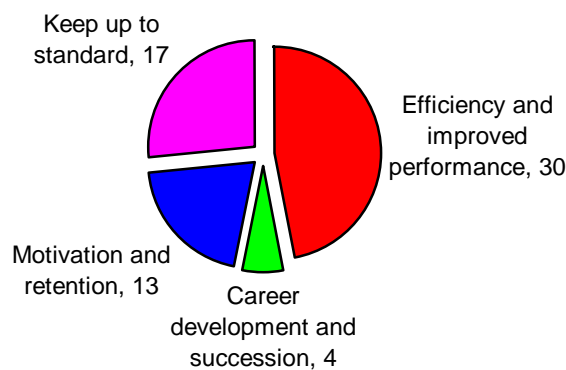


Chart 4: Key Return on Investment

Maintaining and improving the day to day performance of the organisation is the main motivator of 73% of responses which emphasises employers' focus on improving their staffs' ability to add value. The remainder cited more humanistic goals of career development, motivation and retention.

6. *How would you like your employees to gain these skills in the future?*

28% of employees envisaged no change in how training and development support was delivered in their organisation. Considering that the majority of formal training courses are run in-house, 58% employers say that to improve performance more external training courses will be sought.

7. *To what degree would you consider collaborating with other employers to commission training and higher education?*

49% of employers were keen to explore this opportunity with benefits ranging from shared costs in the delivery of more relevant training to wanting to share experiences and knowledge with other employers. 29% of employers already collaborated along similar lines.

8. *What are the key skills/experience/qualifications you are seeking in new employees (possibly graduates)?*

Employers were evenly split on the perceived benefits of graduate employees to their organisation. This is clearly an opportunity for the LLN partners to begin a programme of awareness-raising of the benefits of graduate level skills. 51% of employers lamented the perceived low level of technical, communication and customer facing skills of new graduates. By far the strongest need was for new graduates to have some practical experience of working within a business environment (44% of employers).

9. *How well does HE meet you needs for higher level skills development?*

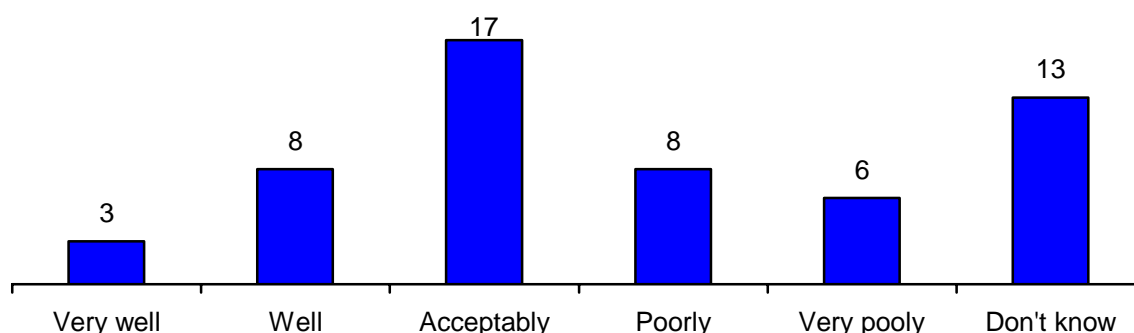


Chart 5: Meeting Employers' Need for Higher Level Skills Development

On the whole employers were satisfied but not delighted with the contribution that HE makes to their organisation. Worryingly 24% of respondents were unaware of the benefits of HE.

10. *How could this be improved?*

Opportunities for the improvement of HE in the eyes of the customer fall into two broad categories: product (72%) and service (28%). Product improvements were need in the areas of:

- Teach skills that are relevant to business (46%)
- Provide more flexible and more accessible courses (26%)

Service improvements were needed in the areas of:

- Better communication of the course offering and its benefits to business (14%)
- Improved service and processes (14%)

11. *What level of qualification would you like your employees to work towards*

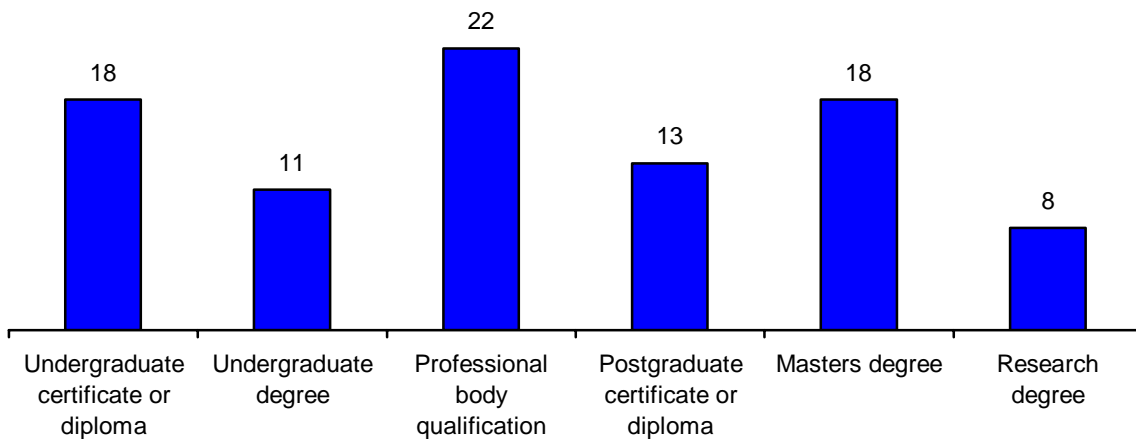


Chart 6: Qualification Ambitions

12. *To what extent would you prefer employees to study bespoke modular programmes rather than for a generic qualification?*

88% of employers preferred a modular approach that enabled them to pick and choose courses to meet their needs, with learning being flexibly structured to fit into the larger awards requested in Question 11.

13. *Over what period of time?*

27% of employees requested shorter, more intensive courses ranging from two days to weeks in duration. Generally there is satisfaction at taking modules on a term or semester basis.

14. *How would you like this to be delivered?*

- Location – 75% preferred training to take place off site, of these 92% preferred a location in Hereford for convenience, accessibility and to minimise ‘lost’ travel time that might be required for a journey to Worcester.
- Courses should always take place during weekdays as employers are unwilling to encroach on their employees’ weekends. 57% prefer evening courses over day time courses.
- Distance learning materials and e-learning packages were requested by 69% of respondents to augment teaching and replace it if necessary when sessions were missed due to other more pressing commitments.

15. *How would you prefer learning to be evaluated?*

20% of respondents believed that traditional examination/assignment evaluation helped to develop better communication skills, and the portfolio of evidence approach was preferred by those more familiar with the requirements for National Vocational Qualifications (14%). However 45% of employers preferred a work based learning approach that evaluated how an employee gained a skill and employed it within the workplace to gain a tangible benefit for the organisation as well as a valuable learning opportunity for themselves. 10% of employers wanted their employees to gain accreditation of prior experiential learning for practical and valuable skills deployed on a daily basis that were not accredited due to the predominant trend of using unaccredited training providers (see Question 3) which would in turn enable them to reach their development goals (see Question 11).

16. *Would you like the University of Worcester to accredit training delivered in house and/or supplied by private providers?*

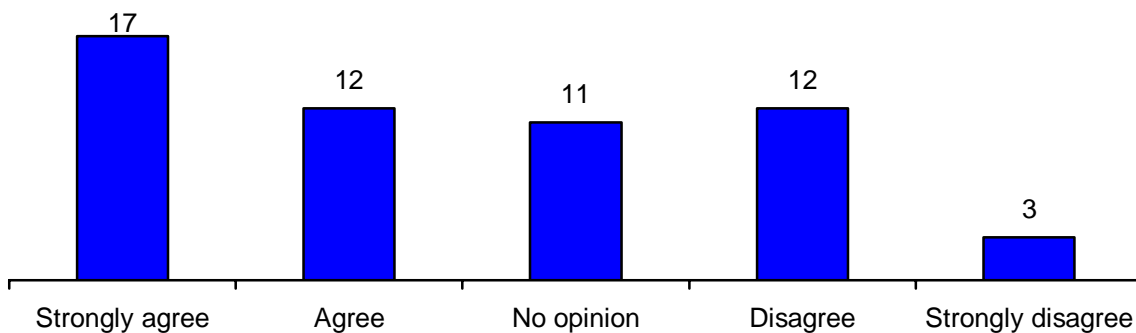


Chart 7: University of Worcester Accreditation of Private Providers' Courses

53% of employers were positive towards this proposal with 27% remaining unconvinced. The remainder did not see the benefit of holding the qualification but were unanimous in the benefit of holding the skill. When pressed employers stated that they were either concerned about losing employees as a result of their achievement (reward issues within the organisation) or that they considered the process of evaluation would add unnecessary cost and time onto the training process. As suggested in Question 9 this could also be another theme for an employer awareness campaign.

17. Given the right mix of delivery, accessibility, and suitability of courses how many of your employees would engage in HE and to what extent?

Sector		
Public Sector	Public administration and defence	10% = 247
	Education	14% = 723
	Health and social work	27% = 2,350
Private Sector	Micro (1-10)	26% = 4,715
	Small (11-49)	25% = 1,125
	Medium - (50-199)	16% = 896
	Large (200+)	9% = 1,773
Voluntary and Community	Voluntary and Community	31% = 481

Table 4: Potential Levels of Participation by Sector

Segment	
Business services*	60%
Construction*	6%
Creative industries	22%
Education	15%
Engineering and manufacturing	19%
Health and social work	28%
Hotels and catering*	11%
ICT and telecommunications*	33%
Land-based industries	10%
Leisure and tourism	14%
Public administration	10%
Wholesale and retail	8%

* skewed sample towards smaller employers

Table 5: Potential Levels of Participation by Segment

Location	
Bromyard	23%
Kington+	58%
Hereford	19%
Ledbury	20%
Leominster	11%
Ross-on-Wye	11%

+ skewed by small sample

Table 6: Potential Levels of Participation by Location

Whilst demand is higher in some areas mean average demand equates to 18% of the workforce over an average 2 year qualification.

18. *What support do you believe is crucial for part-time learners to succeed in HE?*

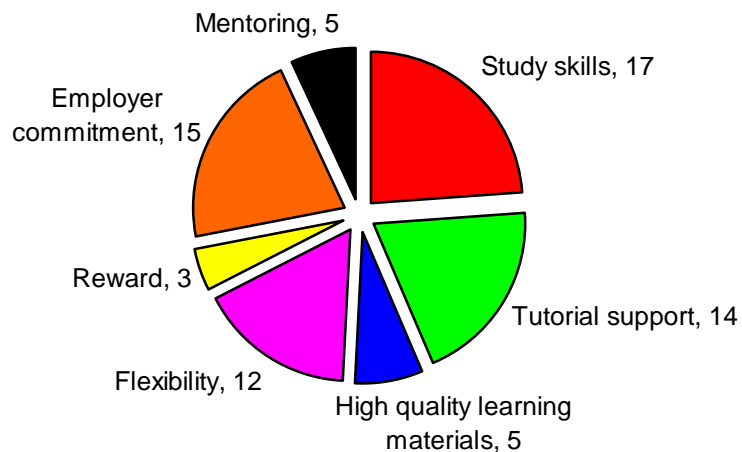


Chart 8: Essential Support for Part Time Learners

Though 73% of employers insisted that students had to be provided with the necessary learning skills, tutorial support and flexible learning materials, they also said that it was the employer's (27%) responsibility to provide encouragement and mentoring support in the workplace for the learner to assure their success.

19. *Would you actively encourage your employees to work towards an HE qualification?*

72% of employers positively encourage their employees.

20. *Would you be prepared to engage with HE on a regular basis to shape their course offering?*

84% of employers would engage.

21. Which other University or College services would you use?

51% of employers would use the facilities (principally room/space hire and library) in Hereford or Worcester and a further 15% of employers would use the facilities just in Hereford.

22. How do you know about the University and Colleges in Herefordshire?

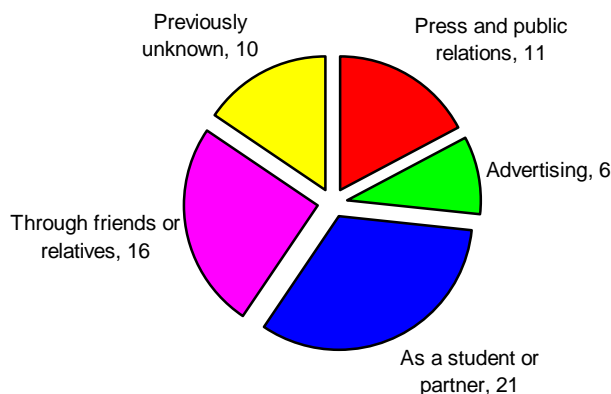


Chart 9: Employers' Previous Knowledge of HE in Herefordshire

23. Would the University and Colleges in Herefordshire be your first choice for career development programmes?

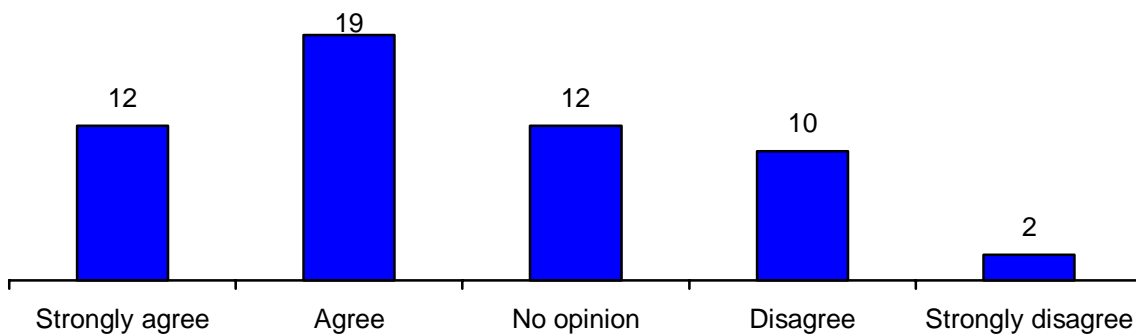


Chart 10: Employers' First Choice for CPD Programmes

24. What short course providers would you use?

Private providers remain the most popular choice for external training courses (31%) followed by FE (26%) and HE (17%). The Chamber of Commerce/Business Link (15%) and Professional/Trade Bodies (11%) complete the field.

25. What Colleges/Universities have you previously been involved with and how likely are you to use them again?

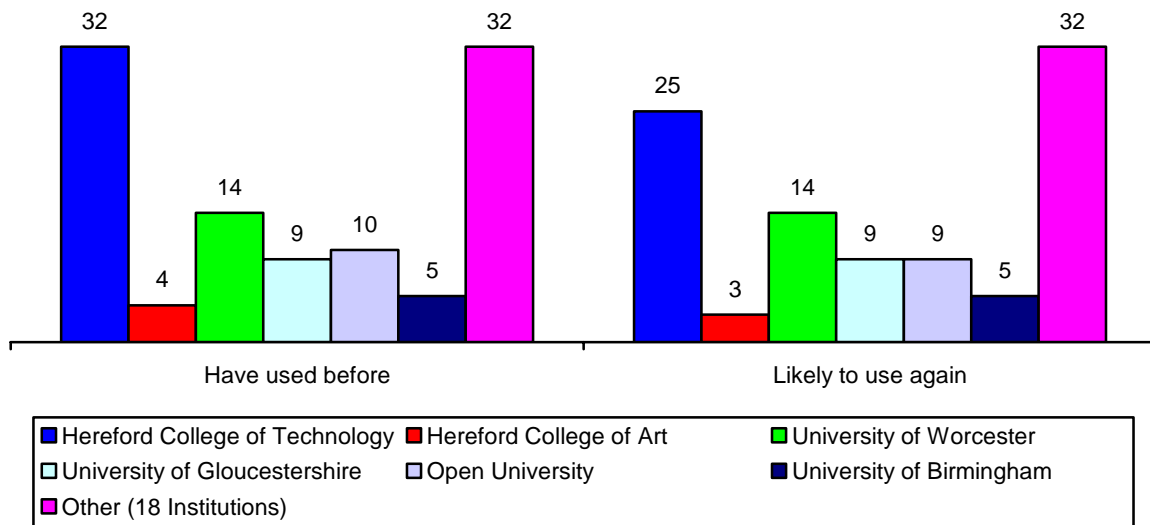


Chart 11: Employer Relationships with FEI/HEIs

29% of all FE/HE usage takes place in Herefordshire proper (HCT and HCA) with an additional 19% of purchases made within the Herefordshire and Worcestershire sub-region (University of Worcester and Worcester College of Technology). This leaves 52% of purchases coming from outside the sub-region from 18 HEIs:

- | | | |
|------------|------------|------------------|
| Aberyswyth | Durham | Reading |
| Aston | Goldsmiths | Sheffield |
| Bath | Glamorgan | Sheffield Hallam |
| Birmingham | Imperial | Teesside |
| Cambridge | London | Wales |
| Coventry | Manchester | Warwick |

26. How would you select an institution to work with?

Employers ranked (1 = highest place, 4 = lowest place) their key criteria as follows:

Criteria	Mentions	Distribution	Ave. score
Relevance of the course	33	1-4	1.48
Reputation	16	1-3	1.69
Mean Average	112	1-4	1.79
Quality (to include customer service, relationship, facilities)	32	1-4	1.84
Location (Hereford or on site preferred)	13	1-3	1.85
Flexibility (to include course structure, delivery and timing)	8	1-4	2.25
Cost	10	1-4	2.30

Table 7: Key Needs Criteria

Questionnaire for employees

Description of respondents.

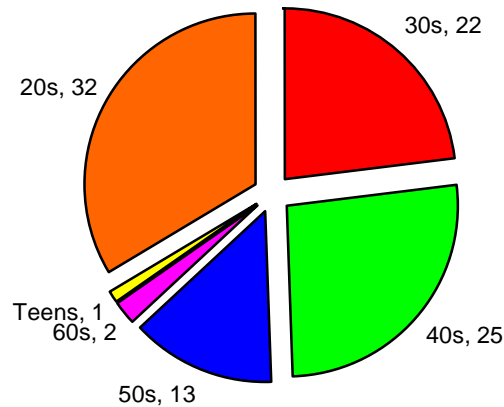


Chart 12: Age of Employee Respondents

The sample of comparatively young respondents gave the views of employees whom, it could be assumed, had ongoing career development goals. The majority (62%) of respondents were female which helps to give a picture of how non-linear career progression.

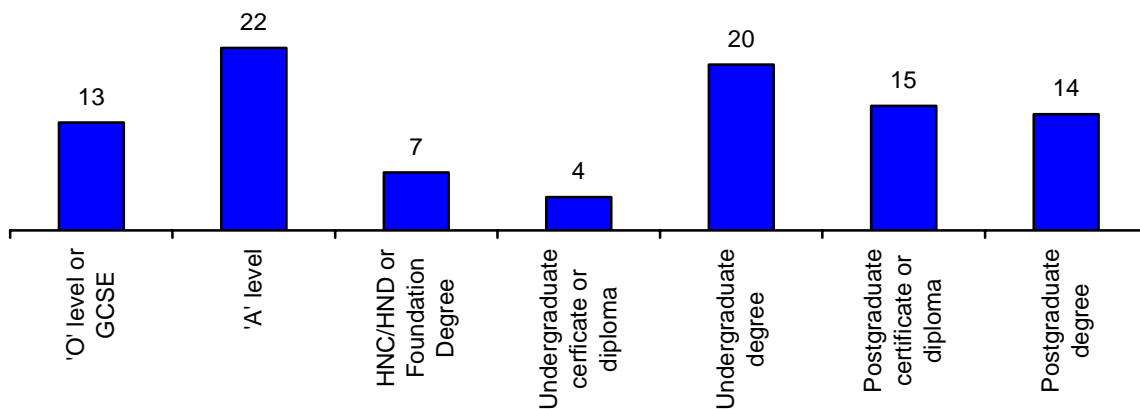


Chart 13: Employees' Highest Academic Achievement to Date

This demonstrates a relatively highly level of education already. However, employees and employers both declare an interest in further training. We can see that there may be scope for the O/A level, HNC/D, and UG Cert./Dip. achievers could want to progress towards an undergraduate degree (48% of the sample) and those who have already achieved undergraduate degree or PG Cert./Dip. Level (37% of the sample) could want to progress onto a full Post Graduate degree.

1. How would you classify your current role and where do you see yourself in the future?

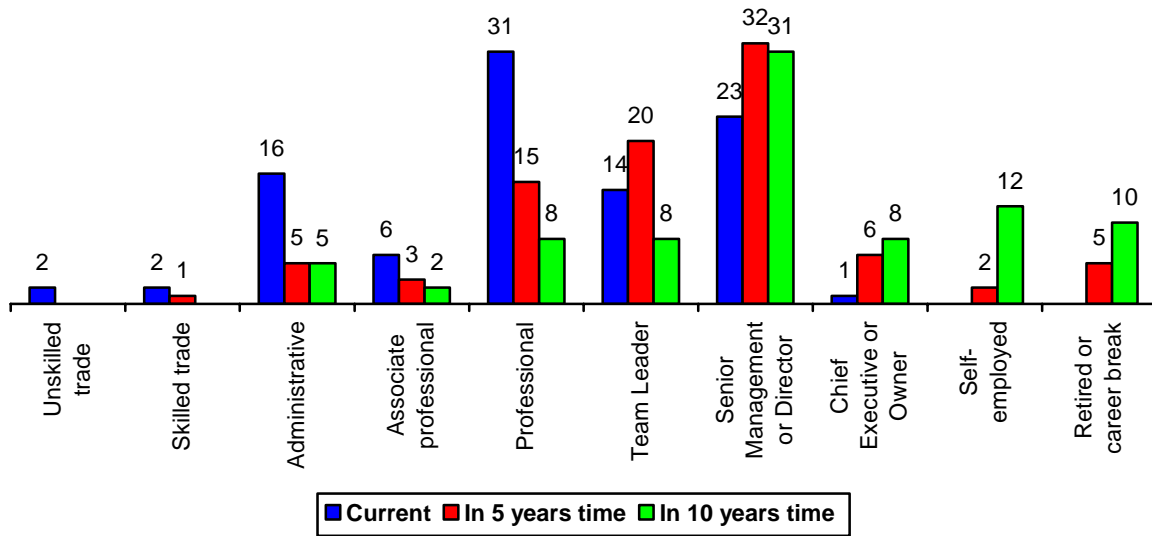


Chart 14: Employees' Ambitions

Our audience is largely white collar administrative, management and professional occupations. Chart 14 shows a distinctive shift to the right (i.e. higher up the career development scale) which may require enhanced higher level qualifications.

2. How important is career development to you?

86% of respondents claimed that career development is important to them.

3. What would be your main motivator for undertaking a Higher Education course?

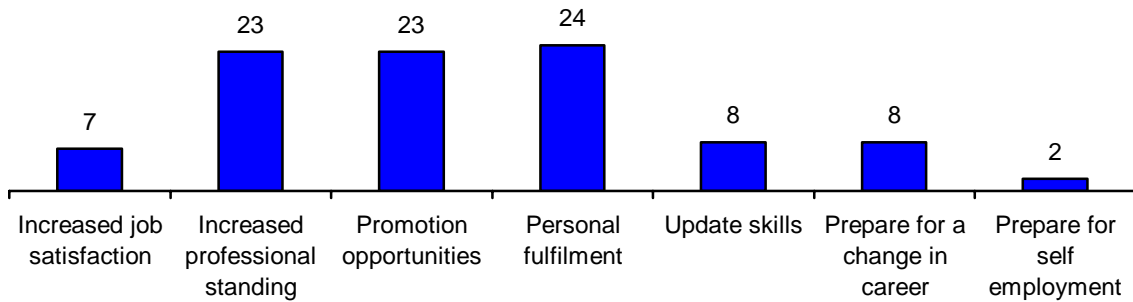


Chart 15: Employees' Motivations

We should not assume that promotion is the sole motivator for undertaking a professional development programme. Only 35% of respondents state this as their main aim whilst 65% consider personal fulfilment and job satisfaction to be the superior motivator.

4. When in the year would you prefer to study for a qualification?

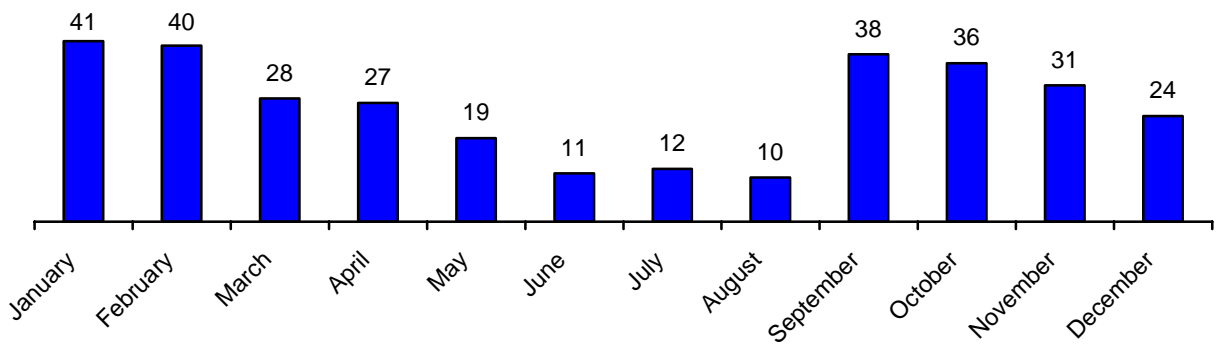


Chart 16: Preferred Study Time in the Year

Standard term-time (October to May) learning is preferred by 78% of prospective learners with the potential for summer (June to September) programmes appealing to the remaining 22%. This period could be used to provide HE taster programmes based on a summer school format to encourage enrolment for full programmes at the start of term from the end of September.

5. When during the week would you prefer to study for a qualification?

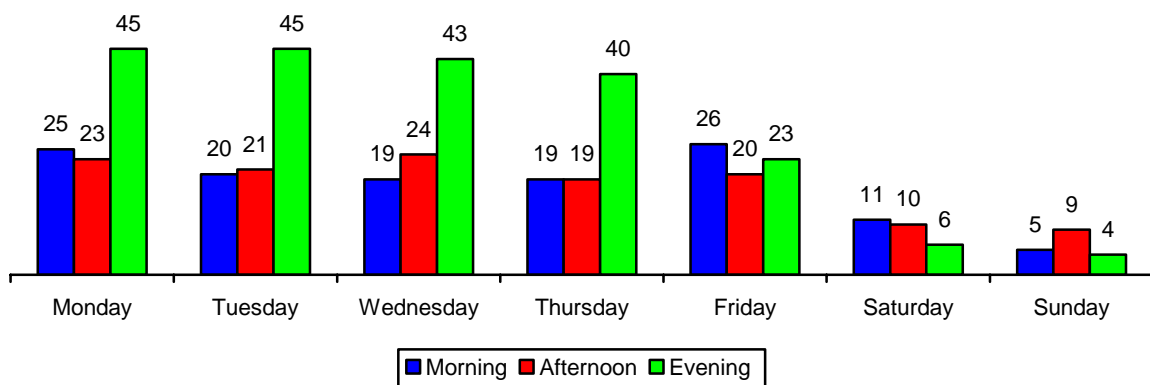


Chart 17: Preferred Time of Study in the Week

Weekday evening remains the most popular window for part-time learners with 43% preferring that route. As with question 4 there is a segment of our audience who would prefer weekend courses. However this much smaller group (10%) is unlikely to make such a provision cost effective.

6. How would you prefer to study for a qualification?

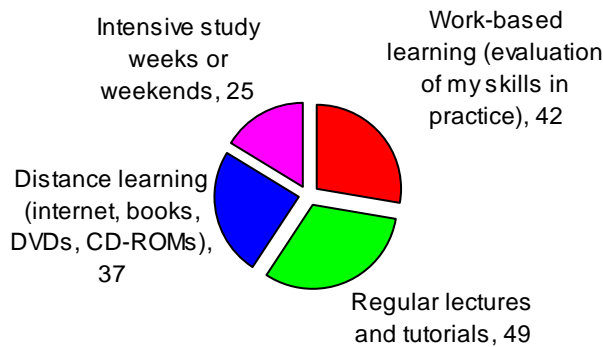


Chart 18: Preferred Learning Methods

Learners prefer a blended approach to learning based around regular lectures and tutorials.

7. How long would you expect to study for your preferred qualification?

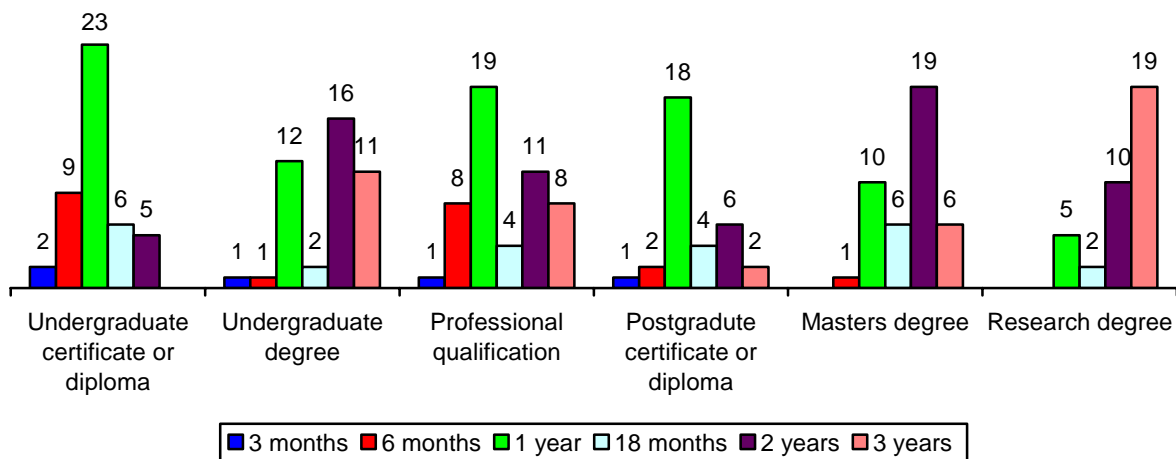


Chart 19: Anticipated Duration of Study

There is wide variation in the duration of programmes amongst learners. For example, those of our sample who expressed an interest in a Masters degree anticipated study being from as little as 6 months to as long as 3 years. This question did not allow for learners to express their preference for intensity of study. Taking this example in microcosm it can be assumed that 40% of the market would require a more intensive executive education programme of 6-18 months whereas 60% prefer a part-time approach. We would do well to heed the needs of these differing segments.

8. *Where would you expect the majority of the learning contact to take place?*

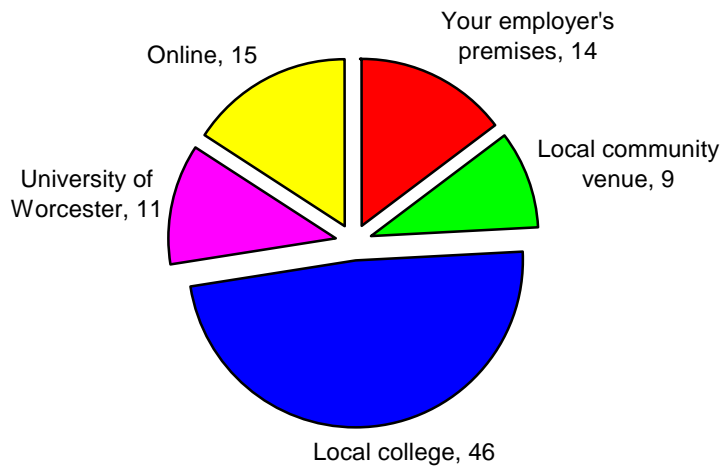


Chart 20: Preferred Learning Venue

In line with the findings to question 6 we see that a blended approach is preferred based on clear affiliation to a Further/Higher education institution. Given the lack of a pure HE provider in Herefordshire it is reasonable that the FE colleges are preferred.

9. *Would you want your course to lead to a recognised academic award?*

All employees want their studies to lead to a recognised award.

10. *What are the biggest barriers to your personal and professional development?*

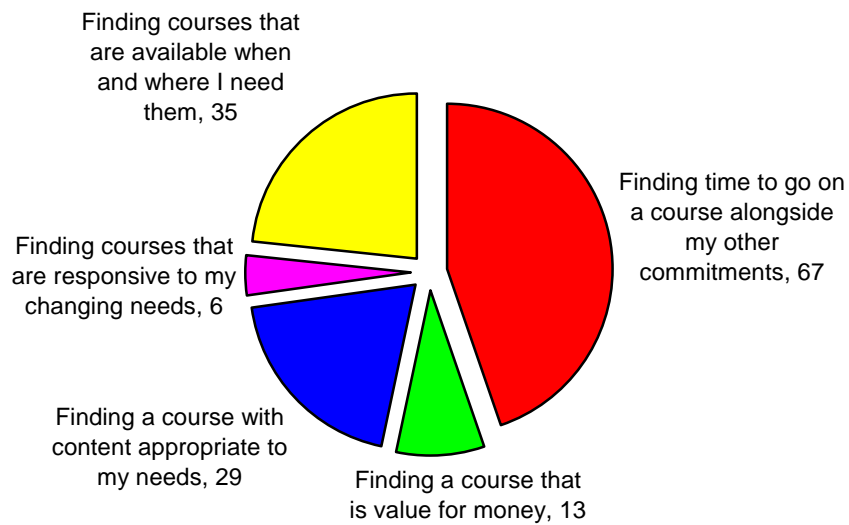


Chart 21: Barriers to Development

Employees state timing and flexibility as being key to their success as part-time learners. This is in direct contradiction to the employers' response (see Table 6). When promoting our programmes we should be mindful of this difference and communication messages appropriately.

11. *What next after your course?*

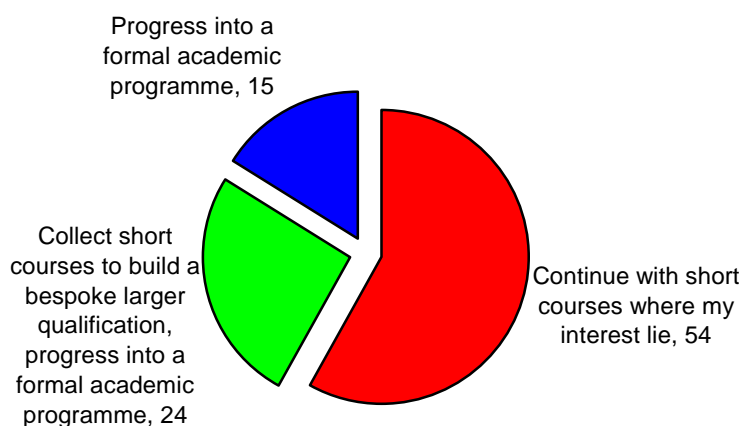


Chart 22: Progression Routes

Learners value the ability to accumulate short courses that lie with their spheres of interest. This will require flexible courses design and accreditation to retain learners reluctant to subscribe to traditional awards programmes.

12. *If you want to build up towards a formal academic qualification, how far would you want to go?*

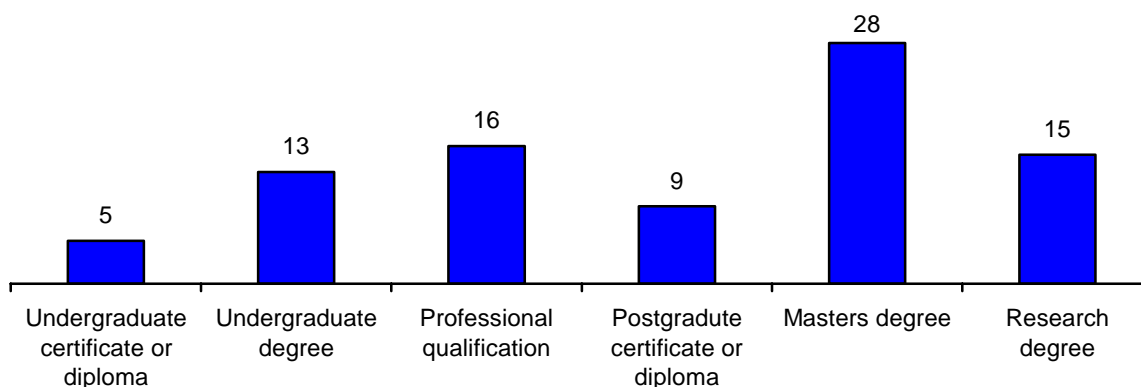


Chart 23: Academic Ambitions

To build upon the description of respondents on page 21, chart 23 shows that the demand for postgraduate qualifications is much bigger than anticipated with 79% of respondents wishing to ultimately progress to this level, a proportion of which may go via an undergraduate degree.

13. If your desired course is intended to enhance your career, what is the anticipated annual salary increase you would expect to receive?

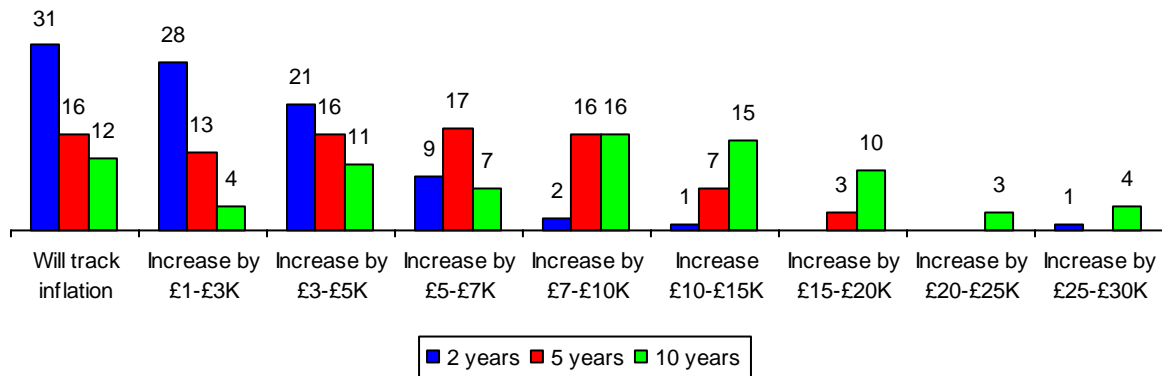


Chart 24: Anticipated Annual Salary Benefits

When these figures are analysed we see the following average annual salary benefit that students anticipate will arise as a result of their qualification:

- £2,710 after 2 years
- £5,432 after 5 years
- £9,476 after 10 years

This information helps us to price our courses accordingly.

14. How would you best like to enquire, book and pay for the course?

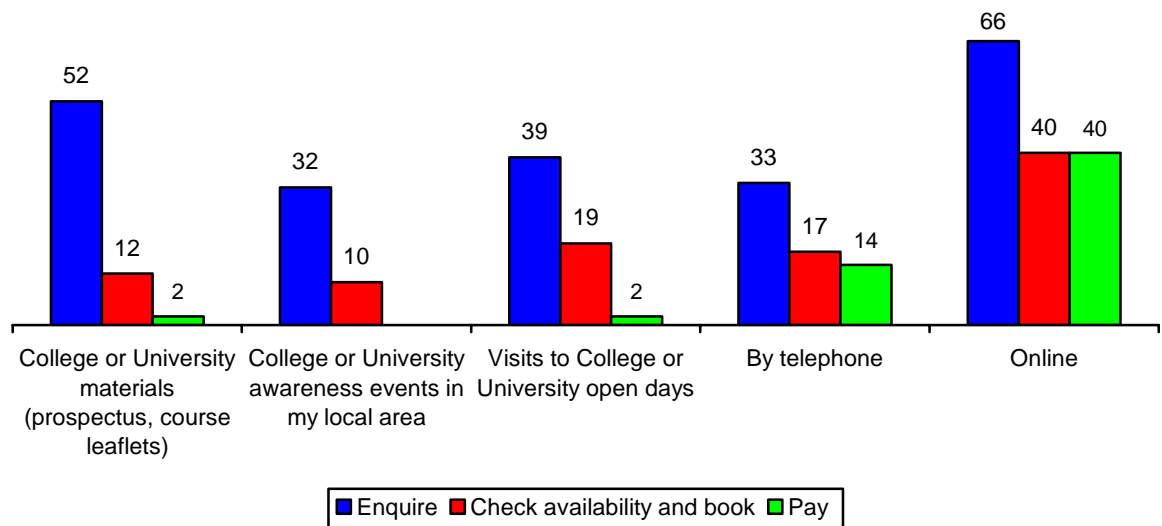


Chart 25: Preferred Purchasing Processes

Face to face contact with HE staff is preferred throughout the buying process, but especially so at the enquiry stage. Other automated methods provide valuable support at the booking and payment stage.

15. Who will pay for the course?

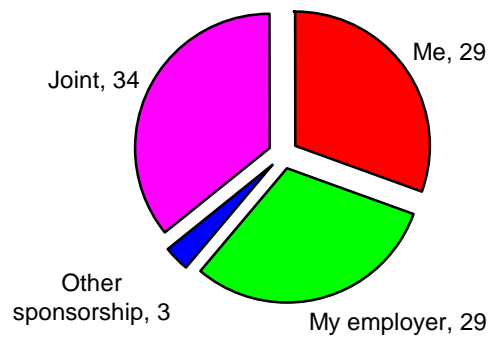


Chart 26: Defining the Customer and Consumer Relationship

We must be careful to ensure that our promotional messages meet the differing, but not irreconcilable, needs of employers and employees as they both have a crucial role to play in the purchasing decision.

16. Which of the following courses might interest you (<3 responses ignored)?

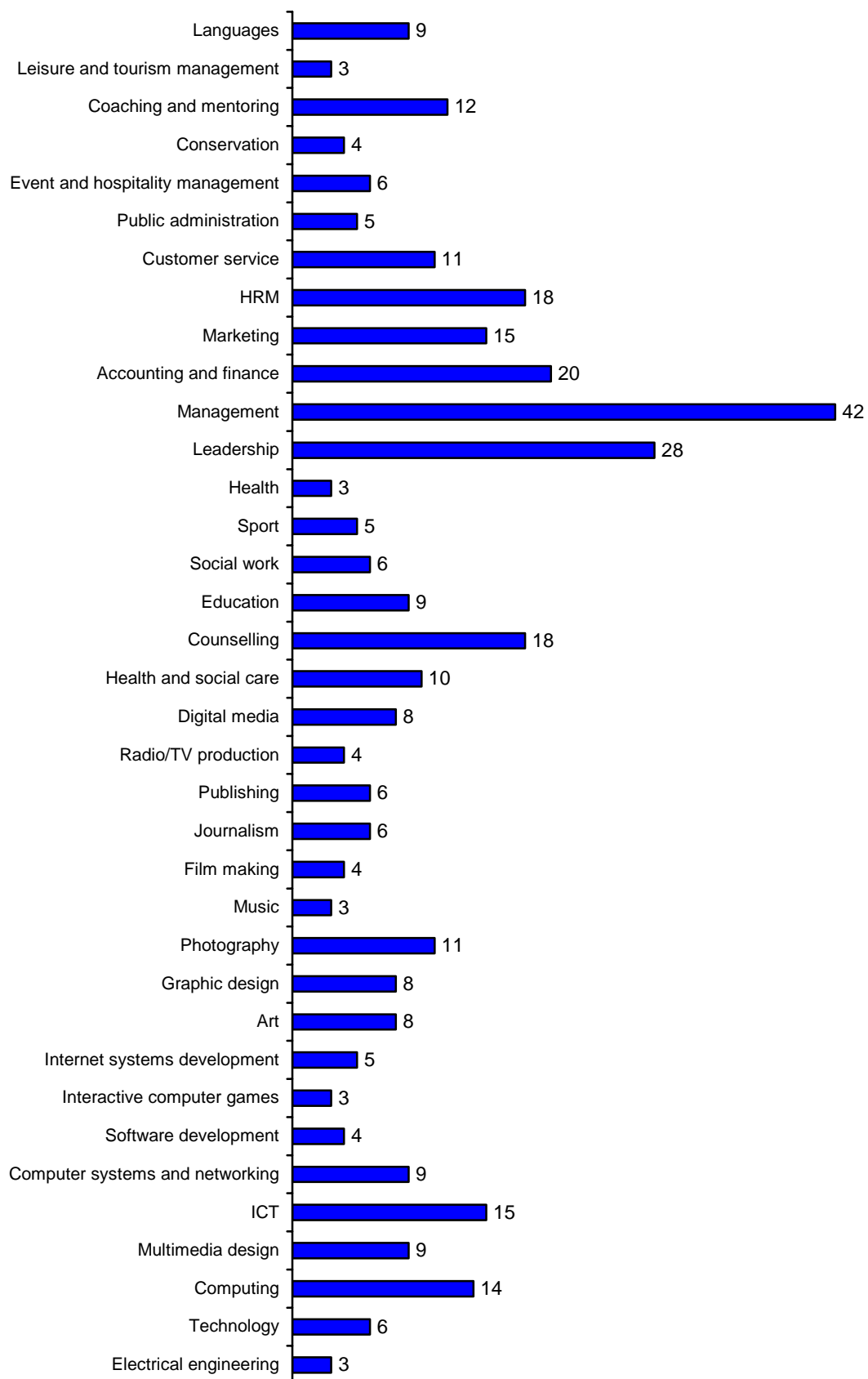


Chart 27: Course Subject Interest

17. Which other University or College services would you use?

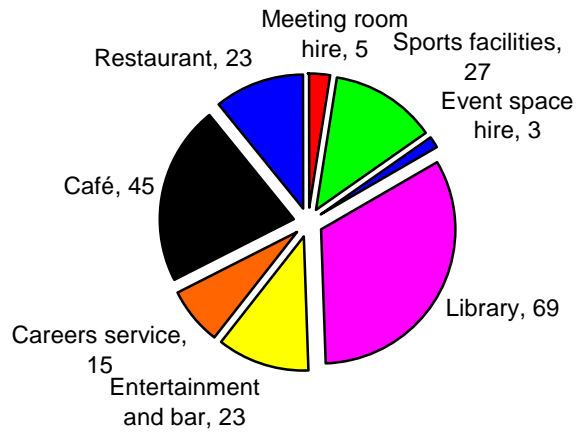


Chart 28: Other University or College Services

Whilst library facilities emerge as desirable for 33% of our sample, 43% require adequate catering facilities. Design of any new facility must make consideration for the provision of learning and communal/relaxation spaces.

18. How do you know about the University and Colleges in Herefordshire?

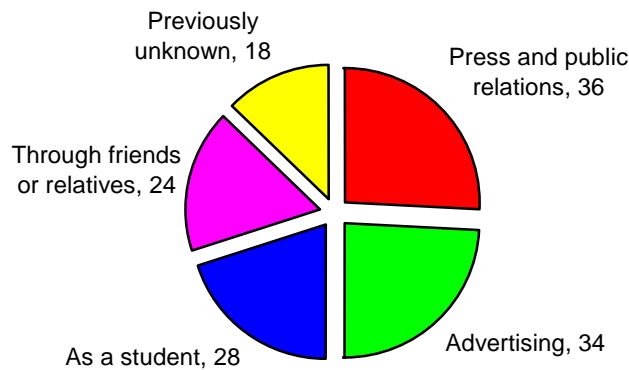


Chart 29: Employees' Previous Knowledge of HE in Herefordshire

We should make good use of the multiple communication channels that help inform and persuade our potential customers.

19. *Would the University and Colleges in Herefordshire be your first choice for career development programmes?*

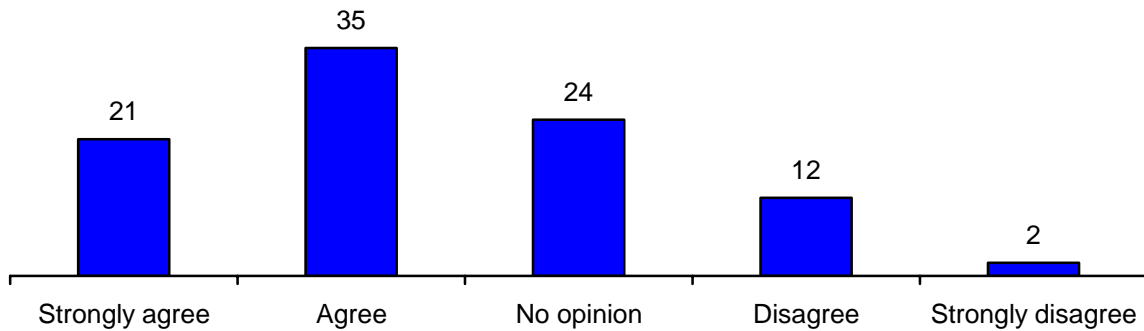


Chart 30: Employees' First Choice for CPD Programmes

Whilst 60% are positively predisposed towards us, the remainder still need to be convinced.

20. *What Colleges/Universities have you previously been involved with and how likely are you to use them again?*

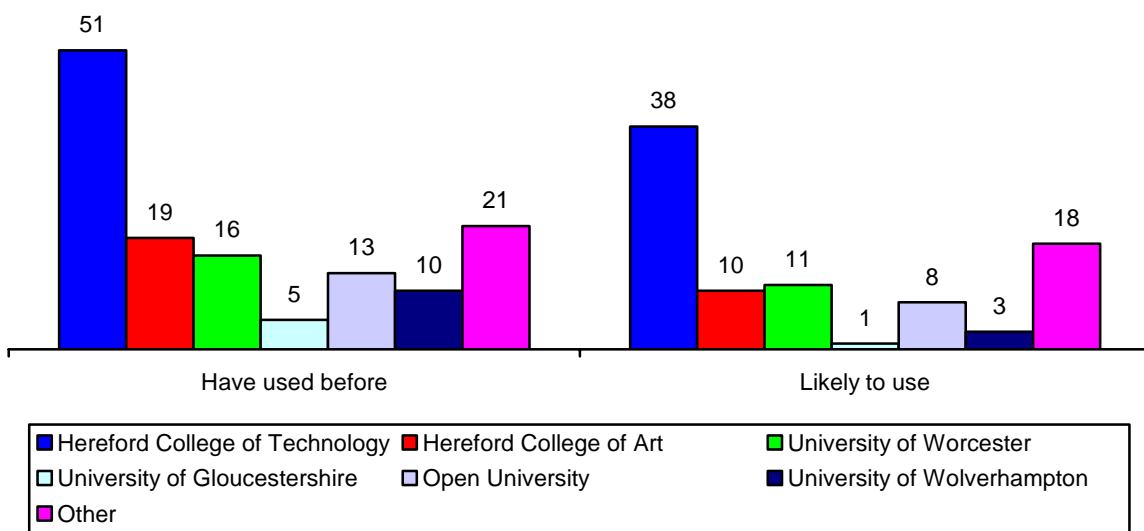


Chart 31: Employee Relationships with FEI/HEIs

52% of all FE/HE usage takes place in Herefordshire proper (HCT and HCA) with an additional 12% of purchases made within the Herefordshire and Worcestershire sub-region (University of Worcester). This leaves 36% of purchases coming from outside the sub-region from 17 HEIs:

- | | | |
|-----------------|--------------|-----------------|
| Aberyswyth | Glamorgan | Newman |
| Birmingham | Harper Adams | Salford |
| Birmingham City | Keele | Staffordshire |
| Bristol | Lampeter | Wales |
| Chester | Leicester | West of England |
| De Montfort | Loughborough | |

21. *What other short course providers would you use?*

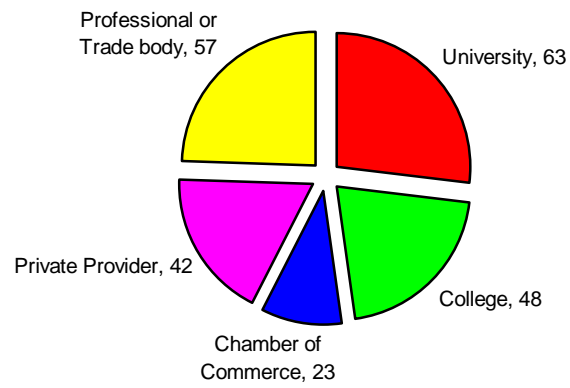


Chart 32: Other Short Course Providers

The LLN has plenty of scope for collaboration with Professional or Trade bodies and the Chamber of Commerce in the provision of HE in Herefordshire.

5. MARKET SIZING

On average our sample of employers said that they would support 18.1% of their workforce to participate in HE to some level. Of the 85 employee respondents all said that they would be interested in a Higher qualification. This data allows us to make the following assessment of market size based on anticipated levels of participation within each sector as a percentage of the total employment within the sector. Based on the Stratified Sample Structure in Table 1 it is possible to give the following demand volume estimates:

Sector		
Public Sector	Public administration and defence	247
	Education	723
	Health and social work	2,350
Private Sector	Micro (1-10)	4,715
	Small (11-49)	1,125
	Medium - (50-199)	896
	Large (200+)	1,773
Voluntary and Community	Voluntary and Community	481
		12,310

Table 8: Potential Demand Levels by Sector

It is important to remember that this forecast applies to modular programmes (not necessarily award bearing Undergraduate or Post Graduate programmes in the first instance) mostly driven by an overall a growth in demand and a migration from non-accredited in-house programmes. For planning purposes it could be assumed that this is the current maximum market size based on each learner taking one module per academic year.

From this research we now have a clear picture of where our direct FEI/HEI competition exists and the likely levels of displacement by an improved HE provision in Herefordshire.

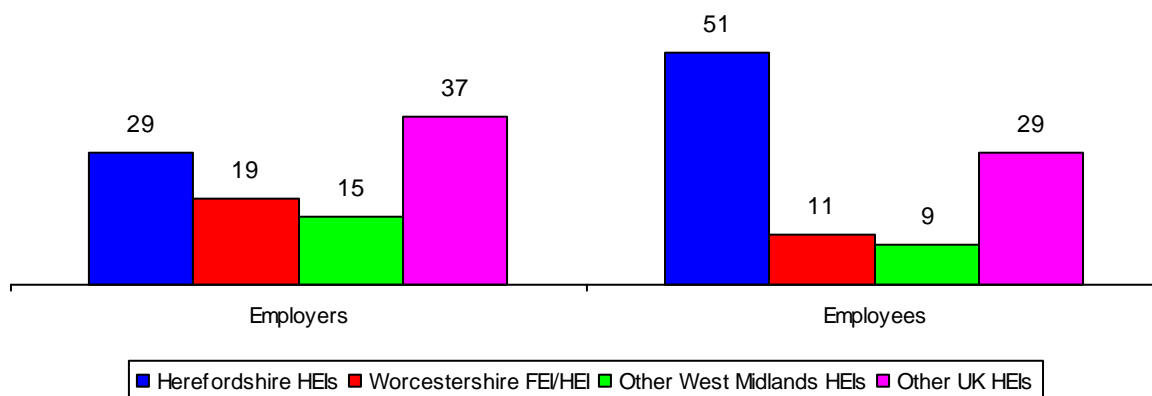


Chart 33: FEI/HEI Percentage Market Share

Current levels of HE activity are estimated to be at no more than 20% of the total potential identified in Table 7. Whilst it is difficult to imagine that all HE provision will come back into Herefordshire and away from specialist institutions such as Harper Adams, Warwick, Cambridge, Imperial and Bath (combined representing 24% of non-H&W provision) then the H&W LLN could reasonably contest for learners currently attending generic institutions such as Birmingham City, Open, Birmingham, Glamorgan, Wolverhampton and Bristol (combined representing 76% of non-H&W provision).

6. CONCLUSIONS AND RECOMMENDATIONS

Our target audience is large and diverse in nature and has clear, pressing and common needs (mostly in management disciplines). Employers and employees think alike in terms of the ambitions of their organisations and the role that personal and professional development plays in achieving that goal. Our audience is open to new course ideas and are warm to approaches from the HE providers in Herefordshire, having had mostly positive experiences during previous engagements.

There is a distinct split in terms of programmes required by employers. 22% of the market falls into non-accredited short courses run by private providers and this is not an area where HEIs should be focusing their efforts (employers see this as the core domain of the privateer). The area of focus for HEIs should be the programmes currently being provided in house by employers which do not lead to accredited qualifications. This represents around 50% of the total market and employers are mostly keen to see these programmes provided by HE to a higher and more consistent standard, working with a wider range of businesses (to encourage peer learning), with possible cost sharing benefits.

In order to access this market flexible courses should be delivered locally to Hereford and should be shaped to address employer and employee needs (but not transformed into training courses), delivered by professional and credible staff, and supported by a customer focussed interface. Key to reaching the full potential that this market has to offer is to dramatically improve our communication with employers and employees alike to make clear the benefits of HE programmes on offer. This could be achieved by the production of a brief publication which clearly explains to the employer what graduate and post graduate qualifications are and what benefits they will bring to the organisation. A 'personal shopper roadshow' approach could benefit all employers as they seek to navigate skills and qualifications they know that they need but do not understand.

Key to success is building relationships with employers in particular (employees are far more loyal for Higher Education in Herefordshire). The dialogue has commenced with this research and should progress into a closer co-ordination of the various education brokers across the County and the sub-region. Simply parachuting in and 'assessing' an employer's organisation (an accusation often levelled at Train to Gain brokers) often creates the impression that employers are not involved in the development of their staff but are simply being sold a qualification. Brokers should maintain a regular contact with an employer, often suggesting wide-ranging programmes to keep business skills updated at all management and professional levels. Adequate equipping, training and communication with brokers is key to developing the substantial level of latent demand that has been identified.

Many employers expressed an interest in Continuing Professional Development to maintain the skills levels of themselves and their employees after initial qualification. These programmes may not necessarily be award bearing but are valued by customers seeking every advantage in their business by benefiting from research and practice based skills developed in FEI/HEIs and delivered in an accessible and convenient manner by professionals. There is potential for a CPD framework for SMEs at Masters level to meet this substantial and ongoing need.

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Higher Education in Herefordshire Employer Interview

This research aims to identify the need, in terms of Higher Education, of public and micro employers in Herefordshire, the needs of their employees, and any particular needs of part time learners in Herefordshire. The higher education referred to will be qualifications or parts of qualifications at Level 4 and above which will address particular skills gaps in the workforce. These will be met by a variety of providers including universities, colleges, private training providers, and public sector organisations with training departments.

This research will be undertaken by: Andrew Corcoran Knowledge Transfer Manager University of Worcester T: 01905 855430 E: a.corcoran@worc.ac.uk	This research will be managed by: Debbie Lambert H&W Lifelong Learning Network Manager University of Worcester T: 01905 542059 E: d.lambert@worc.ac.uk
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Interviews will be recorded so that all input is accurately captured. All recordings will be erased once interviews are written up.

Findings from this research will inform the future development of Higher Education provision in Herefordshire.

As a follow up we would ask your employees to complete the online questionnaire at http://www.surveymonkey.com/s.aspx?sm=h3WacnKA3wEmMNBHlbDmew_3d_3d. All responses will be entered into a draw for a £10 Amazon gift voucher.

Date: _____

Organisation: _____

Activity: _____

Employees: _____

Name: _____

Position: _____

1. What are your key business challenges?

The next 12 months	The next 3 years
--------------------	------------------

2. What skills/experience/qualifications need to be developed in your existing workforce to cope with these challenges?

<i>Now</i>	<i>In the future</i>
Volunteer	Volunteer
Unskilled trade	Unskilled trade
Skilled trade	Skilled trade
Administrative, clerical and secretarial	Administrative, clerical and secretarial
Associate professional and technical	Associate professional and technical
Professional	Professional
Team Leader	Team Leader
Senior Management/Director	Senior Management/Director
Chief Executive/Owner	Chief Executive/Owner

THINK ACROSS DISCIPLINES!

3. How do you currently address these skills gaps?

4. To what extent do you invest in developing your employees?

5. What is the key return on this investment?

6. How would you like your employees to gain these skills in the future?

7. To what degree would you consider collaborating with other employers to commission training and higher education?

8. What are the key skills/experience/qualifications you are seeking in new employees (possibly graduates)?

9. How well does HE meet your needs for higher level skills development?

very well	good	acceptably	poorly	very poorly
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10. How could this be improved?

11. What level of qualification would you like your employees to work towards?
Undergraduate certificate/diploma
Undergraduate degree (e.g. BA, BSc)
Professional body qualification (e.g. CIMA, CIPS, CIM, CIPD, CMI)
Postgraduate certificate/diploma
Masters degree (e.g. MA, MSc, MBA)
Research degree (e.g. MPhil, PhD)

12. To what extent would you prefer employees to study bespoke modular programmes rather than for a generic qualification?

13. Over what period of time?

14. How would you like this to be delivered?

- Location
- Time
- Day
- Distance
- Study leave
- Evening
- E-learning
- On-site

15. How would you prefer learning to be evaluated?

- Test
- Assignment
- Portfolio of evidence
- Case study
- Individual work
- Group work
- Work based learning
- Accreditation of prior experiential learning

16. Would you like UW to accredit training delivered in house and/or supplied by private providers?

strongly agree agree no opinion disagree strongly disagree

17. Given the right mix of delivery, accessibility, and suitability of courses how many of your employees would engage in HE and to what extent?

18. What support do you believe is crucial for part-time learners to succeed in HE?

19. Would you actively encourage your employees to work towards an HE qualification?

strongly agree agree no opinion disagree strongly disagree

20. Would you be prepared to engage with HE on a regular basis to shape their course offering?

strongly agree agree no opinion disagree strongly disagree

21. Which other University or College services would you use?

Meeting room hire
Events space hire
Sports facilities
Library
Careers service
Entertainment/bar
Café/Restaurant

22. How do you know about the Universities and Colleges in Herefordshire?

Press/public relations
Advertising
As a student
Through friends relatives
Previously unknown

23. Would the Universities and Colleges in Herefordshire be your first choice for career development programmes?

strongly agree agree no opinion disagree strongly disagree

24. What short course providers would you use?

University
College
Chamber of Commerce
Private provider
Professional/trade body

25. What Colleges/Universities have you previously been involved with and how likely are you to use them again?

Hereford College of Technology
Hereford College of Art
University of Worcester
University of Gloucestershire
Open University
Other, please specify

26. How would you select an institution to work with?

Reputation
Existing relationship
Proximity
Other, please specify

APPENDIX II – EMPLOYEE QUESTIONNAIRE

Respondent description (organisation, activity, position, age, profession, highest academic achievement) and contact details with a request for permission to contact them.

1. How would you classify your current role/where do you see yourself in 5 years time/ where do you see yourself in 5 years time? (manager/senior official; professional; associate professional and technical; administrative, clerical and secretarial; skilled trade; operative; elementary)
2. How important is career development to you? (very important, important, not important, irrelevant)
3. What would be your main motivator for undertaking a short course? (increased job satisfaction, increased professional standing, promotion opportunities, personal fulfilment, update skills)
4. When in the year would you prefer to study for a qualification? (by month)
5. When during the week would you prefer to study for a qualification? (day and time)
6. How would you prefer to study for a qualification?
7. How long would you expect to study for a qualification part-time? (3 months, 6 months, 1 year, 2 years, 3 years)
8. Where would you expect the majority of the learning contact to take place (at UW, at your employer's premises, online, a combination of all three)
9. Would you want your course to lead to a recognised academic award? (absolutely, possibly, unlikely, not at all)
10. What are the biggest barriers to your personal and professional development?

11. What next after your course? (continue with short courses where my interest lies, collect short courses to build a bespoke larger qualification, progress into a formal academic programme)
12. If you want to build up towards a formal academic qualification, how far would you want to go? (HNC, HND, Foundation Degree, Certificate in HE, Diploma in HE, Undergraduate Degree, Postgraduate taught, Postgraduate research)
13. If your desired course is intended to enhance your career, what is the anticipated salary increase you would expect to receive over the next 2 years/5 years/10 years? (Tracking inflation, £1-3K, £3-5K, £5-7K, £7-10K, £10-15K, £15-£20K, £20-£25K, £25-£30K)
14. How would you best like to enquire, book and pay for the course? (all online, by 'phone, face-to-face)
15. Who will pay for the course? (you, your employer, other sponsorship, joint)
16. Please indicate which of the following courses might interest you (construction, electrical engineering, mechanical engineering, civil engineering, technology, computing, multimedia design, ICT, networking, software development, interactive computer games, internet systems development, information systems, art, graphic design, photography, performance, music, film making, journalism, publishing, radio/TV production, digital media, health and social care, counselling, nursing, education, fitness and nutrition, social work, physiotherapy, rehabilitation, learning support, sport, health, leadership, management, accounting and finance, marketing, HRM, purchasing and supply, customer service, public administration, innovation, event and hospitality management, enterprise, horticulture, environmental sustainability, conservation, coaching and mentoring, public health, leisure and tourism management)
17. Which other University or College services would you use? (facilities hire, sports facilities, library, entertainment, café, restaurant)
18. How do you know about the University and Colleges in Herefordshire? (press/PR, advertising, as a student, through friends relatives, previously unknown)

19. Would the University and Colleges in Herefordshire be your first choice for career development programmes (strongly agree, agree, disagree, strongly disagree)

20. What universities have you previously been involved with and how likely are you to use them again? (Gloucestershire, Harper Adams, Keele, Newman, Open, Wolverhampton, Worcester, Hereford College of Technology, Hereford College of Art)

21. What other short course providers would you use? (University, Chamber of Commerce, College, private provider, professional body, trade body)

APPENDIX III – INTRODUCTORY EMAIL

Subject: Higher Education in Herefordshire - Need and Demand Research

Dear _____,

Please forgive this unsolicited email. I write to ask you to participate in a study by the University of Worcester into the need and demand for Higher Education in Herefordshire.

This research is taking place over May to August 2008 and targets over 50 companies and 220 of their employees across Herefordshire who are engaged in a wide range of business activities within the private, public and community sectors. Operating in two stages Phase 1 will take the form of an interview with business owners and senior managers to identify their business' current and future skills needs. Please see the attached interview guide. This interview should take no longer than one hour of your time. Phase 2 is aimed at identifying the needs and barriers to participation in Higher Education experienced by your employees. This data will be collected by an online survey tool (http://www.surveymonkey.com/s.aspx?sm=h3WacnKA3wEmMNBHlbDmew_3d_3d) and should take no longer than 20 minutes to complete. As a token of our gratitude we are offering a £10 Amazon gift voucher to all who complete the interview or questionnaire process.

Findings from this work will go forward to inform Government investment in Higher Education facilities to serve Herefordshire and it is anticipated that the process will lead directly to the following potential benefits to your organisation:

- increased skills and capability of your workforce (to support business growth and succession planning)
- identify other University-led support schemes that might benefit your business (e.g. Knowledge Transfer Partnerships)
- shape the University offering to meet your needs, delivered in a manner that supports rather than disrupts your business activities
- invitation to a dissemination event later in the year to show our findings and to describe how we will be acting on your recommendations

I do hope that you will agree to participate in this study. Please contact me if you have any questions.

Best wishes,

Andrew Corcoran

Head of Knowledge Transfer and Business Partnerships

University of Worcester

e: a.corcoran@worc.ac.uk t: 01905 855430

APPENDIX IV – MEETING CONFIRMATION EMAIL

Higher Education in Herefordshire - Need and Demand Research - meeting confirmation

Dear _____,

Thank you for taking my call yesterday and agreeing to support this research which is taking place over May to July 2008 and targets over 50 companies and 220 of their employees across Herefordshire who are engaged in a wide range of business activities within the private, public and community sectors. Operating in two stages Phase 1 will take the form of an interview with business owners and senior managers to identify their business' current and future skills needs. Please see the attached interview guide. This interview should take no longer than one hour of your time. Phase 2 is aimed at identifying the needs and barriers to participation in Higher Education experienced by your employees. This data will be collected by an online survey tool (http://www.surveymonkey.com/s.aspx?sm=h3WacnKA3wEmMNBHlbDmew_3d_3d) and should take no longer than 20 minutes to complete. As a token of our gratitude we are offering a £10 Amazon gift voucher to all who complete the interview or questionnaire process.

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- identify other University-led support schemes that might benefit your business (e.g. Knowledge Transfer Partnerships)
- shape the University offering to meet your needs, delivered in a manner that supports rather than disrupts your business activities
- invitation to a dissemination event later in the year to show our findings and to describe how we will be acting on your recommendations

I look forward to meeting you at your offices at 9.30 on 2nd June.

Best wishes,

Andrew Corcoran

Head of Knowledge Transfer and Business Partnerships

University of Worcester

e: a.corcoran@worc.ac.uk t: 01905 855430

APPENDIX V – EMPLOYEE QUESTIONNAIRE EMAIL

Higher Education for Herefordshire Research - employee questionnaire link

Dear _____,

Many thanks for meeting with me today.

As promised please find attached the link to our online survey tool that I hope you will circulate within your organisation

(http://www.surveymonkey.com/s.aspx?sm=h3WacnKA3wEmMNBHibDmew_3d_3d). Each complete response will be put into a draw for up to 300 £10 Amazon gift vouchers.

Many thanks again for your support.

Best wishes,

Andrew Corcoran

Head of Knowledge Transfer and Business Partnerships

University of Worcester

e: a.corcoran@worc.ac.uk t: 01905 855430

APPENDIX VI – EMPLOYERS INTERVIEWED

Company name	Sector	Segment	Employees	Post Town
7Y SERVICES LTD	Private - Small	Business services	35	Leominster
ARBOUR TECH LIMITED	Private - Micro	Manufacturing and engineering	5	Leominster
BELMONT LODGE AND GOLF	Private - Small	Hotels and catering	30	Hereford
BROADFIELD COURT VINEYARD	Private - Micro	Hotels and catering	8	Leominster
CADBURY TREBOR BASSETT	Private - Medium	Manufacturing and engineering	101	Leominster
CENTRAL ROOFING (SOUTH WALES) LIMITED	Private - Medium	Construction	50	Hereford
CONCERN UNIVERSAL	Voluntary and Community	Health and social work	14	Hereford
COURTYARD TRUST	Voluntary and Community	Creative industries	65	Hereford
DAIRY HOUSE LIMITED	Private - Small	Land-based industries	38	Hereford
DUNFIELD HOUSE LIMITED	Voluntary and Community	Leisure and tourism	14	Kington
ENGLISH HERITAGE	Voluntary and Community	Leisure and tourism	20	Ross-On-Wye
FROYA LIMITED	Private - Micro	Creative industries	9	Hereford
GMP SOFTWARE LIMITED	Private - Small	ICT and telecommunications	11	Ross-On-Wye
HAY FESTIVAL OF LITERATURE AND THE ARTS LIMITED	Voluntary and Community	Leisure and tourism	14	Hereford
HAYGROVE LIMITED	Private - Medium	Land-based industries	87	Ledbury
HEREFORD AND WORCESTER FIRE AND RESCUE SERVICE	Public administration and defence	Public administration	70	Hereford
HEREFORD CATHEDRAL	Voluntary and Community	Leisure and tourism	52	Hereford
HEREFORD COLLEGE OF ARTS	Public - Education	Education	176	Hereford
HEREFORD HOSPITALS NHS TRUST	Public - Health and social work	Health and social work	1700	Hereford
HEREFORDSHIRE COLLEGE OF TECHNOLOGY	Public - Education	Education	580	Hereford
HEREFORDSHIRE COUNCIL	Public administration and defence	Public administration	3000	Hereford
HEREFORDSHIRE HEADWAY	Voluntary and Community	Health and social work	18	Hereford

Company name	Sector	Segment	Employees	Post Town
HEREFORDSHIRE HOUSING LIMITED	Voluntary and Community	Health and social work	230	Hereford
HEREFORDSHIRE PRIMARY CARE TRUST	Public - Health and social work	Health and social work	1400	Hereford
HEREFORDSHIRE VOLUNTARY ACTION	Voluntary and Community	Health and social work	20	Hereford
HOLDEN ALUMINIUM TECHNOLOGIES LIMITED	Private - Small	Manufacturing and engineering	48	Bromyard
JUMPSTART KIDZ LTD	Voluntary and Community	Education	10	Hereford
KC3 LIMITED	Private - Small	ICT and telecommunications	12	Kington
KLEENAIR SYSTEMS INTERNATIONAL PLC	Private - Micro	Manufacturing and engineering	7	Ross-On-Wye
LIGHT & LAND LIMITED	Private - Micro	Leisure and tourism	4	Hereford
LOWTHER A.J. & SON LTD	Private - Small	Construction	52	Ross-On-Wye
LUCTON PIERREPONT SCHOOL EDUCATIONAL TRUST	Private - Small	Education	80	Leominster
M AND M DIRECT LIMITED	Private - Large	Wholesale and retail	450	Leominster
MEADOW CHEESE COMPANY LIMITED	Private - Medium	Manufacturing and engineering	100	Ledbury
MICRON SPRAYERS LIMITED	Private - Small	Manufacturing and engineering	38	Bromyard
OAKHOUSE NURSERY SCHOOL	Private - Small	Education	26	Ross-On-Wye
PGL GROUP LIMITED	Private - Large	Leisure and tourism	250	Ross-On-Wye
PLAYHOUSE COMPANY	Private - Micro	Manufacturing and engineering	5	Leominster
PRACTICE LIMITED	Private - Small	ICT and telecommunications	40	Hereford
ROYAL NATIONAL COLLEGE FOR THE BLIND	Public - Education	Education	240	Hereford
ROYSTON DAVIES LIMITED	Private - Micro	Construction	7	Leominster
RURAL MEDIA COMPANY	Voluntary and Community	Creative industries	16	Hereford
SALTERS HILL CHARITY LIMITED	Voluntary and Community	Health and social work	50	Ledbury
SEQUANI LIMITED	Private - Medium	Manufacturing and engineering	175	Ledbury
SHIRES EQUESTRIAN	Private - Medium	Wholesale and retail	65	Leominster

Company name	Sector	Segment	Employees	Post Town
SKYMARK PACKAGING INTERNATIONAL LIMITED	Private - Medium	Manufacturing and engineering	115	Leominster
TASTE FOR ADVENTURE	Voluntary and Community	Leisure and tourism	9	Hereford
THORNE WIDGERY LTD	Private - Small	Business services	45	Hereford
TYRRELLS POTATO CHIPS LIMITED	Private - Medium	Manufacturing and engineering	100	Leominster
WEST MERCIA POLICE - HEREFORDSHIRE	Public administration and defence	Public administration	350	Hereford
WESTON H. & SONS LIMITED	Private - Medium	Manufacturing and engineering	150	Ledbury
WIGGLY WIGGLERS	Private - Small	Wholesale and retail	16	Hereford
WYE MARKETING LIMITED	Private - Micro	Business services	8	Hereford
WYE VALLEY ENGINEERING	Private - Small	Manufacturing and engineering	16	Hereford
WYEVALE NURSERIES LIMITED	Private - Small	Land-based industries	70	Hereford