



**MONASH UNIVERSITY - ACER
CENTRE FOR THE ECONOMICS OF EDUCATION AND TRAINING**

**A Review of Higher Education Equity Research
in Australia 2000-2005**

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CENTRE FOR THE ECONOMICS OF EDUCATION AND TRAINING

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Introduction

This document comprises reviews of 12 documents that report on equity research in Australian higher education. Each review indicates the aims and methodology of the study, outlines its main findings and includes some general comments on the findings, the structure or quality of the study or the issues that it raises.

The selection of documents for review was based on the following criteria:

- The document reports original research
- The document was published between 2000 and 2005.
- The document is publicly available.
- The document provides insights relevant to access to higher education by people from low socio-economic backgrounds and/or about the impact of fees – or fee increases – on participation in higher education.

Each entry in the review includes:

1. The title and author/s of the document.
2. The year published and place of publication
3. The body that commissioned or funded the research (if available)
4. The aims of the research
5. The research methodology
6. The main findings of the research (or main findings relevant to a discussion of fees)
7. Some general comments about the work, e.g. the appropriateness of the methodology, issues covered or omitted etc.

Background

1. Equity groups and research

Based on their under-representation in the student population, six groups are recognised by governments and universities as disadvantaged in relation to higher education in Australia:

- Aboriginal and Torres Strait Islander People
- People from rural and isolated areas
- People from low socio-economic status backgrounds
- People with disabilities
- People from non-English speaking backgrounds
- Women in non-traditional areas and higher degrees by research.

Of these six categories, people of low socio-economic background (low SES) and from rural and isolated areas have made the least progress in increasing their representation in higher education.

During the late 1990s, new understandings emerged of the ways in which disadvantage works for people within these categories and how it impacts on their access to, and participation in higher education. Firstly, the categories themselves, and the notion of identifying under-represented groups in this way came under new scrutiny. A view emerged that while the identification of equity categories may be a useful way to set equity targets and guide equity effort, providing a 'mechanism' for the monitoring of equity performance and outcomes and for guiding the distribution of equity funding and educational opportunities, as a strategy for improving equity it

has a number of shortcomings. It tends to provide a simplified picture of the extent and nature of 'disadvantage', it masks diversity within groups and can set de-facto boundaries around equity programs and activities. The categories themselves reflect historical and not necessarily contemporary patterns of social exclusion and the methods used to construct and measure the categories can be flawed and at the institution level in particular may be of limited usefulness (e.g. Butler and Ferrier 2000, Ferrier and Heagney 2001) .

Secondly, equity research highlighted a considerable degree of overlap in the membership of the categories and found that the problems and barriers that individuals experience as members of multiple equity groups compound to produce even greater disadvantage. Low socio-economic status was also identified as pivotal to what came to be called *multiple or compound disadvantage*. Clarke et al (1997) described low SES as a 'common central element' in the disadvantage experienced by students in other equity categories and affecting the impact of other forms of disadvantage. They noted for instance that low SES females were less likely to overcome the barriers of gender disadvantage than high SES females. Dobson et al (1998) found that more than 80% of low SES students and 60% of rural and isolated students were also members of other equity groups. James et al (1999) studied the attitudes and aspirations of school students towards tertiary education and noted the influence of a complex mix of interacting elements. Rurality and low socio-economic status in particular combined to produce the greatest educational disadvantage

Thirdly, as new understandings emerged of the complexity of disadvantage, its nature, extent and its causes, attention turned to disadvantage outside the boundaries of the established equity groups, i.e. represented by forms other than under-representation in higher education. The characteristics of individual institutions and the local social and economic contexts in which they operated (eg fee-charging regimes, rural/urban locations, the demographic characteristics of catchment populations) consequently assumed a new importance.

For Monash University, Ferrier and Heagney (1999) investigated whether the existing equity categories encompassed all important forms of disadvantage at the university; how strong an emphasis should be placed on the equity categories; and whether there were other forms of disadvantage requiring attention. Their research noted the continued under-representation of people in most of the DETYA equity categories within the university and thus the need for ongoing attention to these groups. However, it also highlighted the existence of multiple group membership that would require special attention and the existence of special difficulties and problems faced by students who were:

- First in the family to attend university
- Suffering financial constraints
- Combining study with family or work responsibilities
- Isolated in the university environment.

The authors coined the phrase 'dynamic disadvantage' to describe the ways in which the disadvantage they saw was created and changed by the continuing interplay of two groups of elements:

- *Barriers and problems created by inflexibility in the policies, activities, rules and regulations of the institution and the understandings of its staff*
Such as entry criteria, timetabling, assessment methods and requirements, eligibility for special consideration, provision of (and access to) resources such as computers and libraries, the domination of particular cultural understandings.
- *Difficulties and problems that relate to the particular circumstances in which individuals find themselves*
Such as the demands of employers or families, low and changing incomes, changing hours of work, accommodation needs, family support and responsibilities, violence or abuse,

They argued that this complex, multi-faceted, changing disadvantage could not successfully be addressed by simple, short-term strategies, but required a response that was sustained, dynamic and multi-faceted and that incorporated initiatives at both the local and institutional levels and flexibility on a scale sufficiently broad to respond to diversity and change (Ferrier and Heagney 2000).

2. HECS and Fees in Australian higher education

Fees for university tuition were abolished in the early 1970s, when the Commonwealth took over the funding of higher education from the states. Fees have been gradually re-introduced since the mid 1980s, when there was a massive expansion in higher education places.

From 1980 overseas students were required to pay annual charges (the Overseas Student Charge), initially equivalent to about 40 per cent of the cost of their courses. From 1986 institutions were permitted to offer full fee places to overseas students. In 1987 and 1988 Australian students were required to pay an annual charge of \$250 (the Higher Education Administration Charge).

From 1989 institutions were permitted to charge regulated fees for non-research postgraduate courses. This was progressively de-regulated so that by the mid 1990s universities could charge and set fees for most postgraduate courses.

The HECS Scheme

The Higher Education Contribution Scheme (HECS) was introduced from 1989, requiring all undergraduate students to contribute towards the cost of their course. This was initially a flat amount of \$1800 p.a. for full-time study.

HECS charges could be paid 'up-front' or deferred and repaid through the tax system, once the student reached a level of income equivalent to average weekly earnings. The HECS debt was indexed to an inflation measure. Students paying up-front, or making additional 'voluntary payments' were given a discount.

Changes introduced from 1997 raised HECS charges and created differential rates for three 'bands' of courses, based on likely future earnings rather than course costs:

<i>Band</i>	<i>Course</i>	<i>HECS full-time study p.a.</i>
1	Arts, Humanities, Social Studies/Behavioural Sciences, Education, Visual/Performing Arts, Nursing, Justice & Legal Studies	\$3,598
2	Mathematics, Computing, other Health Sciences, Agriculture/Renewable Resources, Built Environment/Architecture, Sciences, Engineering/Processing, Administration, Business & Economics	\$5,125
3	Law, Medicine, Medical Science, Dentistry, Dental Services & Veterinary Science	\$5,999

The repayment rates and thresholds were also adjusted so that graduates would begin to repay their HECS debt earlier and repay more quickly. Universities were also permitted to charge tuition fees to domestic undergraduate students outside Commonwealth-funded places, up to 25 per cent of the total enrolments of domestic undergraduates in one course.

From 2005, universities are able to set their own HECS charges for each course within ranges set by the government that replace the previous three bands. Each range begins at \$0 and rises to an amount 30 percent higher than the previous fixed HECS level for each band. Almost all universities have opted to increase their HECS charge by the maximum amount.

Education and Nursing courses have been placed in a fourth band called *National Priorities*, with a range from \$0 to the 2004 level of HECS for Band 1 (\$3854).

The minimum repayment threshold for HECS has been raised to \$30,000. Those with this level of income must repay 4 per cent of their income. The maximum repayment rate has been raised to 8 per cent, this applies to those with incomes over \$60 000 p.a. Discounts for upfront payments have been reduced from 25 to 20 per cent and for voluntary repayments from 15 to 10 per cent.

An income contingent loan scheme (FEE-HELP) has been set up to assist domestic students paying full fees for undergraduate courses.

To soften the impact on disadvantaged students of the rising costs of higher education, two scholarship schemes have been set up. The Commonwealth Education Costs Scholarship aims to assist low SES and indigenous students and provides up to \$2000 p.a. for up to 4 years. The Commonwealth Accommodation Scholarship aims to assist students from rural and isolated areas who have to move in order to study. It provides up to \$4000 p.a.

The effects of the introduction of HECS and fees

There has been substantial debate about the impact of HECS and fees since their introduction. This has particularly focused on students in the government's higher education equity groups, particularly those from low socio-economic backgrounds.

A number of studies based largely on participation data have concluded that HECS and fees have had no to minimal impact. However, other studies have pointed to several effects. For instance an unpublished paper by the Department of Education, Science and training (Aungles et al 2002) found that following the 1997 changes, which saw HECS contributions rise and repayment thresholds lowered:

- The number of applications for higher education from school leavers declined by 9000 students
- The number of mature age applicants declined by 17,000
- There was a decline of 38 percent in the share of low socio-economic status (SES) males in the most expensive HECs courses (eg medicine, dentistry, law and Vet Science)

A survey of undergraduate student finances (Long and Hayden 2003) found that since 1984 the number of hours worked by full-time students in paid work has tripled. There has also been a rise in 'debt aversion' among students, with financial issues increasingly affecting their choice of education sector, study mode and field of study.

Brief overview of the literature

The 12 studies documented here vary in a number of respects. They use a variety of different methodologies, from analysis of statistical data to case studies and interviews. They were commissioned by a number of different bodies – or are the personal work of the authors. They all aim to illuminate some aspect of current equity issues, but address a range of different research questions. Despite their differences however, the studies together provide an interesting and reasonably clear picture of some major ways in which equity research developed in Australia from 2000-2005.

Earlier, it was noted that the research conducted during the latter part of the 1990s brought to the fore the notion of compound disadvantage, the way in which different forms of disadvantage combine to increase the barriers and difficulties that individuals experience in accessing, or participating in, higher education. Low socio-economic status emerged as the central and common element in compound disadvantage, combining with other forms of disadvantage to strengthen the problems and difficulties experienced by individuals in higher education. Disadvantage was exposed as dynamic, existing outside under-representation, and requiring multi-faceted, sustained and flexible responses.

The studies reviewed here build on this earlier work in several respects. They continue a strong focus on people from low socio-economic backgrounds but extend understanding of the factors that influence their participation in higher education through more in-depth work that illuminates how, where, and to what extent, factors at the local level (e.g. schools, neighbourhoods, regional communities) influence their decisions and experiences. This is aided particularly by the (first) use of theories of *habitus* as a tool to analyse data from interviews and case studies.

Secondly they start to provide a new perspective on equity issues across, rather than within the different sectors of education, particularly the post-school sectors of vocational education, higher education and adult education. As the barriers separating the sectors erode, and pathways between them are created and enhanced through changes in policy and practice to meet lifelong learning imperatives, cross-sectoral views and initiatives are of increasing importance and likely to become even more so.

Thirdly, the studies extend understanding of the ways in which financial considerations impact on entry to higher education and ongoing participation. While those analysing and reporting on data on access and participation indicate that rises in fees and charges have had (and will have) little impact, the student finance survey highlights the unprecedented extent to which students now struggle to combine their study with work, and how the study experiences of many are affected by lack of financial resources – including the inability to attend university classes due to lack of money to meet the transport costs. In doing so it suggests that HECS and fees may be having an impact outside access and participation.

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- Long and Hayden (2003), *Paying Their Way, A Survey of Undergraduate Student Finances*, AVCC, Canberra 2000.

Reviewed Documents

1. ANALYSIS OF EQUITY GROUPS IN HIGHER EDUCATION 1991-2002

Richard James, Gabrielle Baldwin, Hamish Coates, Kerri-Lee Krause and Craig McInnis

URL: www.detya.gov.au/highered/programmes/heap.htm#2

Year of publication: 2004

Publisher: Department of Education, Science and Training

Place: Canberra

Commissioning body: Commonwealth Department of Education, Science and Training (DEST)

Aims

DEST asked the authors to:

- analyse and report on the performance of the current equity groups since 1991 (with the exception of Indigenous students).
- analyse the extent to which students experience multiple disadvantage and how this might influence their higher education performance;
- assess whether the current equity groups best reflect those students who are disadvantaged in higher education; and
- assess the adequacy of the current definitions of the equity groups.

Methodology

The authors conducted an analysis of DEST's Higher Education Student Statistics Collection for the period 1991-2002, examining the performance of

- people from low socio-economic backgrounds;
- people from rural or isolated areas;
- people with a disability;
- people from a non-English speaking background; and
- women, especially in non-traditional areas of study and higher degrees.

Performance indicators of access, participation, success and retention for each group were disaggregated by key characteristics, including age, gender, broad field of study (BFOS) / broad field of education (BFOE), level of course, mode of attendance and type of attendance.

Reference values were determined and the performance of each group was measured against them. These values were mixed – some were based on the proportion of the group in the population (census data) others were targets set by DEST.

The data analysis adopted an 'evidence-based approach' underpinned by the 'simple principle' that 'ideally the demographic characteristics of the university student population should reflect the demographic characteristics of the Australian population and that different groups of students once admitted to university should ideally make similar academic progress' (p 10).

Main Findings

The authors found that problems remain with access and participation but the recognised equity groups achieve success and retention at rates close to those of other students. Thus 'there is considerable room to advance equitable access without placing students at risk of failure or non-completion' (p 11).

Beyond access and participation, greater consideration is needed to disadvantage that is not obvious if analysis is restricted to aggregate data alone. For instance, attention is required to major imbalances in field of study, level of course and university by students from low socio-economic backgrounds or from rural or isolated areas.

Socio-economic status remains a dominant factor in disadvantage. For some rural and isolated people, the effects of socio-economic status are significantly heightened by the additional costs of attending university. Renewed efforts are required to raise the participation of low SES people and attention is needed particularly to their under-representation in certain fields of study and in higher degrees.

A more valid measure of individual socio-economic status is needed. Currently SES status is measured using the postcode of the students' home residence - a 'cost-effective mechanism for the purposes of broad classification', but 'blunt and inadequate for measuring both the aggregate patterns and the potential educational disadvantage of individuals' (p 19) Instead, data should be collected on parental occupation (at the time of their secondary education for mature age students) or on the highest level of parental educational attainment. If not possible, smaller geographical areas should be used than postcodes.

Educational disadvantage in rural and isolated areas appears to be substantially a socio-economic effect, but the relationship between SES and location cannot be explored using DEST data because the use of postcodes to determine SES status does not allow SES and locality to be identified separately at the individual level. The rural/isolated/urban classification also requires updating to reflect new classifications used by government agencies.

The overall participation rate for males has fallen to an unprecedented low (43%). If the rate does not increase within two to three years, males should be considered as a possible equity group. Special attention should be given to males from rural and isolated locations, as they are becoming vastly under-represented in higher education.

The achievement of reasonable gender balance across fields of study should be adopted as a goal. Women in the fields of Engineering and Information Technology should be retained as an equity group, with targets of 40% participation. Men in the fields of Nursing, Society and Culture and Education should be designated an equity group, with appropriate targets set for their participation (40% in Society and Culture and Education, and initially 20% in Nursing).

The performance of people of non-English speaking background indicates that this group no longer 'warrants inclusion as an equity group', but should still continue to be monitored. There are differences between language groups, but it is difficult to make sense of any patterns of disadvantage and the small numbers of many groups make it 'virtually impossible to target NESB groups by country of origin' (p 42). Instead individual institutions might identify recent immigrant groups in need of equity support in their local catchment areas— such as Somali immigrants in the west of Melbourne, or Pacific Islanders in Sydney.

While under-representation and lower performance might not adequately capture all dimensions of educational disadvantage, an evidence-based approach to monitoring equity group performance is not possible without quantitative measures of other forms of disadvantage. These are not yet available and thus it is not possible to supplement or replace under-representation as the principal quantitative indicator of disadvantage.

Though there is a tension between the types of disadvantage experienced by individuals and the formal recognition of group disadvantage based primarily on under-representation an evidence-based approach requires a means of measuring individual disadvantage that takes into account multiple factors. Such methodological tools are not yet available.

There is little evidence that disadvantaged population sub-groups exist that are not subsumed by one of the categories within the present policy framework. There is a limitation to the conclusions which can be drawn from census data, however, as comparable variables are not available in the DEST collection.

The main overlap between groups is between the Low SES, rural and isolated and indigenous categories, but the use of postcode to define both low SES and rurality prevents further analysis of this overlap. The number of students in 3 or more equity groups is very small and also prevents further analysis.

Similar work could be done in Australia to develop robust and reliable indicators of 'school background', as is occurring in the UK. School sector (state/private) would not be an appropriate measure but consideration could be given to:

- average ENTER (or equivalent) results for individual schools (following the U.K. model);
- rates of transition to higher education from individual schools.

General Comments

A competent analysis of the data available, if frustrating because the ability to expose some patterns of disadvantage and to draw conclusions is hampered by data limitations, the lack of comparable data in the census and DEST collections, and by current definitions of SES status in particular.

Some sub-groups within the equity groups are recognised and the report gives some attention to the possibility of considering school under-representation as an indicator of disadvantage.

The report was commissioned at a time there was growing discussion among university's equity officers, and some equity researchers, about the existence of multiple (or compound) disadvantage and disadvantage outside the groups formally recognised by DEST. The bibliography is limited and this is reflected in the lack of attention paid to groups identified in these discussions and recent literature as possibly requiring more formal recognition of their disadvantage – such as students who are 'first in the family to attend university', students working full-time, or with family responsibilities. While the report indicates that the authors do not believe there are additional disadvantaged groups not subsumed within at least one of the existing equity groups, it does not directly indicate which particular groups they mean by this – it would have been useful if they had spelled out which additional groups they examined in coming to this conclusion.

While the analysis of the statistical data available is useful particularly in examining and exposing under-representation, a more open, eclectic approach to the nature of evidence of disadvantage might have enabled a stronger light to be cast on some of the new forms of disadvantage that are now being discussed, such as disadvantage experienced by some students as a result of elements in the university environment – eg lack of flexibility in programs, timetables – or as a result of their lack of knowledge or familiarity with university practices.

2. PAYING THEIR WAY. A SURVEY OF UNDERGRADUATE STUDENT FINANCES, 2000

Michael Long and Martin Hayden

URL: www.avcc.edu.au/documents/publications/policy/statements/final_report_rev_22_oct_01.pdf

Commissioning body: Australian Vice-Chancellor's Committee (AVCC)

Year of publication: October 2001

Publisher: AVCC

Place: Canberra

Aims

To identify the income, expenditure and debt profiles of domestic undergraduate students at Australian public universities; and the impact of their financial circumstances on their studies.

Methodology

A postal questionnaire survey of a sample of non-overseas students at 19 of the 37 public universities. Questionnaires were sent to 84,591 students. 34,752 responded, giving a response rate of 41.1 per cent. Participating universities were self-selected. Major research universities are appropriately represented. Technology universities are over-represented and regional universities and metropolitan universities very slightly under-represented. Responses are weighted because similar numbers of students were selected from each university, but universities vary in student numbers. Responses of male and younger students are also weighted due to a slight bias in the sample is noted toward female and older students.

Information was sought from respondents about their:

- *Background characteristics:* sex, age, country of birth, language spoken at home, Indigenous status, family socioeconomic status, type of school attended, sole care-giver status, dependent children, disability, moved to attend university.
- *Enrolment and financial characteristics:* full- or part-time enrolment, field of study, level of qualification, year of commencement, receipt of government financial support, living arrangements, sources of financial support, participation in paid employment, income, expenses, payment of course fees, loan to continue studies.
- *Outcomes:* choice of course, choice of university, choice of mode of study, attendance at classes, adverse effect on study.

Students were also asked to contribute additional comments.

Some findings are compared with those of earlier surveys.

Main Findings

The authors found that for a large number of students the quality of their educational experience is being undermined by adverse financial circumstances. Financial difficulty correlates with:

- A lower likelihood of having paid the Higher Education Contributions Scheme (HECS) charge up-front
- a greater likelihood of having a budget deficit
- a greater likelihood of having to borrow money to continue studies.

Financial circumstances also influence student choices regarding course undertaken (11.1%), university attended (17.4%) and mode of study (23.3%).

More specifically:

- Annual student budgets are in overall deficit by an estimated 21 per cent -- in the case of full-time students, 42 per cent. Though this deficit is lower than in 1984 the proportion of students in paid work during university semester has increased substantially as has the average number of hours of work.
- 7 out of 10 students are in paid employment during university semesters –an increase by about one-half since 1984 - and 1 in 10 students 'frequently' misses classes because of that work. Work adversely affects study 'a great deal' for two in every ten students in paid employment during semester.
- Among full-time students, the average number of hours worked by those in paid employment during semester has increased three-fold since 1984 to 14.5 hours per week.
- 1 in 10 students obtains a loan in order to be able to continue studying – and the average amount borrowed (\$4,000) is substantial given that the mean income of females is \$9,080 and for males \$8,763.
- Of students who have financially dependent children, nearly two in ten miss classes 'sometimes' or 'frequently' because they cannot afford childcare.
- 1 in 10 students miss classes 'sometimes' or 'frequently' because they cannot afford travel to university.

General Comments:

This is a highly detailed study, which uncovers and explains complex patterns clearly and makes useful comparisons with the results of previous similar surveys to demonstrate changes over time. It usefully charts students' financial circumstances, their income and expenditure patterns, their participation in work and study and the ways in which their financial circumstances affect their study.

The study points to students' difficulties with, and aversion to debt. It notes 'a sense of despair' (p 58) among students about the level of their debt and ways in which they act to avoid or defer debt as much as possible.

It suggests that students' have mixed views of HECS - they support the scheme as an alternative to the payment of up-front fees – ie, as the lesser of two evils - even though it can result in levels of debt that many consider worrying. It also notes concern among HECs students about the level of additional student administration/union/guild fees and other 'hidden' fees (eg for computer usage, course materials).

The study implies that any further rises in HECs and course fees might cause considerable difficulties for some, perhaps many, students, and impact on participation and influence study choices.

3. SOCIOECONOMIC BACKGROUND AND HIGHER EDUCATION PARTICIPATION: AN ANALYSIS OF SCHOOL STUDENTS' ASPIRATIONS AND EXPECTATIONS

Richard James

URL: www.dest.gov.au/archive/highered/eippubs/eip02_5/eip02_5.pdf

Commissioning body: DEST Higher Education Group Evaluations and Investigations Programme.

Year of publication: April 2002

Publisher: DEST

Place: Canberra

Aims

To investigate senior school students' attitudes and intentions regarding higher education according to their socio-economic background, taking into account geographical location, gender and other possible influences on their decision-making.

Methodology

A further analysis of data on students' socio-economic background collected in a broader survey undertaken in 1999 of school students and their attitudes toward higher education.

The original survey comprised a targeted sample of urban/rural/isolated and lower/medium/higher socioeconomic background Year 10–12 students in three states: Victoria, New South Wales, and Western Australia. 17000 questionnaires were distributed: 8000 mailed directly to students' homes and 9000 distributed to schools. 7023 responses were received. Respondents were asked about their personal objectives and intentions, particularly in regard to post-secondary education. In addition interviews were conducted with student focus groups in twenty rural or isolated schools in two states.

The analysis trialed 3 different approaches to measuring socio-economic status and following this process decided to use the highest level of education attainment of the most educated parent in all further analysis.

Main Findings

The study found that most students express a desire to go on to some form of further education after they leave school, but their specific aspirations and intentions are strongly influenced by socio-economic background, gender, and geographical location.

Considering students' personal aspirations and expectations for higher education, the study documents a set of potentially encouraging effects that are consistently stronger for students from higher socioeconomic backgrounds'; and 'the cumulative effect of discouraging or inhibiting factors that are more prevalent for students from lower socio-economic backgrounds' (p 45).

Socioeconomic background is the major factor in the variation in student perspectives on the value and attainability of higher education:

- Students from lower socioeconomic backgrounds show a slightly weaker commitment to staying at school, are less likely to discuss their school work with members of their family, and less likely to believe their parents encourage them to do well at school (p 18). They also have a far weaker belief that their parents want them to do a university course (44 per cent, compared with 68 per cent of other students) (p 34).
- Students of lower socioeconomic background tend to have less faith in the relevance of learning in formal settings (p 19).
- The levels of both perceived encouragement and discussion of school work rise according to family socioeconomic status (p 22).
- Students from lower socioeconomic backgrounds place more emphasis, or have more reliance, on the advice of career advisers than students from higher socioeconomic backgrounds, regardless of their particular geographical location (p 23).
- Over three-quarters of higher socioeconomic background students report a preference for higher education compared with a little over half of the students from lower socioeconomic backgrounds (p 25)
- One third of students from lower socioeconomic backgrounds express a preference for TAFE (ie a vocational course) compared with 14 per cent of students from higher socioeconomic backgrounds (p 26).
- Lower socioeconomic background students are more reserved in their opinions on whether 'a university degree is a good investment in the future', whether 'university study allows you to explore interesting things' and whether 'life at university sounds exciting' (p 28).
- Students from lower and medium socioeconomic backgrounds are less likely to be positive about the potential future benefits of time spent at university (p 29).
- Higher socioeconomic background students have greater confidence in the likelihood they will pursue university study (nearly 70 per cent of them) than lower or medium socioeconomic background students (42 and 50 per cent respectively) (p 31)
- Students from lower socioeconomic backgrounds perceive achievement barriers in their way to entering university; they are less confident that their academic results will be good enough for entry to courses that interest them (38 per cent, compared with 25 per cent); and they are more likely to believe they won't have the subjects required (24 per cent, compared with 15 per cent) (p 34).
- Students from lower socioeconomic backgrounds are more likely to report concerns about costs: they are more likely to believe the cost of university fees may stop them attending university (39 per cent, compared with 23 per cent) and that their family probably could not afford the costs of supporting them at university (41 per cent, compared with 23 per cent). Thirty-six per cent of lower SES students indicate that they would have to support themselves financially if they went to university (p 34).
- Lower socioeconomic background students are less likely to believe that a university degree will assist them with employment and careers or to be interested in the subjects they could study at university (p36).

- Compared with the females in the sample, males show less commitment towards school and are less likely to see higher education as being relevant and attainable for them. These effects are most pronounced for males from lower socioeconomic backgrounds p 39).

The study concludes that while potential financial obstacles to university entry, or even the perceived costs associated with higher education, contribute to lower participation rates, the predominant influence may be the perceived relevance of higher education. Psychological or psycho-social factors result in differing levels of importance and value being attached to higher education. These are not factors that can be rapidly influenced through short-term policy measures (p 51).

General Comments

This very interesting and informative analysis highlights differences in the views, aspirations and intentions re higher education of students from different SES backgrounds , with a strong focus on low SES students.

While it acknowledges that the findings have implications for equity programs and supports, it does not specify recommendations for action by governments or universities, but notes the need for further research to inform policy making.

An important finding of the study is that while financial considerations are important in influencing student-decision making, and ultimately attending university will depend on having the required level of financial support, more important still are attitudes towards the value and attainability of higher education, particularly its usefulness to students in their future careers.

This suggests that rises in fees or HECs may have some impact on lower SES students' participation in higher education, but that this effect may be ameliorated by other factors and that students' decisions about whether or not to continue to university will largely depend on their views of the value and relevance of higher education.

4. FACTORS IMPACTING ON STUDENT ASPIRATIONS AND EXPECTATIONS IN REGIONAL AUSTRALIA

Nola Alloway, Pam Gilbert, Rob Gilbert, Sandy Muspratt

URL: http://www.dest.gov.au/highered/eippubs/eip04_1/eip_04_01.pdf

Commissioning body: DEST Higher Education Group Evaluations and Investigations Programme.

Year of publication: 2004

Publisher: DEST

Place: Canberra (internet only)

Aims

To:

- Provide a better understanding of the aspirations and expectations of students in regional areas of Australia
- Identify the underlying factors that drive those aspirations and expectations, in particular, any factors differentiating the aspirations and expectations of students in regional areas from those of their urban counterparts – the 'rurality' factor(s)
- Identify barriers that might hinder students' pursuit of their aspirations
- Identify strategies that have proven effective in enhancing and sustaining the aspirations and expectations of students in regional areas.

Methodology

Focus group interviews of students, teachers and parents from 15 different communities - 13 at regional sites drawn from all States and Territories (except the ACT) and 2 metropolitan sites in Melbourne. Selection of the 13 regional sites took into consideration the need for a range of small to medium sized towns and their hinterlands, as well as a large metropolitan city; the range of degrees of accessibility/ remoteness, using the Accessibility/ Remoteness Index of Australia from the Commonwealth Department of Health and Aged Care; type of settlement (coastal strip or closely settled areas, traditional inland agricultural communities, and remote regional or mining communities); and the impact of socioeconomic change on work and industry, household and demographic structure and public policy and investment.

Interviews were semi-structured and interactive, with open-ended questions, flexible and negotiated in the course of the group interactions on each site (p 13).

A three part literature review included an analysis of relevant data from national and regional sources and previous studies and a review of strategies that have proven effective in supporting students.

Main Findings

Most students aspire to some form of further education when they finish school. This often involves leaving their communities – especially ‘vulnerable communities’. The more vulnerable the local economy, the more adamant were students that they would leave to escape what they saw as unpromising and untenable futures. Students appear well-informed about post-school education options, including articulated pathways.

Students view their futures as being located within or outside of rural communities in gendered ways. Students expressed a ‘common belief’ noted in the literature that rural communities are male spaces, which helps to explain why more rural girls than boys see their future in tertiary studies often outside of the communities and more rural boys than rural girls see their future in local offerings of trades and apprenticeships. Data show that rural boys are more likely to leave school before beginning Year 11 than rural girls, and more likely to leave school early than metropolitan girls or boys.

Students, parents and teachers are concerned about the availability of specialist teachers, the range of subject choice, recruitment and retention of teachers, and the variable quality of schooling in rural and remote areas. Teachers are concerned also about the growth of paid employment among students and note that this might require some re-thinking of school practices. Parents and teachers believe occupations and careers need to be visible in the community if students are to envisage them as future options and note a lack of ‘occupational models’ in rural communities. They note also limited educational opportunities (curricular and extra-curricular opportunities) compared with metropolitan centres.

Students believe that financial considerations might hinder their aspirations. For most rural students and their parents, the likely cost involved in pursuing aspirations, especially where students must leave town to pursue higher levels of education and training, was a persistent concern. ‘The final reality for students was the realisation that fulfillment of their aspirations and expectations was bound inevitably to their capacity to finance them’ (p 262).

Though students ‘generally value the prospects of further education and training regardless of whether they are from rural, remote or metropolitan regions’, ‘when it came to the point of pursuing their dreams of post-school education and training, those living in rural and remote communities were (unevenly) united in their (in)capacity to ‘reach it and touch it’ (p 256).

Rural and remote communities differ in ways that 'seriously contested the notion of a distinctive rurality factor being at play in the formation of student aspirations and expectations' (p 257)

Types of strategies successful in supporting students to achieve their goals are:

- Educational system initiatives
- Institutional networking
- Industry initiatives
- Community initiatives
- Government arrangements and incentives, and
- Forces of globalisation and information and communication technologies.

Examples include

- Year 13 programs – giving students opportunities to improve their Year 12 results or to take longer to complete their last years of schooling.
- Expansion of curriculum offerings - eg to include more vocational subjects, and the development of arrangements between schools, and the use of distance and virtual learning, to expand other study options and opportunities for students.
- Outreach programs– 'Universities and other training and education providers have been extending their networks of operations into the rural sector and in regions where this has happened, focus group students spoke about the positive way in which their dreams had been supported' (p 252).
- Use of ICTs – to expand learning options and create a sense of connectedness between rural and isolated communities and the world.
- Industry initiatives - providing opportunities for students to gain work experience and combine work and study.

General Comments

The authors set out to look for a distinctive 'rurality factor' that shapes school students' aspirations and expectations, but did not find it – mainly due to the diversity they identified among rural communities. However, they did note many ways in which living in rural or remote regions impacts on students' views and intentions.

The analysis highlights the complexities in many of the issues discussed and thus difficulties in drawing definitive conclusions. The authors acknowledge the limitations in using focus groups but the inclusion of many direct quotes from group participants adds an authentic voice to the analysis of the material.

The report is very long – largely due to the 3 part literature review - and includes an extensive reference list.

It includes recommendations for action by teachers, education systems, education and training providers, researchers and governments.

5. FACTORS AFFECTING FIRST YEAR STUDENTS' DECISIONS TO LEAVE UNIVERSITY

A Elliott

URL: www.qut.edu.au/talss/fye/papers02/Elliottpaper.doc

Year of publication: 2002

Publisher: Queensland University of Technology

Place: In 'Changing agendas 'Te Ao Hurihuri', proceedings of the Sixth Pacific Rim Conference [on] First Year in Higher Education, 8-10 July 2002, University of Canterbury, Christchurch, New Zealand' edited by D Nulty. Brisbane

Aims

To identify factors affecting early childhood teacher education students' decisions to leave university in their first year of enrolment with a view to offering better academic support programs.

Methodology

Students were in the first year of an undergraduate program in early childhood education in a large metropolitan university. Interviews were conducted with 35 discontinuing female students in recent cohorts. Interviews sought information about six variables drawn from longitudinal studies of attrition: (1) background characteristics relating to the individual situation, such as personal well being, family status, employment status, and financial considerations; (2) pre-college experiences and achievements; (3) vocational goals and commitment; (4) academic adjustment and expectations; (5) work and home influences; and (6) student culture and environment.

The author notes that in recent years, the student body within early childhood teacher education in the university where this study was based has changed from being predominantly female, Anglo-Australian school leavers under 20 years to a socio-culturally diverse, but still female population, with substantially more mature women, many from low- income backgrounds. About half of recent student cohorts are non school leavers with a range of pre-tertiary experiences and significant family and related work responsibilities. Few students have a mother (15%) or father (21%) who attended university (Barrie, 1999). In recent years, attrition rates have increased with about half of a commencing student intake of 100-130 students withdrawing or taking extended leave of absence by the end of the first academic year.

Main Findings

A complex web of factors influence students' decisions to withdraw or take extended leave. Three common factors underly these decisions - personal or family illness (including stress related conditions), competing family responsibilities and financial difficulties – but the interplay of factors is unique for each individual. In many cases all three factors combine to create a “flash point” that results in the decision to withdraw. The factors have a cumulative effect over time – often beginning prior to enrolment. Logistical, or time management difficulties are also common among discontinuing students.

Many students are influenced by events and circumstances that seem to happen by chance or circumstances beyond their control, but which are largely predictable products of combinations of economic vulnerability, cultural backgrounds and traditions, gender, and a volatile and depressed community economic climate. Students' decision- making may also be affected by a perception that their primary role is to support their family and/or partner, and by the demands of on-campus university study with no flexible learning component. Factors traditionally associated with student persistence such as pre-tertiary academic performance, course difficulty or identification with university culture appeared to have little influence. More important are more fundamental issues related to family welfare, health and financial difficulties.

General Comments

This short paper based on a small scale study is of interest because it highlights some challenges for institutions in dealing with a student body that is becoming more diverse, including more older students with responsibilities, more students who are the first in their family to attend university, and students from varying socio-economic and ethnic backgrounds. As the author concludes, ‘policies guaranteeing equality of access are meaningless if they amount to merely removing formal barriers to university enrolment. What’s needed are true enabling practices and policies, that recognise and actively support the contexts of students’ identities and experiences’.

It would have been interesting and potentially useful to know, but is not indicated, if and how the characteristics of the discontinuing students differed from those continuing in the program. The study suggests that they may be mostly students with family or work responsibilities and with little

previous experience of tertiary study, but this is not completely clear and no firm conclusions are possible.

The study points to the need for action within the education program it discusses to provide greater support for students, especially those facing the types of difficulties it uncovers. To what extent similar supports would be needed and valuable throughout the rest of the university cannot be determined due to the small scale of the study. The issues the study raises are important ones though and thus might usefully be explored in further, wider research across different courses and programs and even institutions.

6. CROSSING THE LINE : A STUDY OF PEER INFLUENCE ON STUDENTS FROM LOW INCOME BACKGROUNDS IN TRANSITION FROM SCHOOL TO UNIVERSITY

D. Bland

URL: www.aare.edu.au/02pap/bla02263.htm

Year of Publication: 2002

Publisher: Australian Association for Research in Education (AARE)

Place: In 'AARE 2002 Conference Papers' [computer file] : [Conference of the Australian Association for Research in Education, 1-5 December 2002] compiled by P L Jeffrey. Melbourne.

Aims

To examine the senior secondary school and early university experiences of low socio-economic status (low SES) students who have achieved some amount of academic success to inform tertiary access and support programs for low SES students

Methodology

A variety of interview techniques - small focus groups, individual interviews, and on-line discussion. Participants were 12 student volunteers, drawn from a university access and support initiative for low SES students and comprising 10 females and two males, aged between 18 and 24. Their enrolment ranged from first year to the final year of a four year degree. They were enrolled in various courses, with five of the students undertaking Education degrees and three enrolled in double degrees.

A focus was placed on the question of 'cultural suicide', which proposes that students from educationally disadvantaged backgrounds must make a clean break from the communities and cultures in which they were raised in order to achieve academic success- defined as completing Year 12 and commencing an undergraduate course.

Main Findings

Middle-class standards and values permeated the participants' schools and these schools created policy, such as uniform codes, that failed to acknowledge the realities of the low SES students. Divisions among the student peer groups saw low SES students excluded from the mainstream and created feelings of isolation in their formative years of schooling. However, this improved in the students' final years of study, partly because the uninterested or less academically-inclined students had left school, and partly because of additional encouragement from teachers and friends.

Low family income limited the participants' choice of school to attend regardless of the quality of education offered. However, the families of some were prepared to invest in promoting their children through education. Other students found work to provide economic capital and other people who could give them encouragement.

Despite the nature of their schools and peer groups, the students acquired cultural capital, many acknowledging the efforts of individual teachers. The influence of peers was less direct and often caused participants to react by turning to education as a source of refuge and as a means of self-improvement. Schools offered participants the opportunity to interact with the field of education as a refuge from domestic and/or social tensions, and a means of self-improvement and social mobility. Thus they came to see education as the most accessible means of upward mobility or deliverance from their domestic and social difficulties. (This may help to explain why many chose the field of Education for their tertiary studies.)

At school, some of the participants deliberately isolated themselves from their peer groups and sought out friends they felt were more appropriate to their own aims and interests. For most of them, friends were strategic considerations rather than merely social companions. Others chose friends specifically on the basis of their academic inclination. Friendships with students from other backgrounds (eg more affluent) tended to be temporary relationships which dissolved when the participant overstepped unspoken rules of social place.

Mobility, either through re-orientation of individual thinking or through physical relocation, proved a turning point for most participants. A number reported that a move to another school provided opportunities for a positive change in their social and educational lives.

While the participants appeared to be very aware of economic divisions in their schools and peer groups, they did not seem to be aware of cultural differences affecting these divisions. Nor did they demonstrate any consciousness of class - their references to working-class experiences were limited to financial matters. They seemed to lack any inclination towards solidarity with their working-class peers. While acts of cultural suicide may have happened they did not appear to be the kind of dramatic and terminal act suggested by the concept

The comments of some of the participants demonstrated a certain disdain about their school peers. Students who had been "looked down on" by peers were now taking a judgmental view of them. Some also appeared judgmental about family members.

The socialising processes of the access and support program offered by the institution enabled participants to gain a sense of belonging and the strong peer networks essential for non-traditional students to make a successful transition to university. Participants expressed concern about budget cuts to this program.

General Comments

This was a small-scale study but its focus on the notion of 'cultural suicide' provides an unusual and interesting new perspective on the transition of low SES students from school to university.

The study documents the difficulties that students from low SES backgrounds face in pursuing academic goals well before they enter university and how this distances them from their peer group but also does not allow them to be fully accepted by other students with similar goals, but from very different backgrounds. It creates a picture of these students as having to possess high levels of persistence and confidence, but also notes the importance of the encouragement they have received from teachers, parents and others.

It also portrays schools as places where these students face difficulties, implying that schools need to work harder to address their needs. This is contrasted with the supports offered as these students enter university – however in raising the issue of budget cuts to the programs offering this support it implies that universities also may not be fully committed to assisting these students.

Although the study is unable to conclude that its participants did have to commit 'cultural suicide' in order to achieve academic success, it nevertheless notes ways in which they have had to break away from their peer group, some of the pain that this has caused them, how this process has been

helped by extending the physical distance between them and their former life, and finally suggests that having made this break they now look down on their former peers. Though they may not quite have committed 'cultural suicide' it thus indicates that they have still undergone dramatic and difficult change that has left its mark on them.

7. EQUITY IN ACCESS TO HIGHER EDUCATION REVISITED

B Birrell, A Calderon, I R Dobson, T Smith

URL: http://elecpress.monash.edu.au/pnp/free/pnpv8n1/v8n1_6birrelldobson.pdf

Year of Publication: 2000

Publisher: Place: People and Place; v.8 n.1 p.50-61

Aims

The paper begins by noting that there was no improvement in access to higher education by people from low socio-economic backgrounds during the 1990s. It further notes the existence of a debate about the effect of income levels and the availability of financial support on participation in higher education by young people, with some policy makers and researchers suggesting that these are less important than cultural factors.

To contribute to this debate, the paper explores the links between participation in higher education and family income; parental occupation (ie the occupation of the 'reference person' – usually the father); and private schooling.

Methodology

The authors re-examine data from studies by others and analyse census data on family income, parental occupation, schooling and participation in higher education by 18 and 19 year olds 'living at home'.

Main Findings

The authors find that there is a link between the level of family income and participation in higher education by 18-19 year olds living at home: the higher the family income the greater the higher education participation rate. Higher incomes are also associated with private schooling. Those who attend Independent (private) schools enter higher education at rates considerably above those who attend government or Catholic schools.

In the middle income range, participation in higher education is strongest where parental occupations are classified as professional and lowest where families have similar incomes but parental occupations are classified as clerical or blue collar. From this the authors conclude that 'cultural and other related factors' influence entrance to university. They note that the effect appears to be stronger for young males than females.

With the exception of people in professional and managerial occupations, the participation rates for low income people are similar to those with middle level incomes. The authors attribute this to the availability of income support for students from families with low level incomes.

Across all income levels and occupations, participation in higher education is stronger among females than males, with the gap widest in blue collar occupations. The authors indicate that the presented data, and unrepresented data on 18-19 year olds not living at home, does not support a hypothesis that young males from these occupational backgrounds participate in TAFE rather than university.

The authors conclude that both family income and cultural factors influence participation by 18-18 year olds in higher education and that the effect of cultural factors is particularly strong on young males from 'working class' backgrounds. They look to governments to provide better resources for government schools, to improve the rate at which their students enter higher education, and they call for policy initiatives to encourage more of these young males to enter higher education.

General Comments

This is an interesting paper that makes a useful contribution to the debate on the role of income and financial support v the effect of cultural and other factors in influencing participation in higher education. It underlines the role that private schooling plays in providing a pathway to higher education and provides an indication of the importance of financial support in enabling participation in higher education by young people from low-income families.

There are some minor drawbacks in the census data that the authors use, or present:

Data is presented only for 18-19 year olds *living at home*. The proportion of the age group not living at home appears to be substantial – the authors indicate 35 per cent.

Parental occupation is classified according to the 'reference person' which the authors note is generally the father. Other studies have found mothers' occupations to be a more significant determinant of participation in higher education than fathers'.

Use of 1996 census data precludes consideration of any impact on participation of the increases in the Higher Education Contribution Scheme (HECS) that occurred.

In addition, the paper would have been strengthened by the inclusion of some further data on the post-school destinations of young males, particularly those whose parents are in clerical or trades occupations. In indicating that the proportions entering either higher education or TAFE are small the authors raise the question: where do they go? This question – and whether the young males receive other forms of training or education – would need to be considered in framing the policy responses that the authors seek.

8. EFFECT OF CAMPUS PROXIMITY AND SOCIO-ECONOMIC STATUS ON UNIVERSITY PARTICIPATION RATES IN REGIONS.

S Stevenson, C Evans, M Maclachan, T Karmel, R Blakers

URL: www.dest.gov.au/archive/highered/occpaper/01c/default.htm

Commissioning body: DEST

Year of Publication: 2001.

Publisher: DEST

Place: Canberra

Aims

This study responds to a report by the OECD, which found that that social, home and educational factors combine to explain educational disadvantage, and that these tend to be located in 'particular spatial and geographical settings'.

It builds on an earlier study by Stevenson which found that while there was a stronger relationship between regional participation in higher education and university provision in non-metropolitan than in metropolitan areas, there were indications that factors other than proximity to a campus were important. It aimed to explore these other factors, particularly socio-economic status.

Methodology

This study uses multivariate analysis to ‘explore the relative importance of socio-economic characteristics and access to university campuses in determining participation rates in metropolitan and non-metropolitan regions.’

The study considers 290 regions in Australia based on census divisions and classified as either ‘metropolitan’ or ‘non-metropolitan’.

Each region is identified as having a particular socio-economic status. This is derived by using two indexes from the 1996 Census—the Index of Economic Resources and the Index of Education and Occupation. The first centres on the economic resources of households within the region and includes variables based on income, expenditure, home ownership, dwelling size and car ownership of families. High index values indicate that the region has a higher proportion of families on high income, a lower proportion of low-income families, more households purchasing or owning dwellings and living in large houses.

The second index indicates the educational and occupational structure of communities. High index values indicate that a region has a high concentration of persons with higher education or undergoing further education, and people employed in the higher skilled occupations.

The higher education participation rate for each region is the percentage of 19–21-year-olds who lived there five years ago and are currently attending university, with data being derived from the 1996 census.

An indicator of ‘proximity to higher education’ for the population within each region is based on a formula that considers the size of the nearest campus (measured by EFTSU – equivalent full time student units) and the location of the campus (distance from the centre of the region).

Main Findings

The authors find that, university participation of 19–21 year-olds in August 1996 ranged from 3.5 to 64.2 per cent across the 290 regions. The national average was 24.2 per cent, with the average in metropolitan regions 26.6 per cent and 18.8 per cent in non-metropolitan regions.

The number of university places per head of population is significantly lower in non-metropolitan areas. Proximity to university campuses and the socio-economic status of regions both contribute to university participation.

Across metropolitan regions much of the variation in participation rates can be explained by differences in educational aspirations (as measured by education and occupation levels), though access and the level of economic resources are also important.

Across non-metropolitan regions there is less variation in participation and no single reason explains it. The level of economic resources and access is only marginally more important than the level of education and occupation. Holding socio-economic status constant, regions with sizable campuses have participation rates that are around only three percentage points higher than regions with virtually no access.

The difference between average metropolitan and non-metropolitan participation rates cannot be explained fully by the variables used in the analysis

The authors conclude that building campuses in non-metropolitan regions would not help to raise university participation rates to the levels found in metropolitan regions because ‘overall perceptions of the value of university education are more important and need to change in non-metropolitan regions’.

General Comments

This is a complex statistical analysis that does well in attempting to deal with difficulties in defining access to higher education within regions, the socio-economic status of regions; and participation by people from a particular region.

Much of the report consists of statistical appendices.

Participation in higher education by people from rural and remote Australia remains problematic. This study indicates that a combination of factors contributes to this pattern, so that improving access alone would not be sufficient to raise participation.

9. LONGITUDINAL STUDY OF AUSTRALIAN YOUTH RESEARCH REPORT NO 40: THE FIRST YEAR EXPERIENCE: THE TRANSITION FROM SECONDARY SCHOOL TO UNIVERSITY AND TAFE IN AUSTRALIA

Kylie Hillman

URL: www.acer.edu.au/research/projects/lsay/reports/lsay40.pdf

Year of Publication: 2005

Publisher: Australian Council for Educational Research

Place: Melbourne

Aims

The Longitudinal Surveys of Australian Youth (LSAY) follow the progress of cohorts of young Australians as they make the transition from secondary school to work and further education and training.

This report focuses on young people who were in Year 9 in 1998, and who first entered tertiary education during 2002. It aims to:

- Describe the first year experience impressions, satisfaction and areas of difficulty for students at universities and TAFE institutions.
- Analyse the 'outcomes' of first experience of tertiary study—rates of deferral, withdrawal, course and institution change or persistence with first course of study for the entire sample and by various student characteristics.
- Analyse the outcomes and experiences of students belonging to the six higher education equity groups (p. 62)

Methodology

The study analyses data collected in successive surveys of a cohort of young people who were in Year 9 in 1998.

Main Findings

Satisfaction:

The study indicated high levels of satisfaction among both TAFE and university students with most aspects of their course and student life. Results showed little to no differences in the experiences of university and TAFE students of different gender, with varying levels of school achievement, plans for post-school study and attitudes towards school.

The vast majority of students agreed or strongly agreed that they liked being a student (94%), that tertiary student life suited them (87%), they enjoyed the atmosphere on campus (88%), and that they had made close friends at their tertiary institution (89%). Over 80% indicated that the tertiary experience had lived up to their expectations.

Students from most of the equity groups tended to report higher agreement with the satisfaction items than other students.

Difficulties

Students faced difficulties in juggling study, work and personal relationships. 47% reported difficulties juggling work and study; 40% indicated difficulties finding time for other commitments and 29% reported difficulties balancing personal relationships and study.

The majority of the students at both university and TAFE were in employment. Slightly more than 60% were in part-time work and a further 6% work full-time. Median hours worked per week were 12 part-time and 38 for full-time workers and 38 hours, respectively University students studying part-time reported more problems juggling work and study and balancing personal relationships with study than students studying full-time. University and TAFE students who were studying their course full-time reported a higher level of integration into the tertiary community than part-time students.

Students from socio-economically disadvantaged backgrounds reported difficulties in most areas more frequently than other students but there was no association between the main problem reported by these students and their socio-economic background

Outcomes

The vast majority of students remained in their initial course at their initial institution. Small proportions changed course (2%) or institution (1%). Slightly more than 6% withdrew and 4% deferred their study. There were significant associations between changes in initial enrolments and a number of individual, background and current environment characteristics, such as plans for post-secondary education, parents' educational attainment and type of university attended. There were no significant gender differences.

Significant differences in the outcomes of first year enrolments were found for two of the student groups: Students from rural and isolated location backgrounds were less likely to change institutions during their first year of tertiary study than other students (although this difference was not large), and Indigenous students were more likely to withdraw from study during their first year, compared to non-Indigenous students.

Fees and Study Costs:

Financial difficulties, such as paying course fees or other study-related costs, were a relatively common experience and for certain groups of students in particular.

About a quarter of the university students reported difficulties in paying fees or other course costs, with the proportion of females only very slightly higher than the proportion of males (26% females, 24% of males). Fewer TAFE students reported this difficulty.

Students who had attended independent secondary schools reported fewer problems in paying course fees and other study related expenses than students who had attended Catholic or government secondary schools.

A larger proportion of students at Regional universities than students at other universities reported payment of course fees or other study-related costs as their main source of difficulty. Students at the large traditional research universities – the 'Group of Eight' were less likely to indicate that paying for fees had been their greatest problem during the year.

A greater proportion of students from rural or remote location backgrounds than other students reported problems paying their course fees or other study-related costs as their main source of difficulty (15% of rural or remote students, compared with 11% of those from other areas).

39% of Indigenous students reported difficulties in paying course fees and other study-related costs compared to 23% of non-Indigenous students. Eight of the Indigenous students were from low socioeconomic backgrounds (16%) and 19 also met criteria for inclusion in the rural/isolated background equity group (37%).

The proportion of students from socio-economically disadvantaged backgrounds reporting difficulties in paying fees or study costs was slightly higher (27%) than the proportion of other students reporting this difficulty (23%).

University students with two parents who had attended university were less likely than other students to identify paying fees and other study-related costs as their main problem.

Over 40% of students who were looking for work reported difficulty paying fees or other study costs, compared with less than 25% of students who were working (fulltime and part-time) and students who were not looking for work.

General Comments:

The report is generally a positive one, finding that most of the students surveyed were satisfied with their studies and with student life.

However, the report also points to some areas of concern where attention may be required to assist students to ensure they are successful in their study, particularly students from equity groups.

Firstly, the results support the existence of strong pressures on the majority of students to combine their study with work. The vast majority of students are either in, or looking for work, although most are studying full-time. Overall about a quarter of the students report difficulties in paying fees and meeting other study costs, but the proportion is higher among those looking for work – as well as among some sub-groups of students, including some equity groups. The findings raise two questions: would financial difficulties be more widely reported if so many students were not in part-time or full-time work? ; and do students need to work to meet these costs?

Secondly, participation in work creates difficulties for students – particularly in juggling and balancing commitments. Does this lead to poorer study outcomes? The study indicates that full-time students who do not work are also those best integrated into their institutions, but does not provide any indications of the effects that employment might have on study results. Does the time and effort that students devote to employment detract from their study? Would students' results improve if they were able to spend less time in employment?

The results suggest that education policy makers and institutions may need to consider if the impact of fees and other study-related costs need be reduced, so that the pressure on students to work is also reduced? And if so, how?

10. EQUITY IN THE LEARNING SOCIETY: RETHINKING EQUITY STRATEGIES FOR POST-COMPULSORY EDUCATION AND TRAINING

Louise Watson, Peter Kearns, John Grant, Barry Cameron

URL: www.ncver.edu.au/publications/512.html

Commissioning body: NCVER

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Place: Adelaide

Aims

The broad aim of this research was to contribute to the discussion of cross-sectoral policy issues in post-compulsory education and training. More specifically, the project aimed to:

- review equity and access policies in schools, vocational education and training, higher education and adult community education to determine similarities and differences between the sectors
- compare patterns of participation for disadvantaged groups in each sector and the extent to which structural factors impact on them
- identify any new social and economic barriers to participation and their likely impact on achieving equality of educational outcomes
- examine the feasibility of developing access and equity policies that would transcend sectoral boundaries
- explore whether a new definition of equity was necessary in the context of lifelong learning

Methodology

The research briefly reviews some of the literature defining equity. It examines ‘key recent reports’ in each education sector to determine the ‘state of play’ and data on access, participation and outcomes for each sector and equity group (as available). It discusses the case for rethinking equity objectives and strategies on the basis of cross-sectoral collaboration at the local level (ie ‘local partnerships’), drawing on ‘international developments’.

Main Findings

There are more similarities than differences in the equity policies for each sector. Government equity strategies could be improved by:

- targeting low socio-economic status (SES) students within all equity groups
- identifying two new target groups: those with low skills and the long-term unemployed
- reporting performance in a way that focuses on the outcomes (in addition to the outputs) of education and training
- strengthening pathways to employment from education and training

Participation by disadvantaged groups is higher in sectors where education and training provision is more decentralized but this issue requires further research.

Cross-sectoral comparisons are hindered by a lack of comparability between data and the limitations of the data collections in some sectors. Comparisons of educational outcomes would be easier if each sector’s data collection:

- adopted the same sets of criteria for identifying equity target groups
- reported outcomes for two additional sub-groups: people with low skills and people who are long-term unemployed
- captured the socio-economic status of students by identifying at point of enrolment the highest educational level and occupation of the student’s parents
- published data by the Australian Bureau of Statistics (ABS) labour force region

Performance reporting could be improved by collecting and publishing data in all sectors to the standard set by the vocational education and training sector.

The importance of lifelong learning in a global labour market strengthens the imperative for improving equity outcomes in all sectors of education and training. The growth of the knowledge economy has deepened the polarisation between people who are ‘learning rich’ and able to profit from new employment opportunities and the low-skilled who are increasingly marginal to the labour market and mainstream society. Without a continuing commitment to equity in education and training policy, these new social and economic conditions could erode any improvements in

educational outcomes for disadvantaged social groups. Overall participation in education and training and outcomes for disadvantaged groups have improved on many indicators, but they remain behind those of the total population.

In spite of the similarities between equity policies in the various sectors, current management frameworks preclude the development of equity initiatives across the sectors. The management of the sectors by different agencies and various levels of government creates significant barriers to the development of cross-sectoral policies. However, local partnerships based on models such as 'Learning Cities' could provide a new framework for building cross-sectoral equity initiatives in education and training.

While it is not necessary to redefine equity in the context of lifelong learning, governments may need to develop new approaches to equity policies and programs to ensure that workers are able to participate effectively in the knowledge economy.

General Comments

Much of the research on equity in education is conducted within a sector. The strength of this work is therefore the cross-sectoral approach that it takes. The report is particularly useful in identifying the disparities between the definitions of equity groups across sectors; and in the collection of equity data across sectors.

However the cross-sectoral approach also means that the researchers are limited in the specific attention that they can give to equity within each sector – and thus much of the depth and complexity that is present in single sector research is missing here.

While the research identifies the difficulties in developing cross-sectoral equity initiatives, due to the different structures and management of the various education sectors, it nevertheless presents an optimistic view of partnerships as a means of surmounting these obstacles. Local community learning partnerships have in recent years become a stronger feature of the educational landscape, often with a strong equity focus.

11. HIGHER EDUCATION FINANCING AND STUDENT ACCESS: A REVIEW OF THE LITERATURE

Bruce Chapman and Chris Ryan

URL: www.avcc.edu.au/documents/policies_programs/statements/Chapman_HECS_study_Oct03.pdf

Commissioning body: Australian Vice-Chancellor's Committee (AVCC)

Published: October 2003

Publisher: AVCC

Place: Canberra

Aims

The paper aims to review the evidence of the impact of HECs on access to higher education since its introduction in 1989 and changes from 1997. The paper also makes some predictions about the impact of additional changes to HECS foreshadowed by the government and alternatives proposed by the opposition.

Methodology

The paper briefly discusses the theory and rationale behind the charging of fees for higher education, concluding that a failure to charge a fee would be regressive. The paper then reviews the

literature, dividing the studies for review into three main groups:

- Studies of Aggregate Demand for University Places
- Student Surveys
- Studies of Participation by Disadvantaged Groups

Discussion identifies for each study the sources of data, data collection methods (where applicable), methods of analysis and main findings, with methods and findings compared. The authors identify inconsistencies or inadequacies in data or data collection. They note variations between the studies including: a focus on applications to higher education or participation in higher education; and the student groups studied e.g. all students or particular groups.

The authors then turn to proposed changes to HECS and address the questions: what are the true financial costs to students of the new HECS parameters compared to current arrangements; and how do these costs vary for students with the expectation of different lifetime labour market experiences?

These questions are examined using a number of different scenarios:

- A male expecting to work full-time and earn the average income by age of full-time male graduates [referred to as “Average Males”].
- A male expecting to work full-time and earn an income by age, which is 15 per cent lower than the income of average male graduates [“Poor Males”].
- A male expecting to work full-time and earn an income by age, which is 100 per cent higher than the income of average male graduates [“Very Rich Males”].
- A female expecting to work full-time and earn the average income by age of full-time female graduates [“Average Females”].
- A female expecting to work full-time and earn the average income by age, which is 15 per cent lower than the income of average female graduates [“Poor Females”].
- A female expecting to work full-time and earn an income by age, which is 100 per cent higher than the income of average female graduates [“Very Rich Females”].
- A female expecting to work full-time and earn the average income by age of full-time female graduates until the age of 25, after which she leaves the labour force until age 28. At the age of 28 she re-enters the labour force and works part-time earning \$28,000 per annum until the age of 33 when she then works full-time earning the average income by age of the average full-time female graduate [“Females Out”].

Finally the authors briefly examine some alternative proposals for higher education funding put forward by the main political party in opposition to the government, using the scenarios outlined above.

Main Findings

The authors argue that the studies examining the impact of HECS lead to the following main conclusions about access to higher education and the socio-economic mix:

- The relatively disadvantaged in Australia were less likely to attend university even when there were no student fees. This provides support for the view that a no-charge public university system is regressive.
- The introduction of HECS was associated with aggregate increases in higher education enrolments.
- HECS did not result in decreases in the participation of prospective students from relatively poor families, although the absolute increases were higher for relatively advantaged students, especially in the middle of the wealth distribution.

- There was a small decrease in the aggregate number of applications after the 1997 changes, but no apparent decreases in commencements of members of low socioeconomic groups, except perhaps for a small number of males with respect to courses with the highest charges.

In looking at the likely impact of proposed changes to HECS the authors find that variations in the work experience and incomes of graduates will lead to diversity in the 'true financial effect', including by gender:

For a variety of labour market outcomes for male graduates expecting to work full-time, an increase in the HECS charge results in a true financial increase which is very close to what the apparent charge implies.

For relatively poor women graduates working full-time, and those in and out of the labour force (working part-time for a few years) - the arrangements will deliver important financial benefits if the HECS charge does not increase, of around 15 per cent of the present value of HECS and members of this group will generally not be worse off even with a 30 per cent nominal increase in the HECS charge. (p 16)

In relation to the impact of the introduction of FEE-HELP under which HECS-type loans will be made available to full-fee paying undergraduate domestic and post-graduate courses, with repayments to be made according to HECS-HELP parameters the authors find that:

An apparent charge of \$48,000 has very different true costs for students, from around \$45,000 for Very Rich Males, to less than half of this for Poor Females. ... For a given level of charge, the richest graduates pay the most in absolute terms, but the least compared with their lifetime incomes (p 18)

Overall the authors indicate that the proposed changes are unlikely to have an impact on the socio-economic mix in higher education.

General Comments

The paper was commissioned by the AVCC in response to work suggesting that changes in HECS were impacting on particular groups of students. It is a very useful and competent review of studies on the impact of HECS and fees on access and participation in higher education.

While the paper acknowledges that the 1997 HECS changes did have some impact on certain groups (some males from low socio-economic groups changed to less expensive courses and there was a decline in applications for entry by mature age people) it appears to discount these within its overall conclusions and projections.

The focus of the work is the impact of HECS and fees on applications for higher education and on participation. The work thus does not consider other forms of impact, such as a possible link to the increasing proportion of students who combine study with full-time and part-time work.

12. WHY UNIVERSITY? A CASE OF SOCIO-CULTURAL REPRODUCTION IN DISADVANTAGED SECONDARY SCHOOLS

Deborah Tranter

URL: <http://www.aare.edu.au/03pap/tra03142.pdf>

Published: 2003

Conference paper

Aims

The paper reports on ongoing work towards the author's doctoral thesis on the influence of school culture on the higher education aspirations of secondary students in one of the most educationally disadvantaged regions in Australia.

Methodology

The author adopted a case study approach to investigate the attitudes towards higher education of students from three schools in this area, with a particular focus on how and why these students make personal decisions about higher education. She is conducting observations at the schools, analysing documents and statistics and undertaking a series of semi-structured interviews with staff and students (students in year 12 and in year 10). She has also interviewed a small number of students who enrolled at the University of South Australia from each of the case study schools.

In analyzing how the culture of the schools shapes students' aspirations and contributes to their eventual post-school destinations Tranter is drawing on Bourdieu's theory of reproduction in education and the concepts of field, capital and *habitus*. Tranter notes that these 'offer an explanation of the ways in which the environments in which people are raised, their conditions of cultural and material existence, shape their attitudes, their means of interpreting the world, and their capacities to engage with academic discourse' (p 1).

Main Findings

The work is ongoing and thus the paper highlights some themes that are emerging as it continues:

- To the vast majority of students at these schools, university is an alien and inaccessible concept. Special entry schemes have little impact on attitudes and aspirations.
- The schools have individual institutional characteristics that affect the attitudes and behaviours of their students.
- Few people in the communities have attended university. The *habitus* of the community is not shaped by this experience and, if anything, is antithetical to it.
- In most cases teachers are among the only people school students meet who have any experience of higher education, thus the role of teachers in encouraging, or discouraging, students is crucial.
- Students often make inappropriate subject choices and can be guided to inappropriate choices by their schools.
- The most important factor in achieving a place at university, and persisting there, seems to be a very high level of inner motivation.

General Comments

This paper highlights the importance of aspirations and motivation in enabling young people from disadvantaged backgrounds to enter university. It highlights that in order to succeed, these students must be more strongly motivated than their peers from more privileged backgrounds, for whom university is a more common natural progression from Year 12.

The paper says little directly about financial reasons for failure to transfer to university, it nevertheless provides considerable contextual material that helps to explain why and how financial issues impact on decisions about entry to higher education.

It underscores that policy interventions that focus on financial considerations alone will have very little impact on decisions to enter higher education as the factors that affect decision-making are considerable and complex.



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