



Exploring the impact of Principal Fellowship on individuals and institutions

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Executive summary

Principal Fellowship (PF) is awarded to professionals who demonstrate they meet Descriptor 4 of the UK Professional Standards Framework (UKPSF) and was originally launched by the Higher Education Academy (HEA, now Advance HE) in April 2012. To be successful, applicants must evidence a “sustained record of effective strategic leadership in academic practice and academic development as a key contribution to high quality student learning” (Advance HE, 2021). As of 1 November 2021 there were 1473 Principal Fellows globally. Despite an expanding evidence base that has explored the impact of HEA Fellowships aligned to the UKPSF, there is currently no published literature focusing explicitly on the impact of Principal Fellowships on the individual or on the enhancement of teaching and learning. Advance HE sponsored the University of Plymouth to conduct research with Principal Fellows (PFs) globally to assess the impact of their award on their role(s), individual identity and career, as well as the impact on the institutional enhancement of teaching and learning. This research took place between August 2021 and December 2021.

This report details the research methods and findings from the research strategy’s two strands of activity:

- + **Work Package 1:** an online survey to explore perceived impacts of gaining Principal Fellowship. This was disseminated to Principal Fellows via Advance HE, using its global email distribution list
- + **Work Package 2:** 12 semi-structured qualitative interviews to examine in greater detail the impact of Principal Fellowships on individuals, institutions and the sector.

Key findings

In total, the survey generated 304 responses, representing 22.94% of the total number of emails sent (n=1325) and 24.58% of those we know received the information (n=1237). 87.17% of those responding had achieved PF on their first attempt. The primary motivations underpinning an application for PF were: 1) to critically reflect on practice; 2) to raise their profile as a leader of teaching and learning within their institution; 3) to enhance their profile beyond their institution; and 4) to encourage the recording of successes.

45.72% reported that they felt PF had assisted their careers, with 26.97% reporting they thought it had not, and 27.30% unsure. Differences emerged between job roles with professional services staff noting less impact. 74.42% of respondents agreed or strongly agreed that being awarded PF increased their confidence as a strategic leader of teaching and/or student learning. Qualitative comments revealed increases in self-belief, confidence and achievements, as well as a feeling of pride. The reflective process (whether via the written or dialogic route) provided applicants with the opportunity to think deeply about their practice (77.08%) and in both the survey and interview data respondents relayed how powerful this process could be. The narrative crafted during the process of applying for PF was often repurposed for other uses, such as for promotion applications, thus extending the impact further. While the reflective process was deemed to be worthwhile and meaningful, a key challenge in relation to obtaining PF was the reflective writing style. This finding underscores the significance of a mentor/critical friend to guide the process.

When asked whether being a PF created new opportunities within their institution, only 28.04% agreed or strongly agreed, with many questioning the extent to which it mattered to senior leaders. This was reflected in the lack of reward or recognition experienced across the dataset. Since raising the status of the applicant's profile as a leader of teaching and learning was a key motivation for applying (78.55% of respondents), there is a significant disconnect here. The qualitative commentary from the survey and the interview data aligned, revealing considerable frustrations that PFs were not used more strategically by institutions, or, in some cases, were not drawn on at all. Related to this, 67.44% reported that PF was not aligned to institutional promotions criteria.

There was agreement across the survey and interview data that PFs could gain most traction beyond their institution, with 64.31% of survey respondents noting greater impact outside their institution. They reported how gaining PF had increased their credibility and, in some cases, had led to wider range of consultancy activities and scholarship opportunities.

An important finding that emerged from the survey data was the length of time it appears to take to develop institutional and sector-wide impacts. According to our data, being asked to provide expertise as a mentor or assessor, and to lead teaching and learning initiatives, is more likely to happen after three years post-PF. Similarly, doors seem to open up beyond the institution after three years.

Conclusion and recommendations

This research has found that the impact of Principal Fellowship on the individual, in terms of enhancing self-confidence and a sense of pride, is clear. Developing a case for PF also assisted with career development for almost half our survey respondents. Evidence of the impacts of gaining PF on the institutional enhancement of teaching and learning was unclear. Interviewees and survey respondents noted that, where they were engaged by their institutions as a result of gaining PF, it was typically to perform a mentoring or assessment role in relation to institutional CPD schemes. There was significant frustration expressed that institutions did not value or understand the award of PF. It was beyond the institution where the impact of PF was greater, with respondents gaining access to more professional networking opportunities and reporting an increase in external credibility leading to a wider range of opportunities, such as consultancy and external examining positions.

Based on this research, there are several areas that Advance HE, individuals and senior institutional leaders could consider to realise the most benefit from the award of Principal Fellowship.

- + Advance HE could work with the Expert Advisory Group (EAG) for Fellowships and Accreditation to develop guidance for accredited institutions, focused specifically on how senior leaders within institutions might engage with PFs to initiate and drive institutional teaching and learning agendas.
- + By providing follow-up professional development opportunities, Advance HE could support individuals, once they become PFs, to further develop their own teaching and learning profiles within and beyond HE institutions, and to consider how to better position themselves in driving strategic teaching and learning agendas.

- + Regional networks were noted as being valuable spaces for PFs to share ideas and develop wider networks. By their very nature, they are also communities of practice with considerable expertise and experience in teaching and learning matters. Advance HE might wish to consider how these networks might be better leveraged to support the strategic enhancement of teaching and learning.
- + A key challenge in developing the application was in relation to gathering the substantial evidence base required to demonstrate impact. Performance development review (PDR) processes within HE institutions could usefully embed aspects of 'demonstrating impact in teaching and learning' at an early stage in academics' careers so that staff are supported to demonstrate impact systematically.
- + While there are a small number of dialogic routes to achieving PF via CPD schemes, currently those applying via the direct route must produce a written application. Advance HE, in consultation with accredited programme leaders, should continue to consider the development of alternative and more inclusive pathways to achieving PF, particularly given the increasing uptake of the award beyond the UK.
- + To gain a more comprehensive picture of how PF is situated within the sector, further research should be encouraged to add to this emerging body of literature.

List of acronyms

AHE	Advance HE
APL	Accredited programme leader
CPD	Continuing professional development
DVC	Deputy vice-chancellor
EAG	Expert Advisory Group
GDPR	General Data Protection Regulation
HE	Higher education
HEA	Higher Education Academy
HEI	Higher education institution
Jisc	Joint Information Systems Committee
KPI	Key performance indicator
NTF	National Teaching Fellow
PDR	Professional development review
PF	Principal Fellow
PREI	Principal Fellowship Record of Educational Impact
PVC	Pro-vice-chancellor
SEDA	Staff and Educational Development Association
SF	Senior Fellow
T&L	Teaching and learning
TEF	Teaching Excellence Framework
UK	United Kingdom
UKPSF	UK Professional Standards Framework for Teaching and Supporting Learning (2011)
UoP	University of Plymouth

1 Project team

Principal investigator: Dr Lucy Spowart (LS) is Associate Professor, National Teaching Fellow (NTF), Principal Fellow and Programme Lead, Clinical Education in the Peninsula Medical School, University of Plymouth. Lucy has expertise specifically in CPD, teaching recognition and assessing the evaluation of impact (eg Spowart et al, 2020; Spowart et al, 2019). She has also led and chaired institutional recognition panels awarding Principal Fellowships since 2012.

Co-applicant: Dr Rebecca Turner (RT) is an experienced researcher and member of University of Plymouth's Educational Development team. Rebecca's research addresses themes including professional development, reward and recognition and scholarly practice. Rebecca has also led institutional-level evaluation work at the University of Plymouth, is an executive member of SEDA and is the current Chair of SEDA's Papers Committee. Rebecca obtained her Principal Fellowship in 2019.

Quantitative analyst: Dr Daniel Zahra is a Lecturer in Assessment Psychometrics, Chartered Psychologist (British Psychological Society), and registered data analyst (Royal Statistical Society). Daniel manages a team of psychometricians who handle Plymouth Peninsula Medical and Dental Schools' assessment data.

Research fellow: Dr Mariam Vahdaninia is a qualified mixed method researcher and is based in Plymouth Peninsula Medical School, CAMERA research team. She has extensive background in conducting research in academic settings.

Project partner: Dr Harriet Dunbar-Morris (HDM), PFHEA, NTF is Dean of Learning and Teaching and Reader in Higher Education at the University of Portsmouth. Harriet has taught on the university's Academic Professional Apprenticeship course and pre-session programme and supervises students on the university's Professional Doctorate in Education. She is also an organiser of the South West Principal Fellows' Network and co-chair of the Aspiring Principal Fellow network on the Advance HE Connect Platform.

Project partner: Dr Rachael Carkett (RC) is an Independent HE Consultant and NTF. Rachael has been involved with Advance HE and SEDA accreditation and recognition for more than 15 years. A UKPSF consultant for more than seven years, she is well networked with HEIs from across the UK as well as internationally. Rachael was one of the founder members of the South West Principal Fellows' Network and the associated Advance HE Connect group. Rachael obtained her PF in 2014.

Critical friend: Dr Clare Power, PFHEA, is Director of the Pathways to HEA Fellowship Scheme within the Centre for Learning and Teaching at the University of Bath. Clare has worked in educational development since participating in the original UKPSF sector consultation in 2004. She developed and led the Bath Spa University CPD Scheme, working closely with Advance HE and SEDA on academic professional development and recognition. She is member of SEDA Executive Committee and Services and Enterprise sub-committee co-chair.

2 Introduction to the project

Advance HE sponsored the University of Plymouth (UoP) to conduct research with Principal Fellows (PFs) globally to assess the impact of the award on individual identities and careers, as well as the impact on the institutional enhancement of teaching and learning. This research took place between August 2021 and December 2021.

There is a growing body of research that has explored the impact of HEA Fellowships aligned to the UK Professional Standards Framework (UKPSF) on the individual (Botham, 2018; Cathcart et al, 2021; Smart et al, 2019; Spowart et al, 2016). This research confirms that Fellowships afford numerous benefits to the successful recipient, including recognition for their contribution to teaching and promoting student learning; and professional development through engagement with reflective practice and scholarly literature (Botham, 2018; Shaw, 2018; Spowart et al, 2019). Recent research has also identified the positive impact of institutional accreditation in raising the profile of teaching and learning within institutions, encouraging collaborative activities, underpinning career progression for education-focused staff, and enhancing teaching and learning practices (Spowart et al, 2020). Some studies (for example, Spowart et al, 2016; Spowart et al, 2019) have also included the voices of small numbers of PFs within their research sample.

Despite this expanding evidence base, there is currently no published literature which focuses explicitly on the impact of PFs on the enhancement of teaching and learning within institutions (and beyond). Nor are there any published studies that have considered the impact on the individual in terms of their career development opportunities. In fact, aside from individual blog posts (see, for example, Advance HE, 2021; Dunbar-Morris, 2019), and despite their perceived status as strategic leaders of teaching and learning, we currently know very little about the sector-wide impact of this select group of individuals.

Principal Fellowship is awarded to professionals who demonstrate they meet Descriptor 4 of the UKPSF and was originally launched in April 2012. To be successful, applicants must evidence a “sustained record of effective strategic leadership in academic practice and academic development as a key contribution to high quality student learning” (Advance HE, 2021). As of 1 November 2021 there were 1473 PFs globally, representing just under 1% of all HEA Fellowships awarded. Given the escalating focus globally to professionalise teaching and learning (Shaw, 2018), the dearth of research into the impact of PFs is perhaps surprising. These individuals are potentially best placed to leverage cross-institutional support and drive the constantly evolving and diverse teaching and learning agenda in times of rapid change.

Conversations among the project team and anecdotal accounts of the varied ways PFs work also highlight the potentially unique ‘space’ PFs can occupy. Though many PFs are in roles within their institutions that are commensurate with Descriptor 4, not all PFs hold formal leadership roles. Some have developed innovative or creative ways to achieve the strategic level impact associated with the practice of being a PF. This could be from the ‘bottom-up’, rather than a ‘top-down’ approach. Gaining knowledge of the different places, spaces and roles PFs occupy, and how they undertake their work, could provide valuable insights to supporting institutions to respond to current agendas such as ‘de-colonising the curriculum’ and ‘embedding sustainability’. To drive institutional change in

these areas requires strong, collaborative and visionary strategic leadership. We speculated that PFs might be called on to undertake such work. In fact, for many successful PFs their submissions for the recognition against Descriptor 4 may well have included examples of the strategic impact of their leadership activities. Equally, we prioritised gaining insights into where institutions may not strategically and deliberately engage with PFs, as that is a discussion we are also aware of from our networks. Gaining a contemporary and nuanced understanding about the impact of being awarded PF status is therefore vital in working with both individuals and institutions to ensure that PFs are appropriately positioned and supported to act as teaching and learning change agents.

3 Purpose and scope of the project

The project aimed to explore the impact of Principal Fellowships on the individual and the institutional enhancement of teaching and learning

Project objectives:

- + To establish the extent to which becoming a PF impacts on the individual in terms of their:
 - a) role(s)
 - b) identity/identities
 - c) career development
- + To establish the extent to which PFs are:
 - a) supported, recognised and rewarded within their institutions
 - b) used to develop and support institutional strategies on teaching and learning
 - c) involved in mentoring others to become strategic leaders
- + To establish how PFs are drawn on by institutions to enhance teaching and learning across an institution.

The project was divided into two work packages aligned to the above objectives, giving careful consideration to the project's required timeframe.

- + Work Package 1: an online survey of all individuals awarded PF aimed at gathering data relating to perceived and actual impact of becoming a PF
- + Work Package 2: 12 in-depth semi-structured interviews with professionals who have been awarded PF were undertaken to gain further insight into the impact of gaining PF recognition, both on the individual and the institution.

3.1 Ethical approval

Ethical approval was granted by Advance HE's research ethics committee on 16 August 2021. All data was stored securely and anonymously using UoP guidelines on data handling.

4 Survey of Principal Fellows

4.1 Introduction

To gain the views of PFs on their experiences of applying for recognition, their motivations and the resulting impacts, an online survey was developed. Online surveys are an efficient and cost-effective way of accessing dispersed sample populations (Bryman, 2015). Indeed, recent work has demonstrated the success of online surveys in providing rapid and easy access to the HE community through an international study to assess the impact of Advance HE's accreditation services (Spowart et al, 2020). Our use of online surveys in that work provided what Braun et al (2020) referred to as the "wide-angle lens on a topic of interest" in that the online survey captured a range of perspectives and experiences. Following on from this they also recognised the value of online surveys in capturing 'un-heard' or underrepresented voices in qualitative research (Braun et al, 2020). Recognition of the potential of online surveys to capture a range of voices and perspectives, as well as the exploratory nature of this work, allayed some of the concerns raised by critics of online surveys around areas such as respondent bias (Nulty, 2008).

4.2 Development of the survey instrument

Four project team members (LS, RT, HDM and RC) hold PF status and we drew on our own experiences to initiate the draft question areas for the survey. Since we each hold diverse roles (see details under Project Team), and two had applied via the direct route while two had applied via an institutional CPD scheme, this proved a useful starting point. However, we openly acknowledge our position in this research as four white female, UK-based PFs. To seek wider perspectives, the survey instrument then underwent a rigorous development procedure, with design feedback solicited from key stakeholders including all members of the wider project team and Advance HE. Before the final pilot, the survey was converted into a digital format using the Jisc online questionnaire platform, which was also used for the final survey. This is compliant with GDPR and allowed us to capture both quantitative and qualitative anonymised data through the use of closed survey questions/short answer and open responses.

The draft survey was then piloted with six teaching and learning 'experts' not connected in any way to this project. Five were PFs and one was a Senior Fellow and accredited CPD scheme leader who was preparing to apply for PF (four individuals were from within the UK and two from outside to reflect the international scope of the project). Overall, the survey instrument went through three cycles of revision, with feedback carefully considered and addressed in each iteration.

Ensuring relevance to the diversity of individuals in our target group (eg some retired, some working outside of HE institutions and some working within) had implications for the length of the questionnaire. The [final survey](#) instrument comprised 22 questions (some with multiple components). To minimise completion time and maximise response rates, both tick-box, Likert-scale and semi-structured qualitative questions were included. This allowed us to capture both quantitative and qualitative data through closed questions and short answer open responses.

The survey's four key sections were:

- 1 Motivation and support when applying for Principal Fellowship.
- 2 Individual impacts from gaining Principal Fellowship.
- 3 Institutional impacts from gaining Principal Fellowship.
- 4 Sector-wide impacts from gaining Principal Fellowship.

4.3 Dissemination of the survey

Due to GDPR the survey was disseminated directly to successful PFs via Advance HE using its email distribution list. At the time the survey was opened (15 September 2021) there were 1473 PFs globally. Of these, 1325 (92.21%) were emailed as 112 PFs did not include any email address in their record with Advance HE.

Of the 1325 emails sent, 88 emails were 'undeliverable' due to a combination of invalid email addresses/retirement/sabbatical/moved institution auto responses. This resulted in 1237 emails being successfully sent and received (reaching 86.08% of current PFs). To boost response rates supplementary dissemination also took place using regional PF networks via Advance HE Connect.

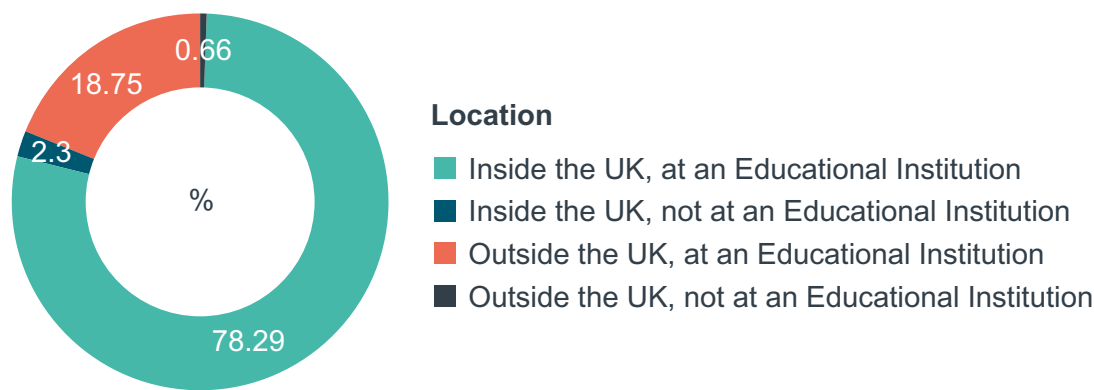
4.4 Analysis of the survey data

In total, 304 responses to the PF survey were received, equating to a response rate of 22.94% of the total number of emails sent (n=1325) and 24.58% of those we know received the information (n=1237). All responses were complete and included in the analysis. Descriptive analysis was undertaken on the closed, quantitative data, and thematic analysis on the open, qualitative responses (Bryman, 2015).

Location at the time of PF award

The vast majority of survey respondents (78.29%) were primarily located at institutions within the UK when they obtained their Principal Fellowship (Figure 1). This largely reflects the distribution of PFs within the sector, with most being UK-based. At the time of the survey, Advance HE informed us that 15.20% PFs self-reported being based outside the UK.

Figure 1: Location at the time of the award of PF



Number of attempts to achieve PF status

Our survey sample indicated that 87.17% of respondents had achieved PF the first time they applied (across all routes to application). This is significantly higher than the success rates across the sector for both direct applications to Advance HE and applications via institutional CPD Schemes and should be taken into account when reviewing the report (Table 1).

Table 1: Comparison of numbers of applications and first-attempt success rates by application route between the current sample and Advance HE

	Direct Applications			Accredited Provision		
	Current Sample	Advance HE (2020-21)	Advance HE (2019-20)	Current Sample	Advance HE (2020-21)	Advance HE (2019-20)
Number of applications	169	128	112	132	–	100
First attempt success %	86.83	52.30	50.90	87.50	–	52.00

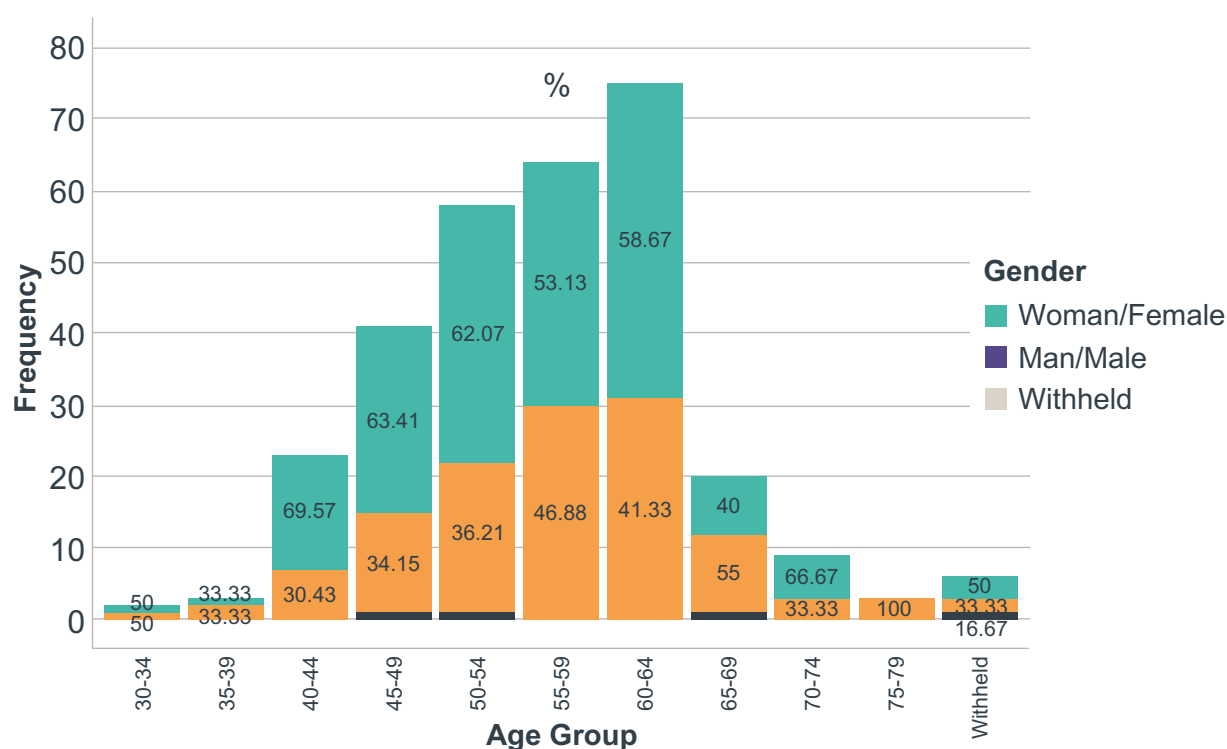
NB One respondent couldn't remember, and one indicated they were unsuccessful through their institution and subsequently applied directly. Another respondent noted that, as one of the first 12 PFHEAs that had previously held Senior Fellowship (under the former recognition framework), they had been 'upgraded' by the HEA in recognition that they had already evidenced the criteria.

We might speculate that those who achieve recognition first time are likely to be more positive about their experience of going through the application process having understood the criteria, appropriately prepared for the application (whether dialogic or written), and having accrued the necessary evidence with which to demonstrate sustained impact. The findings of this study should therefore be considered in relation to this particular sample and is recognised as a limitation of the study.

Gender and age

Proportionally more respondents identified as Woman/Female ($n=175$, 57.57%) than Man/Male ($n=125$, 41.12%), and the modal age group represented within the Woman/Female and Man/Male categories as well as overall were those aged 60-64 years. Very few participants were under the age of 40, which may reflect the senior and influential nature of Principal Fellowship, and the requirement of successful applicants to provide evidence of a *sustained* and effective record of strategic impact in teaching and learning. However, opportunities to meet this requirement may be dependent on affordances of the role and scope of the remit. Figure 2 summarises the respondent profile by gender and age group. There was no association between gender and age group, suggesting comparable age profiles within each gender category ($\chi^2(df=20, n=304)=26.39, p=0.154$).

Figure 2: Respondent profile by age group and gender



Gender, route to application and success

Excluding the four respondents who withheld their gender, there is no association between respondent gender and their route to application, with comparable proportions of Women/Females and Men/Males applying through their institutions (42.29 vs. 43.20%) and directly (56.00 vs. 53.60%; $\chi^2(df=3, n=304)=1.66, p=0.645$).

Likewise, there is no association between gender and the application attempt on which PF was awarded ($\chi^2(df=3, n=304)=4.66, p=0.199$); 90.29% of Women/Female applicants were successful on their first attempt, as were 82.40% of applications from Men/Males.

Position

Overall, 50.66% of applicants held a senior leadership position at the time they achieved PF, with a further 20.53% of respondents identifying their role as a 'traditional academic', with a balance of research and teaching. Figure 3 shows the number of respondents working in each position, the relative proportion of all respondents, and by broad category of position.

Figure 3: Role at the time of the award of PF



Between being awarded PF and the time of the survey, 72.89% of those respondents still working (ie not reporting having retired) had changed roles but most had remained within their institutions (73.03%). 6.83% had retired, and 7.38% had taken on some form of external consultancy role.

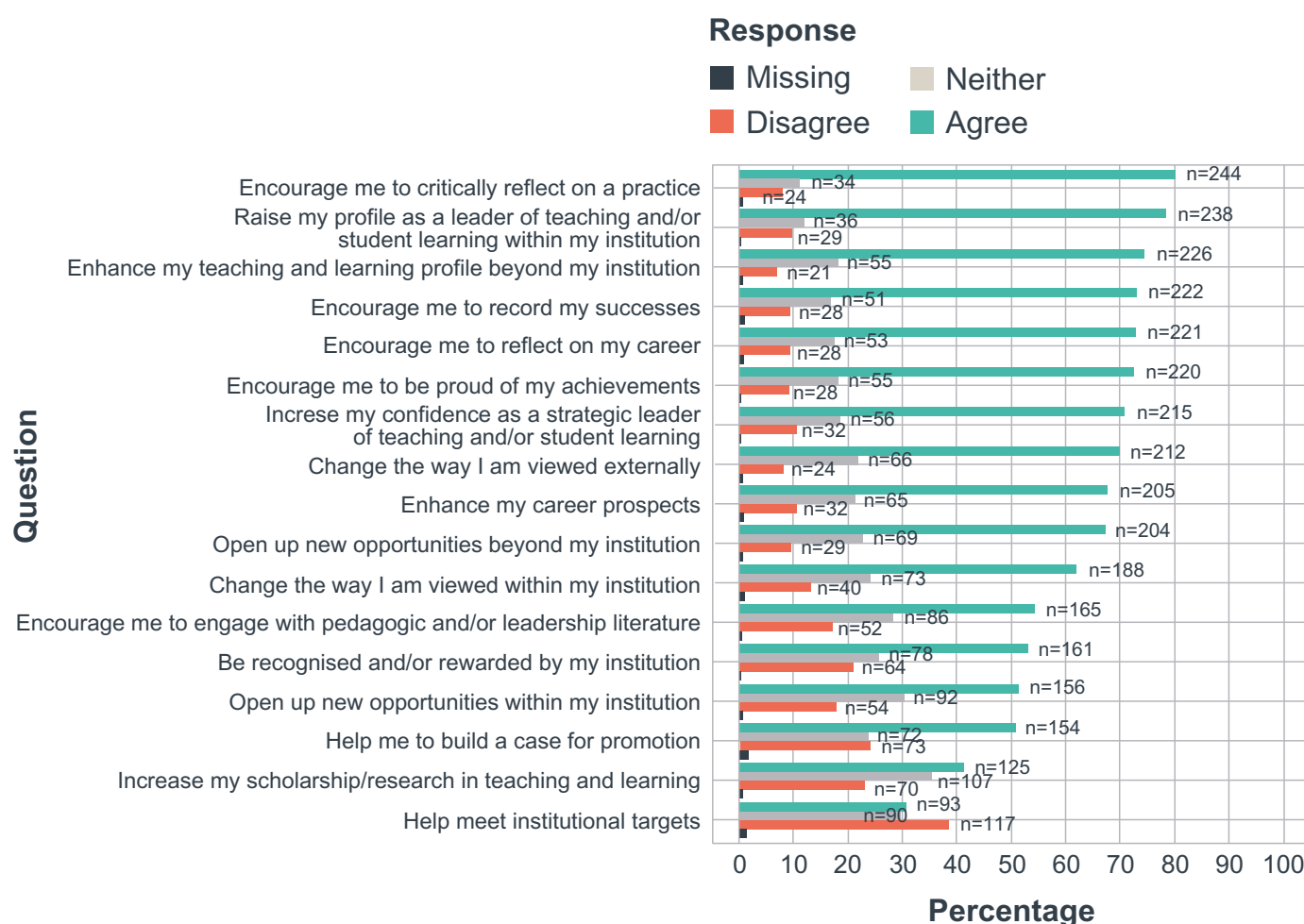
Motivation for seeking Principal Fellowship

To better understand the reasons underpinning an application for PF, respondents were asked to what extent they agreed or disagreed with 19 statements relating to potential motivations for developing and submitting an application. The statements arose from the project team's own personal and professional experiences (17) and were then supplemented with two additional statements suggested by the survey pilot group. Responses are displayed in Table 2 and graphically in Figure 4.

Table 2: Motivations underpinning an application for PF. In descending order of agreement.

Question	Responses; n (%)			
	Missing	Disagree	Neither	Agree
Encourage me to critically reflect on my practice	2 (0.66)	24 (7.9)	34 (11.19)	244 (80.27)
Raise my profile as a leader of teaching and/or student learning within my institution	1 (0.33)	29 (9.54)	36 (11.85)	238 (78.29)
Enhance my teaching and learning profile beyond my institution	2 (0.66)	21 (6.91)	55 (18.1)	226 (74.35)
Encourage me to record my successes	3 (0.99)	28 (9.22)	51 (16.78)	222 (73.03)
Encourage me to reflect on my career	2 (0.66)	28 (9.22)	53 (17.44)	221 (72.7)
Encourage me to be proud of my achievements	1 (0.33)	28 (9.22)	55 (18.1)	220 (72.37)
Increase my confidence as a strategic leader of teaching and/or student learning	1 (0.33)	32 (10.53)	56 (18.43)	215 (70.73)
Change the way I am viewed externally	2 (0.66)	24 (7.9)	66 (21.72)	212 (69.74)
Enhance my career prospects	2 (0.66)	32 (10.53)	65 (21.39)	205 (67.44)
Open up new opportunities beyond my institution	2 (0.66)	29 (9.54)	69 (22.7)	204 (67.11)
Change the way I am viewed within my institution	3 (0.99)	40 (13.16)	73 (24.02)	188 (61.85)
Encourage me to engage with pedagogic and/or leadership literature	1 (0.33)	52 (17.11)	86 (28.29)	165 (54.28)
Be recognised and/or rewarded by my institution	1 (0.33)	64 (21.06)	78 (25.66)	161 (52.97)
Open up new opportunities within my institution	2 (0.66)	54 (17.77)	92 (30.27)	156 (51.32)
Help me to build a case for promotion	5 (1.65)	73 (24.02)	72 (23.69)	154 (50.66)
Increase my scholarship/research in teaching and learning	2 (0.66)	70 (23.03)	107 (35.2)	125 (41.12)
Help meet institutional targets	4 (1.32)	117 (38.49)	90 (29.61)	93 (30.6)

Figure 4: Motivations underpinning an application for PF



There was also the option to provide an open text response to identify another motivation behind applying for PF. Forty-nine qualitative responses were received, most of which provided a further explanation of the responses provided to the above questions. Additional motivations were cited as:

- + securing academic credibility/respect/legitimacy/validation of practice (n=7)
- + to role model engagement with Advance HE (n=7)
- + raising the profile of HEA accreditation (n=3)
- + to help mentor/support others (n=3)
- + to increase the capacity of an institutional CPD scheme (n=3)
- + to demonstrate success when they had been discouraged (n=1)
- + to demonstrate 'heavyweight researchers' can also achieve PF (n=1)
- + to maintain role as an Advance HE accreditor (n=1)

- + to be part of a wider network of leaders in HE practice (n=1)
- + enjoyed the process of working towards SFHEA and so decided to continue (n=1)
- + re-using material from an unsuccessful NTF application (n=1).

Excluding the 'Other' category of position (those with external or 'other' positions), there is no association between respondents' job role and their agreement with the statement 'I was motivated to apply for Principal Fellowship because I believed it would... be recognised and/or rewarded by my institution' ($\chi^2(df=8, n=289)=11.66, p=0.167$). This is also the case when comparing agreement with that statement by individual positions (the eight columns comprising academic, professional services, and senior leaders in Figure 3). However, there is some indication of less agreement from those in senior leadership roles, and more agreement from those in teaching-focused and traditional academic roles (See Table 3; $\chi^2(df=28, n=289)=39.98, p=0.066$).

Table 3: Motivation by recognition or reward by position

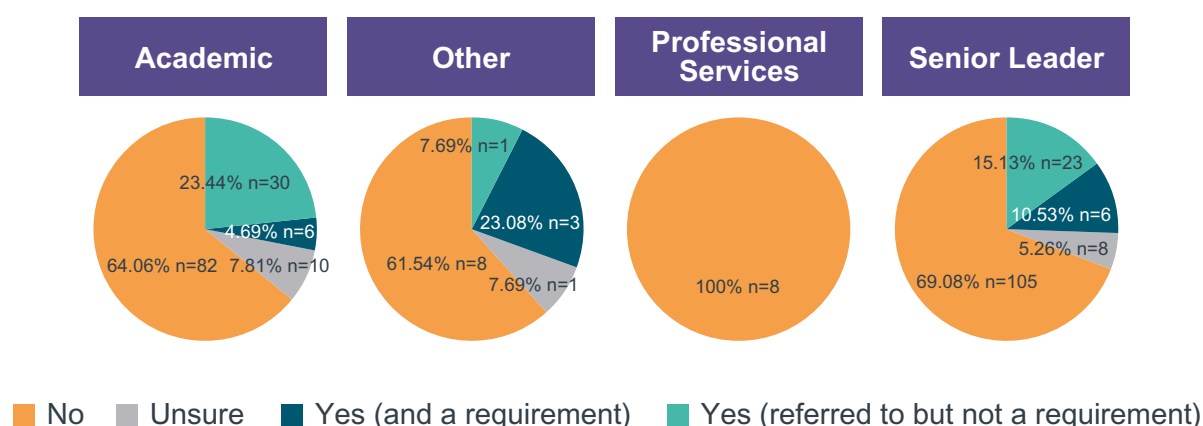
Position	'Motivated to apply [to be] recognised and/or rewarded by my institution'; n (%)				
	Strongly Agree	Agree	Neither	Disagree	Strongly Disagree
Academic/educational developer	8 (28.57)	11 (39.29)	4 (14.29)	5 (17.86)	0 (0.00)
Research-focused academic	1 (20.00)	3 (60.00)	0 (0.00)	0 (0.00)	1 (20.00)
Teaching-focused academic	11 (33.33)	14 (42.42)	3 (9.09)	3 (9.09)	2 (6.06)
Traditional academic	13 (20.97)	12 (19.35)	22 (35.48)	8 (12.90)	7 (11.29)
Professional services staff	3 (37.50)	1 (12.50)	1 (12.50)	1 (12.50)	2 (25.00)
Senior leader (academic)	22 (20.18)	32 (29.36)	30 (27.52)	19 (17.43)	6 (5.5)
Senior leader (central university management)	5 (15.63)	12 (37.50)	11 (34.38)	4 (12.50)	0 (0.00)
Senior leader (professional services)	2 (18.18)	5 (45.45)	4 (36.36)	0 (0.00)	0 (0.00)

Alignment of PF to university promotions frameworks

In connection with an individual's motivation to apply for PF and any resulting impact, we investigated whether PF was aligned to promotions processes and criteria at respondents' institutions at the time of their PF applications. Of those who answered (n=301), only 8.31% reported that PF was a requirement of promotion, with a further 17.94% reporting that it was explicitly referred to although not a requirement. Of the remainder, 6.31% percent were unsure if or how PF was aligned to promotion, and 67.44% reported that PF was not aligned to their promotion criteria.

However, alignment of PF to promotion criteria varied by position category (Figure 5). While no respondents in professional services positions felt PF was aligned to their promotion criteria, the proportions of views differed between those in academic and 'other' roles ($\chi^2(df=3, n=143)=11.75, p=0.008$), but were comparable between academic and senior leader roles ($\chi^2(df=3, n=280)=6.51, p=0.089$), and between senior leader and 'other' roles ($\chi^2(df=3, n=167)=5.64, p=0.131$).

Figure 5: Was PF aligned to your promotion criteria? – by respondent position categories



Ninety-five open comments were received in response to this question and collectively reveal the extent of the diversity surrounding academic promotion on teaching routes in the HE sector. Responses ranged from: *“PF is essential for promotion to professor at my institution”* and *“part of the criteria for a chair”*, to five comments reflecting the lack of understanding by institutions about what PF actually stands for. One respondent noted: *“My university really doesn’t appreciate this title they are only interested in fellow or senior fellow grades”* and another wrote: *“I don’t think it’s properly valued”*. Aside from these polarised views, 22 qualitative comments noted that PF was a desirable criterion for promotions, *“as an indicator of esteem and career achievement”* or as an *“Exemplar of Excellence in Student Education”* although not mandated.

The shifting nature of promotions criteria was also reflected with PF frequently under discussion in terms of whether it should be added or removed from university benchmarks. Some senior leaders had clearly used their strategic position to influence promotions processes and, on gaining PF, had *“designed the academic career pathways and added it in”*. Another noted: *“It wasn’t aligned, but I took initiative to align it. No one cared”*. These latter comments highlight the importance of Principal Fellowship and PFs in raising the status of teaching within higher education institutions (HEIs).

Support with the application process

To identify the sources of support drawn on in preparing their PF application, respondents were asked to select one or more from a group of pre-set options identified in Figure 6; note the frequencies are therefore neither exclusive nor cumulative. A follow-up question, *“What if any impact did that support*

have on the outcome of your Principal Fellowship application?” was also asked. Figure 6 shows the perceived impact of each type of support. 80.42% of respondents felt that formative feedback on early drafts had a positive impact on the outcome. Sixty-three qualitative comments provided additional information relating to the nature and impact of formative feedback, which came from a range of sources such as: HEA/AHE mentors; a peer group of colleagues; institutional mentors; and institutional Fellowship Leads. Positive comments varied considerably with some noting the emphasis on “*articulating impact more clearly*” and others noting the positive impact on confidence and self-esteem. There were three negative comments relating to imprecise or “*too oblique feedback*”.

Written guidance on Advance HE’s website was the second most popular aspect of support (72.28%) with support from existing PFs third (65.02%). Being able to see an example of a previously successful PF application was also highly valued (51.07%) although for some respondents who were very early in the history of PFs there may not have been exemplars available to them.

While the Advance HE Fellowship Category Tool was only rated as having a positive impact by 44.94% of respondents, with 53.56% reporting it had ‘Neutral/No Impact’, this was only made available in February 2019 and therefore post-dates the time when many of the respondents were preparing their applications.

Figure 6: Perceived impact of different types of support used during PF application

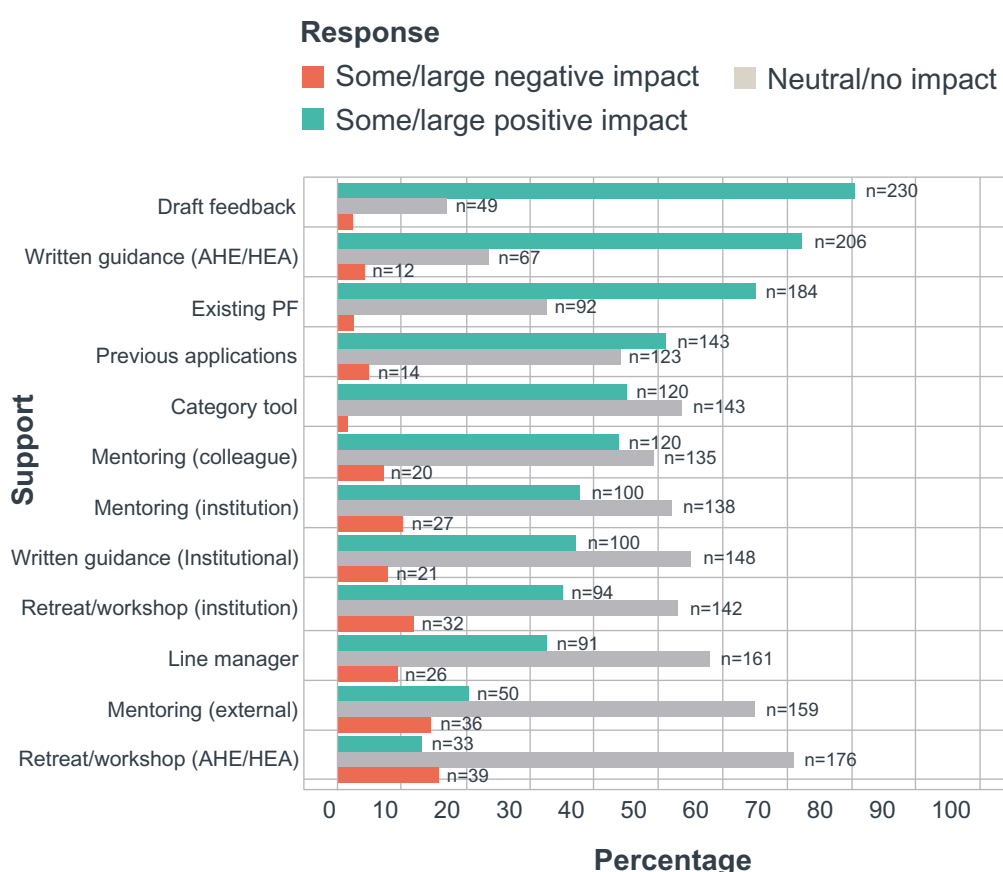


Figure 7 shows the percentage of respondents in each category of position who thought each type of support had 'Some/Large Positive Impact' on their application. While there are some types of support deemed more positively impactful than others by those in different positions, for example, fewer senior leaders and academics found support from line managers positively impactful than did professional services applicants, the perceptions of positive impact from different support types do not differ statistically significantly overall between those in different positions ($\chi^2(df=110, n=1487)=85.99, p=0.956$).

Figure 7: Percentage of respondents in each category of position who thought each type of support has ‘Some/Large Positive Impact’, ordered from highest to lowest average percentage within type of support. NB the ‘Other’ group here, as above, comprises those external to institutions or unspecified.



In the qualitative commentary, some of those that had attended a writing retreat provided by Advance HE/HEA provided additional evidence of impact. The specific support and guidance provided by the lead for Principal Fellowship, Professor Sally Bradley, was mentioned on six separate occasions. For example, one respondent noted:

“I attended a writing retreat run by Sally Bradley. It was superb. Absolutely perfect. Years later I am still drawing upon the enthusiasm it generated and the insights it provided”.

We then asked a more focused question: “What ONE thing would you say was the most important to the success of your application for Principal Fellowship and why?” There were 291 responses to this question, which were coded thematically using Nvivo software. Three key themes emerged as being the most important factors for success. The first was the support provided by another person such as a mentor, scheme manager, critical friend and/or member of Advance HE. Having someone to encourage, motivate and provide critical and carefully constructed feedback was deemed invaluable (n=64), not only in focusing the applicant on the criteria but in providing the momentum to keep going. Asking the question in this way provides a slightly different picture to that presented in Figure 6 since providing feedback on a draft was also frequently the role of a mentor. One participant reflected:

“Mentorship from people who could support my reflection on practice and how I had aligned to the framework. If I had my time again, I would get the framework earlier in my career and build myself using the framework, rather than retrospectively working through how my achievements aligned. As a mentor now, this is what I encourage – working towards fellowship rather than being awarded”.

Many others noted that their mentor was:

“critical for the success of my application. I would not have been successful on the first submission if my mentor had not worked with me”.

The second most popular response was related to the ability to construct a case and to evidence the impact of achievements in teaching and learning (n=53). Within this category participants noted the ability to write concisely and reflectively and to develop a clear narrative thread as the quotes below highlight.

“Being able to identify and describe sustained impact over a period of time. Not something we think about day to day”.

“Allowing myself the opportunity to really think and critically reflect on all the many hats and roles that I was leading on or had been in engaged in. Self-awareness of my personal abilities and my achievements in my role in education”.

The third theme that emerged as being particularly crucial to a successful application for PF was the relevant experience and engagement in teaching and learning gathered over a substantial period of time. One respondent noted:

“It certainly helped to have enough stuff in the old CV, and that works for me but will likely work against more junior applicants (even those with major achievements) – it’s like journal citations: the longer you’re around the more you accrete”.

Key challenges in relation to completing the PF application

Respondents were invited to identify the main challenges they encountered when developing their application, and to explain the reason they highlighted these challenges. In total, 291 responses were received which, following thematic analysis, represented the following areas.

Challenges experienced in writing style was reported by 151 respondents. The issues respondents reported related to the following two areas; the expectation for applicants to adopt a reflective writing style, which for some proved unfamiliar, and/or to write in a style applicants felt was expected of them ie developing a first person narrative when their examples shared were based on collaborative work:

- + *Getting the 'tone' of it right and the degree of self-reflection. I am a science academic and used to writing as objectively as possible using third person passive. Writing from a personal perspective was challenging as not the style I have been trained for.*
- + *The structure of the application. It's not easy to write a coherent narrative with a golden thread that goes through all elements. It's also hard not to repeat things in the different sections, because there is a lot of overlap between the criteria. Although I enjoyed reflecting on my experiences, completing the application and 'filling in the form' was not a pleasant experience.*

Time, which included both finding the time and justifying dedicating the time on the application, was highlighted in 68 responses, for example:

- + *The amount of time to do the application – being prepared to gather evidence/data and construct the case carefully over a period of time.*
- + *Setting aside time to work on something that felt quite selfish.*

A lack of institutional support was a challenge reported by 22 respondents, and this manifested in one of two ways. Of these 22 respondents, 15 were the first in the institution to apply for PF, therefore were unable to access prior expertise within their own institutions. The remaining seven reported a lack of interest or engagement with their PF application from their institution. The process of gathering evidence of their impact was a challenge documented in 15 survey responses. They reported challenges in identifying evidence, aligning evidence to the PF criteria, and – for those seeking PF later on in their careers – recalling their impact and successes. A feeling of being an imposter and having confidence in their application was reported by eight respondents. For some this was a challenge early on in the application process, which was addressed as they appeared to become familiar with the process. For four respondents this was connected to them working unofficially as a leader rather than holding what they may have perceived as a leadership role, or a role they may have associated a PF as holding:

- + *Imposter syndrome; lack of self-belief I was operating as a strategic leader and thus finding it difficult to frame my impact. The mentor was really helpful in helping me overcome this and bring to the forefront the impact I was having for a while. I do not hold a position of authority and thus my leadership style was more soft and authentic.*

Finally, four reported challenges in preparing an application to gain recognition through the dialogic route – specifically the requirement to present to peers.

+ *I undertook a presentation and trying to meet all the criteria in a short presentation window was challenging.*

Principal Fellowship and career progression

Overall, 45.72% of respondents reported that they felt PF had assisted their careers, with 26.97% reporting they thought it had not, and 27.30% reporting that they were unsure if it had or not. Figure 8, Figure 9 and Figure 10 show responses to this question by position, gender and age group. Responses do not differ by position category ($\chi^2(df=6, n=304)=5.17, p=0.522$), or age group, when age group is treated as in Figure 2 ($\chi^2(df=4, n=298)=13.89, p=0.737$) or collapsed into superordinate categories as in Figure 10 ($\chi^2(df=4, n=298)=6.63, p=0.157$). Responses do, however, differ between Man/Male and Woman/Female respondents, with a larger proportions of Woman/Female respondents reporting PF was beneficial or that they were unsure than did Man/Male respondents ($\chi^2(df=4, n=295)=12.25, p=0.002$).

Figure 8: Did PF assist your career? – by respondent position categories

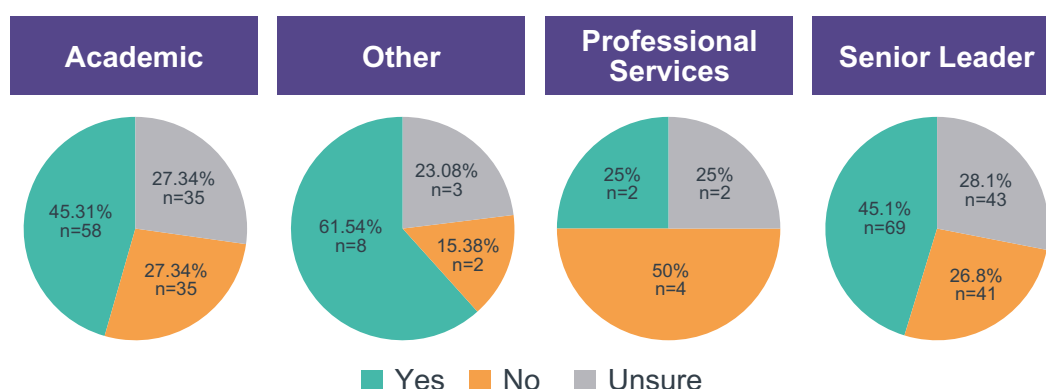


Figure 9: Did PF assist your career? – by respondent gender

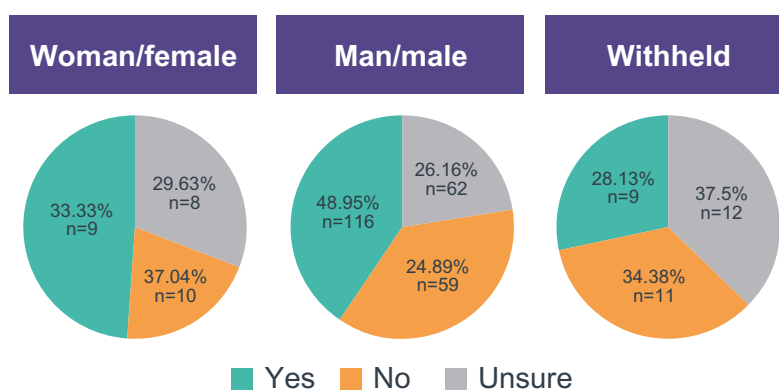
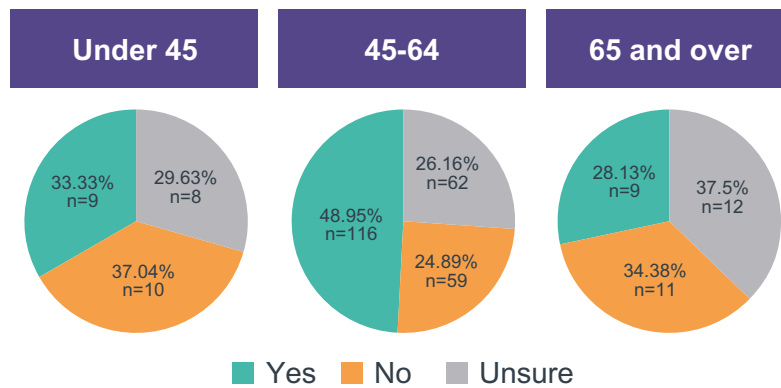


Figure 10: Did PF assist your career? – by respondent age

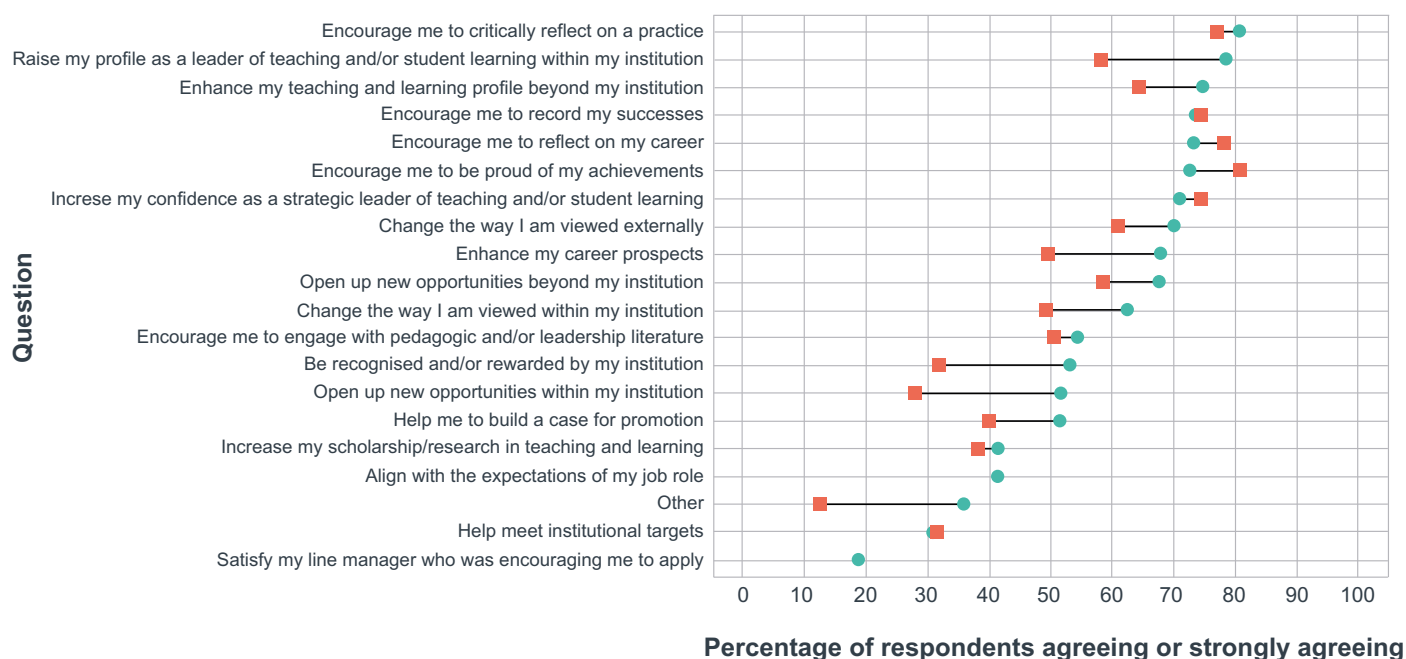
The relationship between motivation and the impact of PF

To better understand the realised impacts of achieving PF, respondents were asked to what extent they agreed or disagreed with the same 19 statements they had previously considered in relation to their initial motivation. We were particularly interested in the relationship between an individual's motivation to apply for PF (ie what they felt PF would help them achieve) and what they then reported as the outcome in terms of impact. Table 4 provides an overview of the responses to each statement by frequency and as a percentage.

Table 4: Respondent's motivation to apply for PF and the impact on their role after being awarded PF

Question	Frequency						Percentage (within Question)					
	Motivation			Impact			Motivation			Impact		
	Agree	Neither	Disagree	Agree	Neither	Disagree	Agree	Neither	Disagree	Agree	Neither	Disagree
Encourage me to critically reflect on my practice	244	34	24	232	47	22	80.79	11.26	7.95	77.08	15.61	7.31
Encourage me to engage with pedagogic and/or leadership literature	165	86	52	151	101	47	54.46	28.38	17.16	50.50	33.78	15.72
Increase my confidence as a strategic leader of teaching and/or student learning	215	56	32	224	56	21	70.96	18.48	10.56	74.42	18.60	6.98
Open up new opportunities within my institution	156	92	54	83	116	97	51.66	30.46	17.88	28.04	39.19	32.77
Open up new opportunities beyond my institution	204	69	29	175	84	40	67.55	22.85	9.60	58.53	28.09	13.38
Increase my scholarship/research in teaching and learning	125	107	70	113	125	58	41.39	35.43	23.18	38.18	42.23	19.59
Enhance my career prospects	205	65	32	149	108	43	67.88	21.52	10.60	49.67	36.00	14.33
Help me to build a case for promotion	154	72	73	118	103	74	51.51	24.08	24.41	40.00	34.92	25.08
Enhance my teaching and learning profile beyond my institution	226	55	21	191	69	37	74.83	18.21	6.95	64.31	23.23	12.46
Raise my profile as a leader of teaching and/or student learning within my institution	238	36	29	174	70	55	78.55	11.88	9.57	58.19	23.41	18.39
Change the way I am viewed within my institution	188	73	40	146	93	57	62.46	24.25	13.29	49.32	31.42	19.26
Change the way I am viewed externally	212	66	24	182	82	35	70.20	21.85	7.95	60.87	27.42	11.71
Encourage me to be proud of my achievements	220	55	28	241	38	19	72.61	18.15	9.24	80.87	12.75	6.38
Encourage me to reflect on my career	221	53	28	234	41	24	73.18	17.55	9.27	78.26	13.71	8.03
Encourage me to record my successes	222	51	28	222	54	22	73.75	16.94	9.30	74.50	18.12	7.38
Be recognised and/or rewarded by my institution	161	78	64	94	113	89	53.14	25.74	21.12	31.76	38.18	30.07
Help me to meet institutional targets	93	90	117	93	106	96	31.00	30.00	39.00	31.53	35.93	32.54
Align with the expectations of my job role	124	85	91				41.33	28.33	30.33			
Satisfy my line manager who was encouraging me to apply	57	70	176				18.81	23.10	58.09			
Other	38	55	13	6	31	11	35.85	51.89	12.26	12.50	64.58	22.92

Figure 11: Differences in percentage of respondents agreeing or strongly agreeing with each question, with respect to motivation (circles) and impact (squares).



Displayed graphically, Figure 11 illustrates the following four statements showing most divergence ($p < 0.01$):

- + raised my profile as a leader of teaching and learning within my institution
- + enhanced my career prospects
- + be recognised and rewarded by my institution
- + opened up new opportunities within my institution.

Some frustrations were expressed in relation to these four areas where the motivation to apply did not result in the anticipated impact.

As demonstrated in Figure 11, being awarded PF encouraged respondents to be proud of their achievements, and this exceeded their initial expectation. The qualitative commentary highlighted the increase in self-belief, confidence and achievements. For example, one respondent stated, *“I felt the external recognition boosted my confidence, and applying forced me to acknowledge some of the things I have achieved”*. Others noted the longevity of the award: *“I have it for life. It cannot be taken away. It is a worthwhile and meaningful achievement”*. However, a few respondents felt that there was a lack of understanding of the value and they were dissatisfied with the lack of impact for them. For example, *“If anything this makes it more frustrating – not much point being proud of your achievements if no one wants to apply them”*.

Engaging in critical reflection was an important part of the PF application process. However, for many this is part of their usual practice and being awarded PF had not changed that. Several respondents found the process of critical reflection useful in identifying the roles they had taken and the impact they have had in their institution. For example, gaining PF *“helped me identify my role in projects”* and *“[I am] more able to articulate my impact on the sector”*. Others found that the model of reflection has been useful to apply to their practice going forward and for other award applications. For example, *“I keep a list of the things I do now. I also note what I learnt, what I could have done better and collate any feedback that might show unexpected impacts to see if they will be helpful in influencing people or strategy down the line. I am always horizon scanning”* and *“writing the application has provided a very useful narrative for other uses”*. A few mentioned that they were able to support others in the development of this skill and that it helped maintain their CPD.

74.42% of respondents agree or strongly agree that being awarded PF increased their confidence as a strategic leader of teaching and/or student learning. In the qualitative commentary, almost all respondents noted the positive impact on their confidence levels. For example, *“I had recently taken on an SSG role when I [gained] my PF and this helped to overcome my imposter syndrome (to some extent)”*. A few respondents acknowledged the opportunities that had resulted from this award. For example, *“The PF award felt like an endorsement of my strategic leadership and contribution to LTA, this opened up new external networks and I definitely grew in confidence as a result”*. For three respondents the impact was less positive where they hadn’t experienced any increase in confidence. For example, one stated, *“I hoped it would, but it hasn’t really made any discernible difference”*.

Nearly half the respondents (49.67%) agree or strongly agree that being awarded PF enhanced their career prospects. There were many positive comments about more external opportunities being perceived as a result of having PF. For example, *“I have been shortlisted for posts outside of my university and I feel this is because I have PF status”*. Others felt that PF status had strengthened their CV and credibility within their area of practice, although the emphasis was on the external opportunities rather than internal. Having said that, a few respondents indicated that gaining PF enhanced their career prospects through internal promotion rounds. For example, *“I am applying for the title of Reader and I do think being PF will help that application”*. Eight respondents perceived there was no impact having reached a senior role prior to gaining PF, or that it would not change the current status quo.

When asked if being awarded PF helped respondents to build a case for promotion, many perceived that the achievement of PF had added, or would add, strength to their application for promotion. As one respondent stated, *“[PF] is an external indicator that is internationally recognised as a mark of leadership in teaching and learning at the highest level.”* Indeed, some had used it in successful applications for promotion and/or leadership type roles. For example, *“Yes, it has definitely helped pull together a number of applications, for instance for Head of LTA, Assistant Dean for Academic Development and, more recently, professorship.”* Negative comments related to the types of promotion systems that some respondents did not have access to in their HEI. For example, three respondents noted that they were excluded from promotions rounds as they were not on academic

contracts, *"I am in a professional role and cannot make a case for promotion."* Other statements relating to this question indicated that respondents were unsure of the impact. For example, one respondent stated, *"Time will tell – getting promoted on the teaching pathway is incredibly difficult. The focus is still very much academic papers however I will be applying for a Chair in January and we shall see..."*

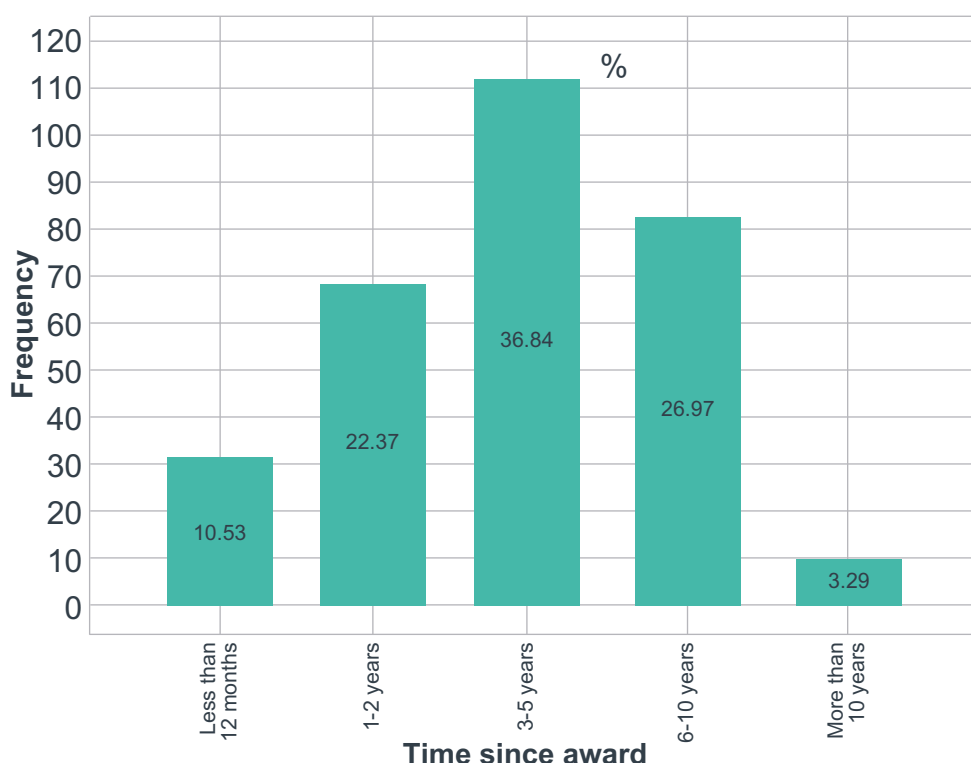
Notably, when asked whether being a PF opened up new opportunities within their institution, only 28.04% agreed or strongly agreed. Seventeen comments reflected negative experiences where their institutions did not recognise the value of the award. For example, several made comments similar to this, *"It's not an organisation that prizes fellowship to any great extent"*. In terms of positive experiences, a handful of respondents had acquired new roles in supporting, or assessing, others in their Senior or Principal Fellowships, indicating their skills had been recognised. A few respondents commented that there may be opportunities in the future or, in the case of one person, they had little time to seek those opportunities out. One respondent appeared particularly dissatisfied, stating, *"My head of dept and faculty staff could not give a shit."*

Beyond their own institutions, greater impact was noted. 64.31% of respondents indicated agree or strongly agree that being awarded PF had had an impact on improving their teaching and learning profile beyond their institution. Many respondents mentioned how it had increased their credibility both nationally and internationally. In some cases it had led to wider range of consultancy activities and scholarship opportunities. For example, *"I ran successful CPD both within and outside my institutions with the help of the Global PFHEA network and had the opportunity to be involved in other networks/ projects/ publications eg relating to assessment."* Other respondents were less sure, or had no evidence to support this.

Length of time since Principal Fellowship was awarded and impact

Since impact takes time to develop (Kneale et al, 2016) it was anticipated that the effect of gaining Principal Fellowship on both the individual and the institution might be greater for those individuals that had held the award for a longer period. In the survey sample, the majority (67.10%) had held the award for more than three years (Figure 12).

Figure 12: Length of time since being awarded PF



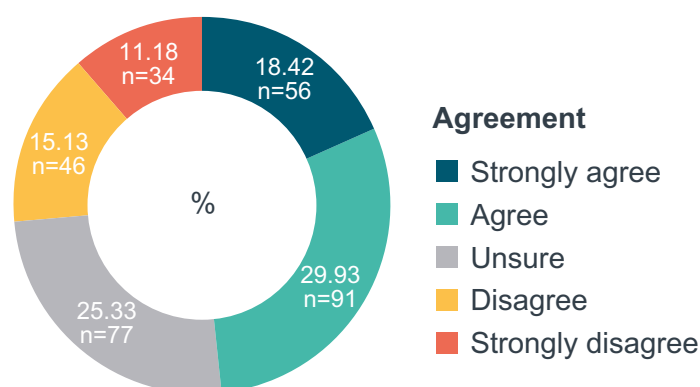
Dividing ‘time since award’ categories into ‘less than three years’ and ‘more than three years’, and comparing responses between these two groups to items related to impact on themselves and their institutions revealed that being three or more years post-PF was associated with higher numbers of agree and strongly agree responses to the following items:

- + opportunities beyond their institution ($\chi^2(df=4, n=299)=9.82, p=0.044$)
- + being asked to lead teaching and learning initiatives $\chi^2(df=4, n=293)=9.64, p=0.047$)
- + being asked to provide their expertise as a mentor for other aspiring PFs ($\chi^2(df=4, n=296)=12.89, p=0.012$)
- + being asked to provide their expertise as an assessor for institutional PF applications ($\chi^2(df=4, n=291)=16.32, p=0.003$)
- + being invited to share their teaching and learning practices ($\chi^2(df=4, n=287)=11.42, p=0.022$).

The perceived importance of PF to the executive leadership team

Employing a Likert scale, respondents were asked “To what extent do you agree that Principal Fellowship awards mattered to the executive leadership team of the institution where you gained your PF?” The responses to this question are shown in Figure 13.

Figure 13: Agreement with the statement ‘to what extent do you agree that Principal Fellowship awards mattered to the executive leadership team of the institution where you gained your PF?’



A follow-up question asked respondents to comment on their answer and four key themes emerged from the qualitative text:

- 1 PF is regarded as a tick-box exercise by some institutions and executive teams.
- 2 PF is recognised only as part of statistics and metrics rather than a recognition of the person or the role.
- 3 PF is not recognised in the same way as research successes.
- 4 Some parts of the institution recognise the importance of PF and work related to Advance HE while some are very dismissive of it.

The range of responses are exemplified in the following quotations:

“VP education may have been pleased to have higher numbers but very few senior leaders in university aware or interested in our facts or figures on fellowship.”

“[HEI]’s interest in L&T was all for its TEF targets and not for the genuine reason of supporting its students. There was an email notification of that year’s fellows, but no other acknowledgement or responsibility. A new PVC for L&T had joined the organisation and was not interested in the NTFs or senior fellows there, only their head count as a KPI. It was so sad to work in a thriving university with no teaching and learning culture, and sadly students suffered there.”

“There is an annual event for award winners from across the institution, which includes very highly prestigious awards in research fields (up to and include Nobel Prizes). PFHEA is recognised as one of the awards celebrated at this event. Our own Provost at the time gained PFHEA and was quite clear in the value he placed on it.”

“I applied for PF because I wanted to and I was successful first time. My institution would not pay for the application fee and so I paid myself. I have informed my institution (teaching, leadership, centre for academic practice) that I achieved this and have offered several times to support anyone else who is interested (as a mentor) but I’ve never even received a reply or acknowledgement of my offer. I don’t think they care at all.”

Twelve respondents spoke of the shifting value of PF within their institutions over time with many noting the fluctuation in value depending on the institutional leadership, and others reiterating the emphasis on research. For example:

“I think when the first PFs were awarded in around 2013 they were celebrated, but now you don’t even get a mention in the newsletter unless you write it yourself. This is partly a reflection of the fact that my institution has a lot of PFs and partly because research is prioritised.”

“I think it was hugely valued at the time I was awarded PF but there is new leadership and the climate has changed – it has become more autocratic – that makes it very difficult to operate as a PF.”

Does your institution recognise and reward staff for achieving their Principal Fellowship?

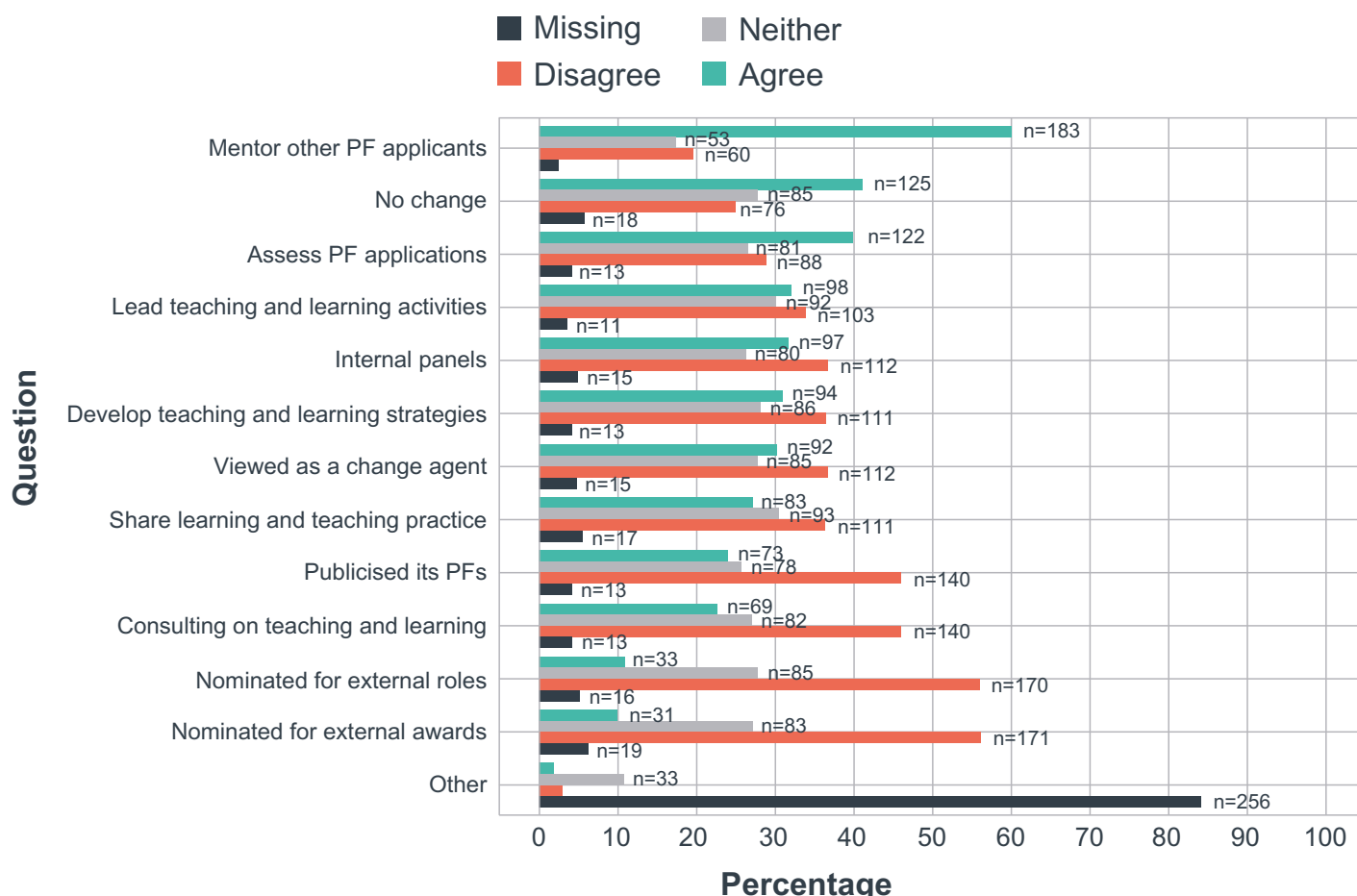
When asked whether their institution recognised or rewarded the achievement of PF, 28.7% responded positively. One hundred and twenty-three respondents chose to add further information in relation to this question, which was specifically directed at those that had answered ‘yes’. A range of examples of how organisations recognised and/or rewarded staff was provided. These included: congratulatory emails, in some cases from the VC; celebratory events; used for university metrics; mentioned in the annual teaching and learning report; teaching and learning websites and communications; summer drinks reception and announcements. In addition, 67 respondents added further negative commentary emphasising the point that PF was not recognised by their institutions. Again, the focus on research was re-emphasised:

“There’s too big a gulf between research advocates and the teaching advocates. A balance seems to be further away than at any time in my 50-year career.”

How PFs are drawn on by their institution

Again using a Likert scale, respondents were asked what PFs had been asked to do by their institution since gaining PF (Figure 14).

Figure 14: Extent to which respondents agree that their institutions had utilised them for various roles



There were a number of suggestions put forward for respondents to consider, from leading teaching and learning initiatives to not being asked to do anything. In each case respondents were asked to provide examples or comment.

For many respondents, if they are undertaking the activities suggested this is due to their roles or they were doing so already, they do not attribute this to their PF. For some, in fact, it was about doing those things that led to the award of their PF. The main activity which institutions appear to expect from their PFs is to carry out mentoring or, for a smaller number, to be involved in institutional accredited schemes. For a very small minority, despite having PF, they are not asked to do anything and they put this down to their role.

“I think the challenge for all these questions is that as Head of Learning and Teaching I was doing a lot of this sort of work anyway, leading learning and teaching initiatives anyway so I’m not sure that being a PF really made a difference to that.”

“I did this before securing PF, and this was part of the case base.”

“This is not something someone at my level would be invited to do despite having a PF.”

“Asked me to mentor a PFHEA, which I did and she too was successful!”

“My institution does not exploit the expertise of its PFs explicitly although they are almost all in roles where they can make an impact.”

The opportunity to use PFs to consult with on teaching and learning matters does not seem to be used in many institutions. Surprisingly, during the pandemic when this group might have been particularly useful in an institution where such a group does exist, it did not meet:

“We do have a group that comprises PFHEA, NTF, Associate Profs and Profs of Learning and Teaching. This group meets intermittently to discuss particular issues or to provide feedback/consultation on specific issues being discussed in the university. It has not met during the pandemic.”

One respondent sums up the overarching comments quite succinctly “*We do not use our PFs*” and this respondent explains that the PF award does not convey as much as other achievements within the institution, which presumably then lead to the recognition which would result in being asked to undertake certain activity:

“The other qualifications, publications and awards I have are much more valued and useful in the work I do and impact I have.”

5 Interviews with Principal Fellows

5.1 Introduction

To gain a more nuanced understanding of the impact of Principal Fellowship on individuals, institutions and the wider sector, semi-structured interviews were undertaken with a sample of 12 volunteers identified via the online survey.

5.2 Methodology

Guided by some of the initial outcomes from the qualitative data from the survey, a core set of questions was developed, designed to further explore some of the key themes (Appendix 1). Due to the logistics of an international project (multiple countries; different time zones), and the tight time schedule within which we were working, four members of the project team, all experienced researchers, and Principal Fellows, were responsible for undertaking the interviews. A semi-structured interview schedule was devised to ensure some consistency, although it was agreed that the interviews should also develop as conversations (Burgess, 1984) rather than be too rigid. Prior to the interviews commencing, a team meeting was held with all members of the research group to agree a consistent approach.

One hundred and fifty-nine respondents provided their email contact details in the final section of the online survey. Since impact takes time to develop (Winter et al, 2017) we deliberately targeted individuals who achieved PF more than two years ago. This is because we were particularly interested in any change in role/identity and leadership opportunity that participants attribute to gaining PF. A random stratified sampling technique was employed which took into account geography (whether inside or outside of the UK), gender and length of time participants had held the award. The final interview sample contained seven females and five males, reflecting the gender balance of the survey sample (57.57% Woman/Female; 41.12% Man/Male). Ten interviewees had obtained their PF award from within the UK and were still based there and two had obtained their award from outside the UK and were based in Asia and Australasia. Since we were particularly interested in how institutions engaged with PFs, all those we interviewed were working within an HE institution at the time of gaining their award.

5.3 Data collection

The interviews took place via Zoom and lasted between 35 and 55 minutes. For ethical reasons we did not make the completed survey data available to the interviewer ahead of the interview. This ensured this information remained anonymous and interviewees could choose to share that information again, or not. All interviews were audio recorded in full, following the recommendations of Walford (2001). To keep costs low, and to expedite the research process, the interviews were transcribed using Zoom's speech to text conversion software.

Themes explored included:

- + reflections on the process of gaining recognition (internal recognition scheme vs direct applicant) including level of support provided
- + rationale for seeking the award (intrinsic or extrinsic)
- + examples of leading initiatives /project involvement (institutional and/or wider)
- + recognition, internal and external, gained since the award of PF, and the extent it connects with their status / work as a PF
- + the relationship between gaining PF and their role in driving teaching and learning agendas (internally and externally)
- + career development opportunities since awarded PF and alignment to promotions processes.

Zoom software automatically transcribed the data which was then tidied manually by the respective interviewer to enhance sense-making. Once the transcription process was completed the interviews were sent to the participants for member-checking prior to analysis. In line with the conditions of the project's ethical approval, participants were reminded that they could withdraw any or all of their data.

5.4 Data analysis

The data management software QRS NVIVO 12 was used to code the data independently at first, and then three of the project team met to refine the coding framework. Another member of the project team then independently reviewed and checked the coding framework. The data was analysed inductively by the Principal Investigator and the Research Assistant to establish cross-cutting themes (Silverman, 2013). The interviewees were anonymised using their first initial and a number as appears in the text below (eg P1 and J1).

5.5 Key findings

5.5.1 Individual impacts of gaining PF

Pride and personal fulfilment

Overall, respondents talked warmly of being recognised as a PF. They expressed a sense of pride associated with gaining their PF (P1/J1) or of experiencing an enhanced 'sense of status' (K1). Equally they all valued the networking experiences they associated with being a PF as a result of the connections and collaborations developed within their own organisations and beyond (E1/O1):

“It was nice to make contact with other people who were doing similar kinds of roles.”

(P2)

In particular, this sense of pride in gaining PFHEA had a lasting impact for a number of respondents; even though, for some, considerable time had passed since they had achieved their recognition. For example, one respondent who had subsequently left academia noted:

“I eventually chucked out everything except one carrier bag... it included my PF application.”
(J1)

While some interviewees reported struggles in finding the time to write their application, all conveyed a sense of personal fulfilment from the process of applying, gaining or being a PF. This was a prominent theme across the dataset:

“As an individual, I actually value the experience and the opportunity, as well as the after effect, the connection and everything. To me, this has been very positive individually.”
(E1)

Professional credibility

Eleven of the 12 interviewees highlighted the impact being a PF had on their sense of professional credibility, emphasising how having PF signalled to those within their own organisations that their opinion mattered and should be valued:

“If I am talking about learning and teaching there’s a reason why, you know, in addition to what I’m saying that I should be taken seriously.”
(J1)

“I think it does help to give that kind of credence and confidence...it’s a little bit like using your ‘doctor’ or your ‘professor’ title or something in front of your name. It just maybe just reinforces.”
(S2)

Discussions of professional credibility also connected to the sense of recognition they gained from achieving PF, and that this recognition was bestowed by peers of equal standing:

“You know, I was really pleased that someone external who didn’t know me was having a look at that application and could assess me on what I done there.”
(P3)

The most cited use of PFHEA recognition was inclusion in email signatures. Several interviewees qualified this decision based on the pride they felt in their status, for example:

“I stick it on my email footer along with my other qualifications. I think it, it’s one that I would always be proud of, I think, I think it is, it is difficult to achieve.”
(M1)

Respondents also talked of it being used as a benchmark, that could be useful to signal quality at specific times, eg to external bodies; this was highlighted by both the international respondents, but mentioned by three of our UK based participants:

“Having recognition by an international organisation...That was going to be far more prestigious than an Australian-based organisation...whether that was right or wrong kind of doesn't matter.”

(G1)

Career development and the journey to PF

Interviewees articulated impacts relating to their career development. Six respondents indicated it provided useful evidence in gaining promotion within their organisation or assisting them in securing a new position:

“It is one of the, not a condition, but a recommendation for a professor application within the university. I've gone through our learning and teaching professorial route, and it is one of the [criteria] along with the National Teaching Fellowship. It is one of the things that, it's not an essential, but, it's a desirable.”

(P3)

“I moved to a big university [...] and I think, you know, there you've got responsibilities around, learning, research, the whole shebang. And so I think bringing a Principal Fellow, I don't think it gets you the job, but it would certainly speak to the panel that you kind of have that thing, and that's a good thing to have.”

(C1)

That said, disappointment was also evident when discussing the subject of promotion, depending on the extent to which institutions' promotional pathways had altered to consider PF:

“No, to my sadness it is not [recognised] because I've actually spoken with my VP, and I said: 'Do you think I actually qualify to be a reader or professor?', he said no doubt in his mind, but~the university just not do this... it's not present...so I couldn't get the professor title.”

(E1)

“How does Principal Fellow, which feels like a really significant marker of achievement, expertise, accruing all this experience... you know it's like, it felt like a big deal, and yet it didn't feed in in any way to any promotion processes, and that was a frustration at one point for me. I mean I was talking to our Dean and we were saying, you know, really, if you got that, that's almost that's the evidence...many pages and lots of words of evidence that's been peer reviewed and then, you know, check, check, you know you got feedback, not yet, do it again, add more on assessment, etc ...you get through that and that should kind of be banked as evidence against certain bits of the promotion criteria for, you know, the teaching route through to Reader or Professor... And it wasn't.”

(C1)

For three interviewees the success of gaining PF stimulated reflection on their practice and career development:

“I think this is the value of fellowship... is that it forces you to stop for a while, and to reflect and to think and, at times, to actually ask questions: ‘Am I being effective?’, ‘Am I being impactful?’ and to try and seek out that evidence. So, yes, you know, I think the process did that for me.”

(S2)

One respondent, a senior leader involved in institutional promotion processes, reflected on the lasting impact writing a PF application had on how participants presented themselves in promotions processes:

“They don’t just write down a series of activities. They actually write down the storyline, the themes, they start with sort of what drives them what’s their passion, and they go through here are the activities I’ve done but actually here’s the outcomes.”

(G1)

These comments demonstrate the potentially lasting impact of how PFs reflect on, and examine, their practice which was identified explicitly by (M1) as integral to the process:

“I think that to be successful in making an application you need to be able to be fully reflective and recognise the strengths and weaknesses in your own approach to learning and teaching. Yeah, and recognise you know that you don’t always get it right and that you’re, you’re always learning.”

(M1)

Being encouraged to reflect on approaches to the leadership of teaching and learning could provide a rare opportunity to develop a valuable skill on which applicants can build in the future.

More widely, connections were made by three respondents between holding PF and possessing external credibility, which in turn helped them secure appointments such external examining, and appointment to external advisory boards:

“I think also it’s probably helped with some external examiner appointments, which are so competitive these days... If you don’t have PF you’re just going to be screened out of those.”

(S2)

However, for most, the impact of their career development was not as easy to disentangle, for example:

“I don’t know whether I actually got the Editor in Chief role because I’m a PF...and of course everybody on the team recognises the PFs on the editorial board, and so perhaps it was because of that? But I really cannot say for sure.”

(E1)

“[PF] by itself hasn’t made any difference. What I think has made the difference was the journey I went through and the things I learned, both about myself and how to work with other people.”
(S2)

Impacts on career development depended on where individuals were in their careers at the time PF was achieved. Four interviewees were in the latter stages of their career at the time they gained PF; these individuals had already achieved considerable success as senior leaders in teaching and learning within their own organisations, as well as externally. Two of the four applied to gain recognition as a PF, but also to understand the process and serve as role models within their respective institutions. Though recognition as a PF was important to them, they felt it was too late to have an impact on their careers:

“It just means that I did it at a stage in my career when I was already on a particular path. Did it help me get the job I wanted to help me? No, not directly, but the things I learned from doing it helped me.”

(G1)

Institutional recognition

Before considering the impacts of PF on institutions, it is worth taking a step back and considering the reaction of the institution to our interviewees when they received their award. This may provide a useful indication of how PFs may be drawn on in the future. Seven interviewees talked of institutional recognition, and the form this took. Two provided positive accounts of awards ceremonies that had taken place, for example:

“We ran annual staff awards which were almost like a mini graduation, you know you had the Vice Chancellor on a stage and people got all sorts of awards trailed past and got the handshake...[This] was really quite important for a lot of people, particularly if they haven’t had graduations for their education in the past. So I was trailed over the stage and it was one of those ironic situations where I was standing at one end, guiding people on and then had to leap on myself.”

(S2)

One noted that achieving PF “shines a spotlight” (O1) on areas of work they were interested in, and this was a useful way of developing further impact.

5.5.2 Institutional impacts of gaining PF

Determining the impact of PF on an institution is more complex. In framing the findings here it is worth noting we are only reporting one perspective, that of those holding PF status. It was beyond the scope of this exploratory study to capture the views from institutional leaders for teaching and learning, and education developers, for example. Across most respondents there was a sense of disappointment around institutional impacts, with one interviewing stating: “I don’t think they [institutions] really know what to do with them [PFs]” (P1). A key observation made by several interviewees was that institutional impact depended very much on the individual who held the award:

“I think academics shouldn’t wait for someone else to value them, or to, you know, tap them on the shoulder. I think they have to be a bit more proactive than that. [...] you can’t sort of sit back and wait for someone to sort of say ‘gee you know you’re important, we’d like you to do this that or the other’. And it’d be nice if they did, but let’s just be realistic.”

(G1)

Being proactive – volunteering to lead, taking responsibility or acting for the benefit of the institution – was highlighted by five respondents as essential to the strategic use and impact of the PF. Across this data there was a sense this would not be easy to achieve, depending on several factors such as personality of the award holder (ie if they were a person who would naturally take the lead) and their role within the institution (ie whether they were in a position to lead or influence change), as noted below:

“So I personally don’t think that either for me or others in the institution that there has been maybe the level of usage of us... I don’t think they’re benefiting from the skills that we’ve demonstrated we have. For some who are in senior positions that’s a natural norm for their job anyway. But for those of us who are maybe more dispersed and hidden, I think it’s quite hard sometimes to engineer a way to get your voice heard.”

(S2)

Is anyone listening to Principal Fellows?

Not having your voice heard, or feeling their status as a PF was invisible was a source of frustration reported by seven interviewees and echoes some of the concerns raised by survey respondents:

“And then here I am, and there isn’t really kind of an active network or a systematic way to kind of..... We are not drawn upon. And I just think, why is that? You know, no one really cares... I wonder if that’s kind of a better question to the sector... Why aren’t we drawn upon more? Not that I know how we could be drawn upon.”

(C1)

A number of potential mitigating factors were identified. Four suggested the lack of engagement with PFs may reflect the persistent favouring of research over teaching, for example:

“Teaching is still, whatever you like to think... a poor relation in relation to research, especially within a REF year.”

(P2)

It was also suggested that the relative infancy of the title PF, in relation to other academic titles, and the lack of a wider understanding of what being a PF meant, was limiting the extent to which PFs were drawn on:

“It might be, perhaps, a lack of understanding about the leadership side or the strategic leadership side of a PF application [...] You may just equate it to one of the other fellowships perhaps?”

(P3)

“It’s one of those things that if you know and understand what it means you value it more highly. But how do you get everybody to know and understand what it means?”

(M1)

Finally, institution size and focus clearly played a role, with two respondents highlighting this.

Making connections within the institution

Interviewees frequently reported enjoying informally connecting with SF/PFs through institutional meetings (often connected to Advance HE related activities):

“And it does mean something to me when I meet another Principal Fellow within the university... but there isn’t an organisation within the university of Principal Fellows. You know, I regularly sit on the internal panel to assess applications and that’s where I tend to meet other fellows.”

(K1)

Five noted that, for several reasons, (eg the lack of a critical mass of PFs, the impact of Covid-19, or a change in personnel) that these mechanisms or groups had either waned, or had yet to gain momentum or to become formalised into an active community.

“Prior to the pandemic we did set up a community of practice of our Principal Fellows, National Teaching Fellows, Associate Profs and Profs, and we would get together if there was something to discuss, or a consultation document or something or either a national or institutional strategy, we would bring the community practice together. It sort of waned a bit during the pandemic.”

(P3)

Engagement in institutional teaching and learning agendas

Although there was a mixed picture in the extent to which formal / informal networks have developed to provide a space for PFs to meet and network, this does not mean that institutions were not drawing on their PFs. Two interviewees provided explicit examples of where they had been brought together to work on specific agendas:

“And so what I’ve done at a few of my universities is to always try and promote, well all the fellows, but in particular principal fellows, to get them to try and be part of a, for want of a better term, an ‘Educational Think Tank’.”

(G1)

Indeed, this was an idea suggested by a further three fellows as a way the organisation could engage PFs more strategically:

“I mean if I if I was choosing, I would be thinking well, you know, if I’ve got a working group on this or, you know, a priority task force on that, then PFs are one constituent group that I would think of being my ‘go to people’...I think they are a community of practice or a sounding board that you could use extremely well.”

(S2)

While this does seem like a simple way to develop, and promote the use of PFs, one interviewee had explored this, and faced resistance. For this individual it was the external networks where they believed greater influence could be exercised:

“I suggested to my now Vice-Chancellor a couple years ago that it would be useful to set up a community of practice within the university that included PFHEAs, and I also included NTFs in that, because for both of those I felt that there was this detrimental experience of having achieved something significant and substantial and maybe having had a kind of pat on the head from your institution [...] I was told no, no, they didn’t think that that would be useful [...] I do see from the applications coming forward that for many of us the externality is the bit where people are maybe gaining further traction from having a PFHEA, you know rather than internally.”

(S2)

One of the most frequently cited institutional impacts of PFs (n=6) was the mentoring provided to colleagues in support of applications for SF or PF. Depending on their role, this mentoring was either officially in connection with an institutional CPD scheme, or informally, to those applying directly to Advance HE. Again, this finding aligns to the survey data. There was a sense from respondents they relished taking on this role, and in so doing, were giving back to the institution.

5.5.3 Impacts beyond applicants' own institution

Though interviewees did clearly have a mixed experience in terms of the extent to which their institutions either acknowledged, engaged with or drew on their expertise as PFs, wider impacts on the sector were identified. Areas or activities with which PFs could take the lead included: disciplinary networks / communities of practice, or through regional PF networks. Where formal PF external networks had emerged, either physical or virtual, interviewees reported being contributors to these. They acknowledged the value of these networks, citing them as a source of expertise they could draw on for the benefit of their institution:

"I find actually the Principal Fellows network that I'm a part of incredibly useful, I use it a lot to bring in people that I want to, you know, so for example, we have an external committee member on our learning, teaching committee and are on our research committee. And I always recruit those from the principal fellow network, because I think it's really good. You know, you kind of know what you're getting."

(M1)

"I've been to local meetings, they've always been really good and really useful...Yeah, and they know each other and they're more politically aware."

(S1)

In reflecting on the value of these networks they highlighted further opportunities they thought were potentially underdeveloped or currently overlooked:

"I just wonder whether there's more of a PF global network that could have those almost excuses to get together and have a discussion, but there's nothing really."

(P3)

6 Summary and recommendations

6.1 Summary

In this first international review of Principal Fellowships we set out to explore the impact of gaining PF on the individual and the institutional enhancement of teaching and learning. The data provides important insights into the extent to which PFs are supported, recognised and rewarded within their institutions and how institutions engage with their PFs (or not) to support the institutional enhancement of teaching and learning. The data also reveals the individual motivations for engagement in the recognition process and the resulting individual, institutional and wider impacts of becoming a PF.

Impacts at the individual level

Our analysis shows that the process of developing a successful PF application impacts the individual in many positive, and sometimes profound, ways. Despite a diversity of respondents engaged in this research, the key motivations behind individuals applying for PF were remarkably similar, with four primary reasons:

- 1 To encourage applicants to critically reflect on their practice.
- 2 To raise the applicant's profile as a leader of teaching and learning within their own institution.
- 3 To enhance the applicant's teaching and learning profile beyond their institution.
- 4 To encourage the recording of individual successes.

In terms of individual identity, becoming a PF afforded respondents a sense of pride in their achievements (80.87%) and impacted individuals' confidence as strategic leaders of teaching and learning (74.42%). As might be expected, the extent of this impact varied according to the role held, with those in more senior roles, or being close to retirement at the time of the application, declaring less impact. Nonetheless, when considering the complete survey dataset, both of these impacts exceeded the applicants' initial expectations.

The reflective process (whether via the written or dialogic route) provided applicants with the opportunity to think deeply about their practice (77.08%) and in both the survey qualitative commentary and the interview data respondents relayed how powerful this process could be. While it was frequently noted that being a reflective practitioner was part of respondents' usual practice, the narrative carefully crafted during the process of applying for PF was often repurposed for other uses, such as for promotions applications, thus extending the impact further, and in some cases, for several years. Participants described the 'journey' towards becoming a PF, a journey that entailed multiple aspects. Disentangling the specific impact of PF was therefore not always possible. However, the journey itself, requiring participants to seek out, record and carefully analyse their practices, achievements and resulting impacts was considered highly valuable.

While the reflective process was deemed to be worthwhile and meaningful, a key challenge in relation to obtaining PF was the reflective writing style. This was reported by almost half of the survey respondents (n=151) and is also highlighted in the literature in relation to other categories of fellowship (see, for example, Heron and Corradini, 2020). This finding underscores the significance of a mentor/

critical friend to guide the process, with more than 80% of respondents acknowledging the importance of formative feedback on early drafts of their applications. The recent launch (2021) of the Principal Fellowship Record of Educational Impact Support Session (PREI) provides further support for PF applicants through feedback on an annotated REI during a conversation with a PSF consultant. While in its early days, this initiative has already received positive feedback and goes some way to address concerns about the overall first-time success rate of PF applications. This new initiative complements the writing retreats and review of draft applications that have been offered by Advance HE for some time.

Nearly half of survey respondents agreed that being awarded PF enhanced their career prospects. Again, this varied according to the seniority of the position held at the time of the application and the type of role held. Of note, of the eight respondents who identified as 'professional services' staff, only two felt that PF assisted in their career progression. An interesting finding was that the impact on career differed by gender with a larger proportion of woman/female respondents reporting PF as beneficial. This may be a result of the mentoring process that frequently occurs as applicants develop their evidence into a convincing narrative. Alternatively, it may be the external endorsement of the award itself, combined with the supportive process that enhances self-efficacy as previous research on Fellowships has demonstrated (Cathcart et al, 2021).

Negative comments largely related to the challenges of being promoted on institutional teaching pathways and the lower status of teaching compared to research. While previous research has highlighted that Fellowships of all levels are being increasingly linked to promotion (see, for example, Spowart et al, 2020), many institutions have not incorporated PF into their criteria at the more senior levels, and there remains a lack of clarity in the sector about the evidence required for promotion, especially at the highest levels (Smith and Walker, 2021). This has resulted in significant disappointments, which were expressed repeatedly throughout this research study.

Impacts at the institutional level

While the impacts on the individual were clear, perceived institutional impacts were more variable with only 28% of respondents agreeing that new opportunities had been opened up within their own institutions as a result of obtaining PF. Since raising the status of the applicant's profile as a leader of teaching and learning was a key motivation for applying (78.55% of respondents), there is a significant disconnect here. The qualitative commentary from the survey and the interview data aligned to reveal considerable frustrations that PFs were not used more strategically by institutions, or, in some cases, were not drawn on at all. Aside from the roles that PFs already held, the most common method in which PFs were engaged in the institutional enhancement of teaching and learning was via institutional CPD schemes by performing a mentoring function to prospective applicants for SF and PF.

Survey respondents and interviewees also noted being asked to mentor SF and PF applicants applying directly to Advance HE. As highlighted in this report, mentoring for fellowship awards is an important function that is highly valued and deemed as 'critical to success' by those PFs that have been supported in this way. Nonetheless, institutions could usefully consider if there are additional

ways in which they can draw on the substantial expertise of PFs, particularly given the rapidly shifting nature of HE since the start of the Covid-19 pandemic. A potential barrier to greater engagement of PFs, which was highlighted by some respondents, was the lack of understanding of the meaning of PF across the sector.

Institutional reward and recognition varied across both the survey and interview datasets. 28.7% responded positively when asked if their institution recognised or rewarded the award of PF citing examples such as: congratulatory emails; awards ceremonies and internal media communications. While we did not invite negative responses, 67 survey respondents chose to tell us in various ways that their organisation did not recognise or value PF.

An important finding that emerged from the survey data was the length of time it appears to take to develop institutional and sector-wide impacts. According to our data, being asked to provide expertise as a mentor or assessor, and to lead teaching and learning initiatives, is more likely to happen after three years post-PF. Similarly, doors seem to open up beyond the institution after three years. This is an important finding for two reasons. Firstly, since the original motivations for applying did not always lead to the expected outcomes, those responsible for supporting PFs (eg mentors, critical friends, line managers and CPD scheme leaders) should ensure that the expectations of applicants are realistic from the outset. There is potentially a role for Advance HE here to ensure that this message is cascaded via appropriate channels and training events. In relation to this, we note that Advance HE articulates one of the benefits of gaining PF is that it is increasingly a criterion for “promotion for strategic management and leadership positions” (Advance HE, 2021). According to our dataset this was only the case for 8.3% of our survey respondents. Messaging such as this may be a factor underlying the disillusionment expressed throughout our data.

Three key factors in preventing wider institutional impacts were identified. The first related to the strategic leadership of the institution and the value placed on teaching and learning (frequently mentioned in relation to research). The second related to the relative infancy of the title PF, in relation to other academic titles, and the lack of a wider understanding of what being a PF meant. Finally, some interviewees noted the role PFs themselves needed to play in positioning themselves within teaching and learning agendas.

It is also worth noting that the positive individual impacts identified in both the survey and the interview data may reasonably go beyond the residual effects for the individual participants. Increase in confidence and self-belief may lead to improvements in a whole range of institutional activities associated with teaching and learning (Cathcart et al, 2021). However, based on the data we can speculate that the value may be held back by some of the frustrations expressed, such as a perceived lack of value conferred by many institutions due to a lack of reward and recognition.

Impacts beyond the institution

There was agreement across the survey data and the interview data that PFs could gain most traction beyond the institution. 64.31% of respondents agreed or strongly agreed that being awarded PF had improved their teaching and learning profile beyond their institution with external networks frequently cited as being constructive and valuable spaces in this regard. Respondents revealed how having PF had increased their credibility both nationally and internationally and many reported using the post-nominal PFHEA to communicate their success. In some cases, holding PF had led to a wider range of consultancy activities (including working with Advance HE) as well as increased opportunities to engage in scholarship and research.

6.2 Recommendations

On the basis of this research, there are several areas that Advance HE, individuals and senior institutional leaders could consider to gain the most benefit from the award of Principal Fellowship.

- + Advance HE could work with the Expert Advisory Group (EAG) for Fellowships and Accreditation to develop guidance for accredited institutions focused specifically on how senior leaders within institutions might engage with PFs to initiate and drive institutional teaching and learning agendas.
- + By providing follow-up professional development opportunities, Advance HE could support individuals, once they become PFs, to further develop their own teaching and learning profiles within and beyond HE institutions, and to consider how to better position themselves in driving strategic teaching and learning agendas.
- + Regional networks were noted as being valuable spaces for PFs to share ideas and develop wider networks. By their very nature they are also communities of practice with considerable expertise and experience in teaching and learning matters. Advance HE might wish to consider how these networks might be better leveraged to support the strategic enhancement of teaching and learning.
- + A key challenge in developing the application was in relation to gathering the substantial evidence base required to demonstrate impact. Performance development review processes within HE institutions could usefully embed aspects of 'demonstrating impact in teaching and learning' at an early stage in academics' careers so that staff are supported to demonstrate impact systematically.
- + While there are a small number of dialogic routes to achieving PF via CPD schemes, currently those applying via the direct route must produce a written application. Advance HE, in consultation with accredited programme leaders, should continue to consider the development of alternative and more inclusive pathways to achieving PF, particularly given the increasing uptake of the award beyond the UK.

6.3 Areas for further research and development

This research has focused on the experiences of those individuals awarded PF. A limitation of the study is the high first-time success rate of respondents (87.17%), which is not reflective of the sector average (~52% in 2019/20). A further limiting factor is that we have not heard from unsuccessful applicants. To gain a more comprehensive picture of how PF is situated within the sector, and the varied ways in which PFs engage (or not) with institutional teaching and learning agendas, the following are areas that warrant further exploration and development.

- + Research which explores the experiences of those applicants who are unsuccessful would enhance our overall understanding of applicant experiences and impact.
- + While our data illustrates that many PFs do not feel that senior leaders value or understand Principal Fellowship, this research did not specifically target the voices of senior management teams (although 50.66% of our survey sample occupied senior leadership positions). To gain a more complete picture, future research could include a focus on the voices of VCs and DVCs/ PVCs to consider how institutions might engage with PFs in more strategic ways to drive teaching and learning agendas.
- + Institutional and regional PF networks were mentioned repeatedly by both survey respondents and interviewees in this project, yet little is known about the impact and influence of these. Future research could explore the role, function, approaches and impacts of these networks in developing teaching and learning communities of practice.
- + With a few exceptions (eg George and Rowland, 2019 and Savage, 2019) there is very little qualitative research that considers the impact of Fellowships for those individuals occupying professional service positions. At the PF category this research is non-existent. Gaining an understanding of the experiences of this particular group of applicants would provide deeper insights into the impact of this award beyond teaching and learning-focused staff.
- + Making the award of PF within institutional CPD schemes presents particular challenges due to the power relations at play. In-depth, independent, qualitative research with a critical theory lens, which focuses on how these power relations manifest themselves would add to the scholarly literature on Fellowships.
- + Since impact takes time to develop, this research targeted interviewees who had held PF for at least two years. The scope of this research could be extended to include a longitudinal study of those who have more recently obtained PF, and are using it to explore their development as senior leaders in teaching and learning.

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Appendix: Principal Fellowship Impact Survey 2021

Page 1: Understanding the Impact of Principal Fellowships on Individuals and Institutions

What is this project about?

This independent international project is being undertaken to better understand the impact of being awarded Principal Fellowship (<https://www.advance-he.ac.uk/fellowship/principal-fellowship>), both on the individual and on the institution. The project is sponsored by Advance HE and the link sent to ALL current Principal Fellows. We anticipate that the outcomes of this research will contribute to the future development of the Professional Standards Framework and thus enhance the support Advance HE gives to individuals and institutions. The findings will also be useful for institutions with accredited CPD Schemes that currently support (or would wish to support in the future) applications for Principal Fellowship.

We are very grateful for the time that you give to complete this survey which should take no longer than 20 minutes

Who are the researchers?

The research is being led by Dr Lucy Spowart from Plymouth University Medical School. All data will be analysed by researchers from Plymouth. The project is collaborative and also includes:

Dr Rebecca Turner, University of Plymouth

Dr Harriet Dunbar-Morris, University of Portsmouth

Dr Rachael Carkett, Independent HE Consultant

What will happen to my responses?

All of your responses from the survey will be collected, analysed and stored in accordance with the [University of Plymouth's data protection policy](#).

The information will be used to produce reports for Advance HE, academic publications and conference papers about the impact of Principal Fellowships. The project has received formal approval by the Advance HE Ethics Committee.

Will my taking part in the study be kept confidential?

You will not be identified by name in any report about the project, and any references to institutions will be anonymised. Procedures for the handling, processing, storage and destruction of your data will be compliant with the [UK's Data Protection Act 2018](#). Some parts of the data collected for the study may be looked at by authorised representatives of regulatory authorities to check that the study is being correctly carried out. Should this occur, all such individuals will have a duty of confidentiality to you as a research participant.

How can I find out about the findings?

The anonymised findings will be reported and disseminated by Advance HE and the research team.

Who can I contact for further information?

If you have any questions about the research, please let us know as we are happy to address any concerns, however

Lucy.spowart@plymouth.ac.uk

What if I want to change my mind about participating in this survey?

Participation is voluntary and you are free to withdraw from the survey at any point before you submit your responses. However, as your responses will be anonymised once you have responded we are unable to withdraw an individual's data. If you choose to withdraw from the study, you will not be disadvantaged in any way.

1. Participation Statement- Please tick to indicate your consent and understanding (all boxes need to be ticked)

- ☐ I understand that participation in this project is voluntary.
- ☐ I understand that choosing to complete the questionnaire or not will have no impact on my relationship with the researchers, or my institution, and will have no impact on my Fellowship status.
- ☐ I understand that my responses will be treated with complete confidentiality and no names will be used in any outcomes of the research.
- ☐ I understand that completing the survey and clicking submit is indication of implied consent to participate in this research.

Page 2

2. How long is it since you were awarded Principal Fellowship?

- ☐ Less than 12months
- ☐ 1-2 years
- ☐ 3-5 years
- ☐ 6-10 years
- ☐ More than 10 years

3. Where were you primarily located when you achieved your Principal Fellowship award?

- ☐ At an educational institution in the UK
- ☐ At an educational institution outside the UK
- ☐ In the UK but I was not based within an educational institution
- ☐ Outside the UK but I was not based within an educational institution

4. How many times did you apply for Principal Fellowship?

- ☐ I was successful first time
- ☐ I was successful second time
- ☐ I took more than 2 attempts until I was successful

5. What route did you take to achieving Principal Fellowship?

- ☐ Accredited institutional CPD scheme
- ☐ Direct application to Advance HE
- ☐ I was unsuccessful through my institution's CPD scheme and then applied directly to Advance HE
- ☐ I was unsuccessful via a direct application to Advance HE and I then applied through an accredited CPD scheme
- ☐ Other

5.a. If you selected Other, please explain:

6. Did you previously hold a category of HEA fellowship? Tick all that apply

- ☐ No prior Fellowship
- ☐ Associate Fellow (AFHEA)
- ☐ Fellow (FHEA)
- ☐ Senior Fellow (SFHEA)

7. What BEST describes your role at the time you were awarded Principal Fellowship? Pick one

[+ More info](#)

- ☐ Traditional academic with a balance of research and teaching
- ☐ Teaching focused academic
- ☐ Research focused academic
- ☐ Professional Services staff
- ☐ Technical and specialist support staff
- ☐ Academic/Educational developer
- ☐ Senior Leader (Academic)
- ☐ Senior Leader (Professional Services)
- ☐ Senior Leader (Central university management)
- ☐ External to an institution (e.g. Consultant)
- ☐ Other

7.a. If you selected Other, please specify:

7.b. What was your job title and role at the time you were awarded Principal Fellowship?

8. If your role has changed what BEST describes your role now? Please pick only one

- ☐ Traditional academic with a balance of research and teaching

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- ☐ Professional services staff
- ☐ Technical and specialist support staff
- ☐ Academic/staff developer
- ☐ Senior Leader (Academic)
- ☐ Senior Leader (Professional Services)
- ☐ Senior Leader (Central university management)
- ☐ External to an institution (e.g. Consultant)
- ☐ Retired
- ☐ Other
- ☐ Not applicable. My role has not changed

8.a. If you selected Other, please specify *

8.b. If your job role has changed since gaining Principal Fellowship, what is your job title and role now?

8.c. Have you changed institution since you were awarded your PF?

- ☐ Yes (If yes, please go to Q.8d)
- ☐ No
- ☐ More than once

8.d. Did gaining your Principal Fellowship play any part in securing your new role? Please explain

Page 3: MOTIVATION AND SUPPORT FOR PRINCIPAL FELLOWSHIP In this section we are interested in understanding your motivation behind applying for Principal Fellowship and the support that you accessed. Please reflect back to your original decision to embark upon the process and consider all factors that applied to you at the time.

9. To what extent do you agree or disagree with the following statement relating to your original motivation to apply for Principal Fellowship?

	I was motivated to apply for Principal Fellowship because I believed it would...				
	Strongly agree	Agree	Neither Agree nor disagree	Disagree	Strongly disagree
Encourage me to critically reflect on my practice	☐	☐	☐	☐	☐
Encourage me to engage with pedagogic and/or leadership literature	☐	☐	☐	☐	☐
Increase my confidence as a strategic leader of teaching and/or student learning	☐	☐	☐	☐	☐
Open up new opportunities within my institution	☐	☐	☐	☐	☐
Open up new opportunities beyond my institution (e.g. access to new networks)	☐	☐	☐	☐	☐
Increase my scholarship/research in teaching and learning	☐	☐	☐	☐	☐
Enhance my career prospects	☐	☐	☐	☐	☐
Help me to build a case for promotion	☐	☐	☐	☐	☐
Enhance my teaching and learning profile beyond my institution	☐	☐	☐	☐	☐
Raise my profile as a leader of teaching and/or student learning within my institution.	☐	☐	☐	☐	☐
Change the way I am viewed within my institution	☐	☐	☐	☐	☐
Change the way I am viewed externally	☐	☐	☐	☐	☐
Encourage me to be proud of my achievements	☐	☐	☐	☐	☐
Encourage me to reflect on my career	☐	☐	☐	☐	☐
Encourage me to record my successes	☐	☐	☐	☐	☐
Be recognised and/or rewarded by my institution	☐	☐	☐	☐	☐
Help me to meet institutional targets	☐	☐	☐	☐	☐
Align with the expectations of my job role	☐	☐	☐	☐	☐
Satisfy my line manager who was encouraging me to apply	☐	☐	☐	☐	☐
Other	☐	☐	☐	☐	☐

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9.a. If you selected Other, please specify

10. Was Principal Fellowship aligned to your promotions framework at the time you applied?

- ☐

Yes, it is a requirement for promotion on some pathways
- ☐

Yes, it is explicitly referred to but not a requirement
- ☐

No
- ☐

Unsure

10.a. You may wish to explain your response here:

11. What support did you access to help you to achieve your Principal Fellowship? In your opinion what, if any, impact did that support have on the outcome of your Principal Fellowship application (Please tick all that apply e.g. large positive, some negative for the same attribute and comment as necessary)

	Support					In what ways?
	Large positive impact	Some impact	Neutral/zero impact	Some negative impact	Large negative impact	
I used Advance HE's Fellowship Category Tool to help me decide to apply	☐	☐	☐	☐	☐	
I received support from my line manager	☐	☐	☐	☐	☐	
I received support from existing Principal Fellow/s	☐	☐	☐	☐	☐	
I received formative feedback on my draft application	☐	☐	☐	☐	☐	

I had sight of previously successful Principal Fellowship applications	☐	☐	☐	☐	☐	
I received mentoring from a close colleague	☐	☐	☐	☐	☐	
I received mentoring through the institutional CPD scheme	☐	☐	☐	☐	☐	
I accessed written guidance on Advance HE's (formerly the Higher Education Academy) website	☐	☐	☐	☐	☐	
I accessed the written guidance produced by my institution	☐	☐	☐	☐	☐	
I attended a workshop/writing retreat run by my institution	☐	☐	☐	☐	☐	
I attended a workshop/writing retreat run by Advance HE (Formerly HEA)	☐	☐	☐	☐	☐	
I received mentoring from an external consultant	☐	☐	☐	☐	☐	
Other (please specify)	☐	☐	☐	☐	☐	

11.a. If you selected Other, please specify:

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12. What one thing would you say was the most important to the success of your application for Principal Fellowship and why?

13. What was the most challenging aspect of completing your application and why?

Page 4: REALISED INDIVIDUAL IMPACTS: In this section we explore how gaining Principal Fellowship has impacted on you and your professional practice and professional identity.

14. Has the process of gaining Principal Fellowship assisted you in your career so far?

- ☐ Yes
- ☐ No
- ☐ Unsure

14.a. Please feel free to comment on your answer below

15. To what extent do you agree with the following statements about the **impact** gaining Principal Fellowship has had on you?
(Please tick all that apply and provide examples where possible)

	Being awarded PF has had an impact by...					In what ways?
	Strongly Agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	
Encouraging me to critically reflect on my practice	☐	☐	☐	☐	☐	
Encouraging me to engage with pedagogic and/or leadership literature	☐	☐	☐	☐	☐	
Increasing my confidence as a strategic leader of teaching and/or student learning	☐	☐	☐	☐	☐	
Opening up new opportunities within my institution	☐	☐	☐	☐	☐	

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Opening up new opportunities beyond my institution (e.g. access to new networks)	☐	☐	☐	☐	☐	
Increasing my scholarship/research in teaching and learning	☐	☐	☐	☐	☐	
Enhancing my career prospects	☐	☐	☐	☐	☐	
Helping me to build a case for promotion	☐	☐	☐	☐	☐	
Improving my teaching and learning profile beyond my institution	☐	☐	☐	☐	☐	
Raising my profile as a leader of teaching and/or student learning within my institution.	☐	☐	☐	☐	☐	
Changing the way I am viewed within my institution	☐	☐	☐	☐	☐	
Changing the way I am viewed externally	☐	☐	☐	☐	☐	
Encouraging me to be proud of my achievements	☐	☐	☐	☐	☐	
Encouraging me to reflect on my career	☐	☐	☐	☐	☐	
Encouraging me to record my successes	☐	☐	☐	☐	☐	
Being recognised and/or rewarded by my institution	☐	☐	☐	☐	☐	
Making me feel more valued by my institution	☐	☐	☐	☐	☐	
Other	☐	☐	☐	☐	☐	

Page 5: REALISED INSTITUTIONAL IMPACTS: In this section we explore how gaining Principal Fellowship has impacted on your institution

16. To what extent do you agree that Principal Fellowship awards mattered to the Executive leadership team of the institution where you gained your PF?

- ☐ Strongly agree
- ☐ Agree
- ☐ Unsure
- ☐ Disagree
- ☐ Strongly disagree

16.a. Please feel free to comment on your answer below

17. Does your institution recognise and reward staff for achieving their Principal Fellowship?

- ☐ Yes
- ☐ No
- ☐ Unsure

17.a. If yes, please tell us how Principal Fellows are recognised and rewarded (250 words max)

18. To what extent do you agree with the following statements about the **impact** gaining Principal Fellowship has had on your institution? (Please tick all that apply and provide examples where possible)

Since gaining Principal Fellowship my institution has...					Example
Strongly Agree	Agree	Neither agree no disagree	Disagree	Strongly disagree	

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Asked me to lead teaching and learning initiatives	☐	☐	☐	☐	☐	
Asked me to develop learning and teaching strategies and policies	☐	☐	☐	☐	☐	
Drawn on my expertise as a mentor for other aspiring Principal Fellows	☐	☐	☐	☐	☐	
Drawn on my expertise as an assessor for Principal Fellows in our institutional scheme	☐	☐	☐	☐	☐	
Not changed how it draws on my expertise in teaching and learning	☐	☐	☐	☐	☐	
Invited me to sit on internal panels/committees to develop or evaluate learning and teaching activities	☐	☐	☐	☐	☐	
Invited me to share my learning and teaching practices	☐	☐	☐	☐	☐	
Publicised its Principal Fellows widely	☐	☐	☐	☐	☐	
Viewed me as a change agent in learning and teaching	☐	☐	☐	☐	☐	
Drawn upon its Principal Fellows to consult on learning and teaching matters	☐	☐	☐	☐	☐	

Nominated me for external teaching and learning roles	☐	☐	☐	☐	☐	
Nominated me for external teaching and learning awards	☐	☐	☐	☐	☐	
Other	☐	☐	☐	☐	☐	

18.a. If you selected Other, please specify

18.b. Please provide some detail about how your institution(s) has/have engaged with you (or not) since you were awarded Principal Fellow? (250 words maximum)

Page 6: REALISED SECTOR-WIDE IMPACTS: In this section we explore how gaining Principal Fellowship has impacted the HE sector

19. To what extent do you agree that your award of Principal Fellow has impacted on the sector (Please tick all that apply and provide an example to illustrate your response)

	Impact beyond my institution					Example
	Strongly Agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	
I have been asked to lead teaching and learning initiatives beyond my institution	☐	☐	☐	☐	☐	
I act as a mentor for other aspiring Principal Fellows outside of my institution	☐	☐	☐	☐	☐	
I assess Principal Fellow applications for Advance HE	☐	☐	☐	☐	☐	
I share my learning and teaching practice widely	☐	☐	☐	☐	☐	
I act as an External Advisor for other professional recognition schemes	☐	☐	☐	☐	☐	

I use my Principal Fellowship in external funding applications	☐	☐	☐	☐	☐	
I have taken on a number of external roles in relation to learning and teaching matters	☐	☐	☐	☐	☐	
Nothing has changed since I was awarded PF	☐	☐	☐	☐	☐	
Other	☐	☐	☐	☐	☐	

19.a. If you selected Other, please specify

20. In this final question about the impact of gaining Principal Fellowship is there anything else that you would like to tell us?

Page 7: Personal information and the opportunity to engage in follow-up interviews

21. What is your age?

- ☐ 25-29
- ☐ 30-34
- ☐ 35-39
- ☐ 40-44
- ☐ 45-49
- ☐ 50-54
- ☐ 55-59
- ☐ 60-64
- ☐ 65-69
- ☐ 70-74
- ☐ 75-79
- ☐ prefer not to say

22. What is your gender, how do you identify?

- ☐ Woman
- ☐ Man
- ☐ non-binary
- ☐ prefer not to self-disclose
- ☐ prefer to self-describe

22.a. If answered prefer to self-describe, please add your reply here

22.b. **Follow-up Interviews:** This research is being undertaken in two parts. Please indicate whether or not you would like to be considered to take part in a follow-up interview about your experiences of being a Principal Fellow and the impact that you think it has on you, institutions and on the HE sector. I would be very happy to be contacted to take part in a 45 minute qualitative interview at a mutually convenient time during October 2021.

- ☐ Yes
- ☐ No

22.b.i. If yes, please provide your email address so that we are able to contact you*

*Purposeful sampling will take place to select interviewees from those that agree to be contacted. We cannot guarantee that if you include your email here that you will be selected.

Page 8: Final page - End of the survey

Thank you for your participation. We greatly appreciate your input.

We aim to disseminate the results at relevant networks such as Advance HE, SEDA etc.

If you have any further questions please contact:

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