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December 2009/06

## Good practice guidance

This guide is based on research commissioned by OFFA and carried out by Professor Claire Callender of Birkbeck, University of London and the National Institute of Economic and Social Research.

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# Good practice guide for institutions

How to increase awareness,  
knowledge and take-up of  
bursaries and scholarships

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# How to increase awareness, knowledge and take-up of bursaries and scholarships

<b>To</b>	<p>Heads of higher education institutions in England</p> <p>Heads of HEFCE-funded further education colleges</p> <p>Managers of higher education in school centred initial teacher training providers</p>
<b>Of interest to those responsible for</b>	Implementation of access agreements, Widening Participation, Finance
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## Introduction

This good practice guide looks at how higher education institutions (HEIs) can increase awareness, knowledge and take-up of bursaries and scholarships. It is based on the findings of research commissioned by the Office for Fair Access (OFFA)<sup>1</sup> and carried out by Professor Claire Callender of Birkbeck, University of London, and David Wilkinson and Rebecca Hopkin of the National Institute of Economic and Social Research in 2008/09.

The good practice is divided into six main sections:

- Promoting bursaries and scholarships
- Targeting your information and awareness-raising activities

<sup>1</sup> OFFA is an independent, non-departmental public body, established by the 2004 Higher Education Act, to ensure that the introduction of higher tuition fees did not have a detrimental effect on widening student participation.

- Providing comprehensive bursary and scholarship information
- Disseminating bursary and scholarship information
- Maximising bursary take-up
- Maximising the impact of bursaries.

From the research, it is clear that many HEIs need to do more to improve how well-informed students, their parents, and HE advisors in schools and colleges are about their institutional support. In addition, the research shows that around three in ten students believed bursaries were important in deciding where to go to university; and that around a quarter of students who had heard of bursaries reported that the amount of bursary available influenced to which university they applied. Significantly increasing the awareness of bursaries among potential applicants, particularly before they apply to higher education, is therefore key to ensuring your bursaries achieve their aims.

Within each section of the guidance, we look to illustrate the recommended good practice by giving examples of what selected 'case study' institutions (see Annex B) are doing to increase bursary awareness and take-up. We hope you find these examples helpful. Many of you may already be undertaking similar activities at your own institution but we hope that everyone will find something in this guidance that will help you take a fresh look at what you are doing and, where relevant, make improvements.

More details about the programme of research can be found at Annex A on page 14. The research summary and recommendations, along with the four reports underpinning the recommendations, can be found on our website at [www.offa.org.uk/publications](http://www.offa.org.uk/publications).

# 1. Promoting bursaries and scholarships

## The way forward

Consider if you need to:

### 1. Promote your bursaries more effectively to students, their parents and HE advisors in schools and colleges

Despite HEIs' efforts to promote bursaries, a quarter of the students and parents surveyed had not heard of bursaries even though all the students were just about to enter higher education. In addition, one in ten HE advisors in schools and colleges had not heard of bursaries, despite the key role such advisors play in giving information to potential students. Less than half of students surveyed considered themselves well-informed about bursaries.

### 2. Actively encourage potential students and their parents to seek out information about bursaries

Of those students and parents surveyed who had heard of bursaries, around a third had not looked for information about bursaries primarily because they did not know where to look, or assumed they were ineligible for a bursary.

### 3. Reconsider what you think your students know about bursaries and scholarships

HEIs over-estimated the proportion of students who said they were well-informed about bursaries.

#### What case study universities are doing

- The University of Salford runs a specific money campaign to help undergraduates understand the cost of university and the range of support available including a major focus on bursaries.

### 4. Create positive and upbeat messages about your bursaries

Media coverage of student finance can often focus on issues surrounding debt rather than the financial support on offer, and students, their parents and HE advisors in schools and colleges that took part in the research were relatively uninformed about bursaries and scholarships compared to other aspects of student finance. In addition, around a quarter of students agreed with the statement that 'bursaries are stigmatising.' Yet from the students' point of

view, as one HEI respondent remarked, 'bursaries are free money'.

#### What case study universities are doing

- Some universities use the media to promote their bursaries and scholarships to potential applicants, for example running annual media campaigns or issuing press releases.

### 5. Reap the PR value of your bursaries

While the majority of students and parents surveyed believe that 'Bursaries mean my university is investing in me', almost a quarter of students think that bursaries are paid for by the government.

## 2. Targeting your information and awareness-raising activities

### The way forward

Consider if you need to:

#### 1. Concentrate greater effort on awareness-raising activities at the pre-entry stage

Although most of the HEIs surveyed gave out information about their bursaries at all stages of the application process, they did not concentrate enough on the pre-UCAS application period. Instead, the majority focused their awareness-raising activities on students once they had started their course, well after they had decided which university to apply to. However, our student survey showed that bursaries have a greater impact on student decision-making and choice of HEI when students learn about them before submitting their UCAS application.

You should also ensure that all sources of information about your institutional bursaries are accurate, up to date and at an appropriate level of detail. From December 2009, the Student Finance Calculator service from Student Finance England will provide a comprehensive source of comparable bursary and scholarship information for applicants before they have made their application choices. This service will be very important in providing timely bursary knowledge to applicants and OFFA expects all institutions to provide clear and timely information to this service.

#### What case study universities are doing

- The University of Portsmouth runs a range of education liaison and outreach activities including the 'UP for It' programme aimed at pupils in years 5 to 13. Activities include a 'budget game' run at careers fairs, taster days and local schools and colleges (years 7 to 13). The university also produces a mini prospectus and options guide for years 7 to 11
- Newman University College has created presentations on bursaries and state financial support for use at its open days and applicant visit days. It also distributes a leaflet outlining the various sources of financial support available to students including the bursaries it offers to students on different income levels

- The University of Salford promotes bursaries in all of its enquirer and applicant newsletters.

#### 2. Avoid complacency if you subscribe to the full Higher Education Bursary and Scholarship Scheme (HEBSS)

Full-HEBSS HEIs may have succeeded in securing high bursary take-up rates. However, our student survey showed that students attending full-HEBSS HEIs were less aware of bursaries when they started their courses than those attending HEIs subscribing to the information-only HEBSS service (after controlling for a range of students' socio-economic characteristics).

#### 3. Target more bursary information and awareness raising activities at HE advisors in schools and colleges

Most HEIs surveyed targeted their information and awareness-raising activities exclusively at students. Yet, HE advisors play a pivotal role in providing information, advice and guidance to their students. For instance, just over a third of the students surveyed had found out about bursaries through their school or college. However, our survey of HE advisors showed that 11% had not heard of bursaries and did not know they existed, a quarter had not received any bursary information directly from an HEI and nearly 70% of all advisors thought 'There is not enough information about bursaries.'

#### What case study universities are doing

- The University of Nottingham holds an annual one-day event aimed at career advisors and teachers. Topics covered include bursaries and other aspects of student funding
- Queen Mary, University of London has a database of local and national contacts which it uses to disseminate a quarterly newsletter for teachers and careers advisors called 'OnQ'. The newsletter is available both online and as a hard copy, and details the bursaries offered by Queen Mary as well as giving general guidance to prospective students, for example on budgeting and making a good UCAS application

- The University of Leeds has built up a database of local and national contacts in schools and FE colleges. It sends letters and emails to these contacts detailing its bursaries and scholarships
- The Higher Education Liaison Officers Association (HELOA) has produced a pamphlet about the fees, bursaries and scholarships available at all the HEIs in the Midlands. This pamphlet is distributed widely to schools, colleges and Connexions in the region.

#### 4. Distribute bursary information specifically to schools and colleges with lower HE participation rates

Potential HE students attending such institutions are more likely to qualify for bursaries. However, our survey of HE advisors showed that advisors working in such schools and colleges were less likely to receive bursary information directly from HEIs than colleagues in schools and colleges with higher HE participation rates.

#### 5. Target more bursary information and awareness-raising activities specifically at parents

Our survey of HEIs showed that only a minority directed bursary information specifically at parents or included parents in their awareness-raising activities. Yet parents can play a very important role in their children's HE decision-making and in helping them to find out about financial support and bursaries. For instance, over half of the parents surveyed who had heard of bursaries had encouraged their child to look for information on bursaries, and most had looked for bursary information with their children. Two-thirds of parents surveyed believed 'There is not enough information about bursaries.'

##### What case study universities are doing

- The University of Nottingham, in collaboration with Nottingham Trent University and New College Nottingham, and supported by Aimhigher, holds 'Family Suppers' for potential students in Year 10 and 11 and their parents. During these dinners, it hands out information about going to university including information about bursaries and student

finance. Both universities also contribute to school HE evenings aimed at parents

- The London School of Economics holds special parent sessions at its Open Day. Parents are given the name of someone they can contact after the event if they have any queries about student funding, including eligibility for bursaries
- Several case study universities' websites have sections aimed at parents that focus on student funding issues
- The University of Portsmouth holds 'drop in' funding sessions for both students and parents. It also has a parents' portal site on its website, a parents' brochure on funding, and a special income calculator for lone parent students that compares their income on social security benefits with the financial support they would receive as a student.

# 3. Providing comprehensive bursary and scholarship information

## The way forward

Consider if you need to:

### 1. Check there are no gaps in your bursary and scholarship information

The HEIs surveyed believed their bursary information told students everything they needed to know. However, the student, parent and HE advisor surveys revealed gaps in the material produced by some HEIs. We suggest you check there are no gaps by actively encouraging feedback from your target audiences, particularly prospective and current students and student unions.

### 2. Give clearer information on who qualifies for a bursary

The majority of students, parents, and HE advisors surveyed believed that 'It is difficult to understand who can get a bursary', especially students receiving partial government-funded maintenance grants. In addition, the majority of students surveyed did not realise that 'Universities charging the maximum tuition fee must give students getting a full grant a bursary'.

### 3. Review the information you provide about the value of your bursaries

About half of the students and parents surveyed had inaccurate expectations about the amount of bursary they, or their child, would receive. In addition, parents and HE advisors were least likely to know about the value of bursaries compared with other facts about bursaries.

### 4. Provide clearer information about when students will receive their bursary

Many of the students, parents, and HE advisors surveyed reported that there was inadequate information about this. They also said there was inadequate information about whether receiving a bursary affected students' eligibility for government-funded financial support.

### 5. Modify the language you use to describe bursaries

Our student survey found that 26% of students believed that 'To receive a bursary is stigmatising'

while 40% thought that 'To receive a scholarship is stigmatising'. HEIs need to be aware of this and avoid dwelling too much on 'financial hardship' when describing bursaries as some students may find this off-putting.

### 6. Make it clearer that bursaries are paid throughout a student's time at university or college

It's important students know they will receive a bursary each academic year, where this is the case, so they can budget properly. Over half of students surveyed thought 'Bursaries are one-off payments you receive in your first year at university' or did not know.

# 4. Disseminating bursary and scholarship information

## The way forward

Consider if you need to:

### 1. Review the bursary information on your website and in your prospectus

Our surveys of students, parents and HE advisors showed that HEIs' websites and prospectuses were very popular and the most widely used sources of information on bursaries and scholarships. Over four out of five students used an HEI source of information while nearly three out of five used an HEI website. It's therefore important that you regularly review such information to make sure it's up to date, easy to understand and access, and available at appropriate times. It's also a good idea to make sure that the most prominent pages of your website have links that take users straight to information on bursaries and student financial support so that the material is easy to find.<sup>2</sup>

#### What case study universities are doing

- The University of Nottingham has a dedicated student financial support portal on its website which includes detailed information about bursaries. It also has a tool that allows potential students to work out whether they are eligible for a bursary before they apply to the university
- The University of Portsmouth has developed a 'Student Finance Centre' section on its website ([www.port.ac.uk/departments/studentssupport/studentfinancecentre](http://www.port.ac.uk/departments/studentssupport/studentfinancecentre)), with its own home page and an online interactive budget planner so that prospective students can work out the funding and support they can expect. Other content includes a 'Jargon buster' section, to help students understand some of the terms used relating to student finance. Portsmouth also has a dedicated email address on its website for bursary queries
- Some case study universities provide bursary information as downloadable podcasts

- Nearly all the case study universities emphasise the importance of evaluating the effectiveness of diverse channels and methods for disseminating bursary information and not relying solely or exclusively on the web.

### 2. Use a variety of channels to disseminate your bursary information

Our student survey showed students used a range of sources to find out about bursaries. Only about a quarter of students received a pamphlet or booklet about bursaries but this was seen as the second most useful HEI source of information after HEI websites. Well over a third of students who had obtained a pamphlet or booklet rated it as the most helpful source. Websites were rated even more highly – three-quarters of students who had used an HEI website thought it the most helpful source. Open Days, however, are regarded less favourably. Less than a quarter of students who obtained information at an Open Day rated this source of information as the most helpful source.

#### What case study universities are doing

- Every April, the University of Portsmouth sends both new and continuing students information on tuition fees, student support and bursaries. And its Fresher packs for new students include stand-alone pamphlets and booklets on tuition fees and bursaries.

### 3. Explore the potential for using students' existing networks and social networking sites

The way that young people are communicating is changing and this is another way of reaching your target audiences.

#### What case study universities are doing

- Newman University College has a Facebook group site which includes material on student

<sup>2</sup> For more guidance on presenting bursary information on the web, see our previous guidance published by Ipsos MORI at [www.offa.org.uk/wp-content/uploads/2009/04/1-feb-07-offa-ipsos-mori-good-practice-guidance.pdf](http://www.offa.org.uk/wp-content/uploads/2009/04/1-feb-07-offa-ipsos-mori-good-practice-guidance.pdf)

finance. The material is put on the Facebook profile so that it does not get lost, as information can on social network groups. It also has a student finance discussion forum where people can either post a question they don't mind other people seeing or email [finance@newman.ac.uk](mailto:finance@newman.ac.uk) for a personal and private reply. In the future, the university college intends to use the questions posted on its Facebook site to generate content for a new Frequently Answered Questions section on its institutional website

- UCAS uses Twitter to provide updates about applying for higher education and where to go for more information  
[http://twitter.com/ucas\\_online](http://twitter.com/ucas_online)

#### 4. Make sure that all staff who have contact with applicants and students are able to disseminate information about bursaries

You may be missing opportunities to improve bursary take-up if you restrict information and awareness-raising activities solely to staff working in financial support roles.

##### What case study universities are doing

- At University College Falmouth, staff responsible for student financial support meet regularly with staff in Admissions, Finance and Fees, Widening Participation, Marketing, the Student Union, and academics to ensure they have up-to-date information on bursaries and are able to tell students about them. Feedback from Widening Participation staff led to the introduction of financial support information targeted at student parents and care leavers.

#### 5. Develop closer links with student unions to disseminate information about your bursaries

Universities that organise joint events with their student union reported improved awareness and take-up of bursaries.

##### What case study universities are doing

- Several case study universities have developed very close ties with their student unions and have organised a number of joint events. For example, one student union ran articles about bursaries in its student paper
- To help raise awareness of bursaries, the student union at the University of Reading erected a stand for a week outside their building with large posters saying 'Piggy Bank – are you getting your share?' It also distributed chocolate money. As a result, bursary take-up rates increased immediately.

#### 6. Involve existing students in activities to disseminate bursary information

Word of mouth can be a highly effective way of disseminating bursary information.

##### What case study universities are doing

- University College Falmouth organised a training day on financial support for their student mentors so that they could spread the word about bursaries to other students. To highlight the value of their bursaries, they gave examples showing how many hours of paid work they were equivalent to
- In 2008/09 the University of Portsmouth Business School ran a 10 credit 'Personal Finance' course which contributed to a student's degree. The course included debt counselling so that students could qualify as debt advisors
- The University of Leeds has a formal contract with some of its scholarship holders requiring them to participate in case studies and surveys about financial support, and help to promote the university's scholarships by, for example, working as summer school hosts.

#### 7. Actively engage with external organisations to help spread the word about bursaries

Partnerships with external organisations can help you reach particularly vulnerable students such as care leavers.

### What case study universities are doing

- The University of Portsmouth and the University of Nottingham have bursaries aimed at care leavers and Foyer residents. They have made sure that both the local social services and Foyer Federation are aware of the bursary scheme and additional support available. This additional support includes a named contact at the university's Student Services who contacts each student every term to ensure the student is receiving all the support they need. As a result, retention rates among this student group are high.

# 5. Maximising bursary take-up

## The way forward

Consider if you need to:

### 1. Change your bursary information so that students know as soon as possible how to apply for their bursary

It's important students know how to apply for a bursary – even if their bursary will be processed automatically through HEBSS. Only 51 per cent of students surveyed who had heard of bursaries had been told how to apply for a bursary by the HEI they hoped to go to. In addition, only half of students with a confirmed place had been told how to apply for a bursary.

#### What case study universities are doing

- The University of Portsmouth offers would-be students and their parents help with filling in their PN1 form. The university also makes sure that EU students know how to apply for bursaries. It provides guidance notes for EU students on its website setting out how to apply for a bursary via the SLC using form EU9N.

### 2. If you subscribe to the full HEBSS service, make it clear that students do not need to apply for a bursary

Students surveyed who attend full HEBSS HEIs were far less likely to have been told how to apply (49%) than those at non-HEBSS HEIs (63%), and information-only HEBSS HEIs (57%). As a result, students at full HEBSS HEIs are often confused about whether or not they have to apply, and if so, how to do so. Institutions using the HEBSS service must be clear about how and when payments will be made.

### 3. Let students know earlier whether they qualify for a bursary and if so, how much they will receive

Early knowledge helps students in their financial planning. A third of students surveyed who had applied for a bursary or who had an automatic application had not yet been told whether they would receive a bursary. And yet these students were surveyed in October 2008, when they were about to start their studies.

In some cases, bursaries or scholarships may not be awarded until later in the year – for example, where the bursary is linked to retention or achievement. In these cases, it is incumbent on institutions to be transparent about how these awards operate. For example, where there are discretionary awards, institutions need to be clear about how many awards are offered and what the criteria for receipt of the awards are.

#### What case study universities are doing

- The London School of Economics emails all students who have been offered a place explaining the importance of agreeing to 'consent to share' the financial information they give in their PN1 application form for government-funded student support
- Students at the University of Nottingham (a subscriber to the information-only HEBSS service) can apply on-line for a bursary, providing their bank account details so they can be paid directly.

### 4. Monitor bursary take-up rates for students across all years

This is important because of the high proportion of students surveyed who thought that bursaries were one-off payments given to first year students only.

#### What case study universities are doing

- Monitoring at the London School of Economics revealed that bursary take-up was lower among its second year students than its first year students. This was because some students did not realise that they could get a bursary throughout their time at university while others did not realise they had to re-apply for their bursary every year. As a result, LSE now distributes bursary flyers at registration events for second year students
- The University of Portsmouth cross-matches students who received a HEBSS bursary in their first year to see if they are receiving a bursary in their second year. If not, and the reason can not be detected, it contacts the relevant students via email. Portsmouth continues this

cross-matching exercise in third and subsequent years to make sure eligible students are receiving their bursaries.

## 5. Contact students who may be eligible for bursaries but have not collected them, and encourage them to apply

Careful detective work can help you identify eligible students who are not claiming their bursary.

### What case study universities are doing

- University of Portsmouth matched its Attendance Confirmation Form with its HEBSS data to identify students who were not getting a bursary but might qualify. It pinpointed which students had not consented to share their financial information and which students had not applied for means-tested financial support. Armed with this information, it contacted students by email, following this up with letters sent to their parental home at the start of the vacation
- Most case study universities found that personalised and tailored letters produced a better response from students (often with the help of parental encouragement) than all-student emails or letters. For example, University College Falmouth found that personalising communication by, for example, indicating the likely bursary amount available, improved uptake
- The University of Leeds reported that text messaging had proved an effective way to contact students who might be eligible for bursaries but had not collected them.

## 6. Identify eligible students who may be missing from your HEBSS data

You may have students who are still eligible for a bursary even though they don't appear in your HEBSS data.

### What case study universities are doing

- The University of Portsmouth identified that students taking a second first degree and students who had not applied for a student

loan were not included in their HEBSS data. However, they realised that these students might be eligible for a Portsmouth bursary because they were being charged the maximum tuition fee. Having identified who these students were, they obtained information on their household income and then paid eligible students a bursary.

## 7. Advertise your bursaries more widely around your institution and at student events

Despite all your efforts, some students may still be unaware that they are eligible for a bursary or need to reapply if they are a continuing student.

### What case study universities are doing

- The University of Nottingham and other case study universities arrange for a bursary reminder to appear as the 'message of the day' when students log on to a university computer
- Several case study universities advertise their bursaries on plasma screens and message boards around the campus and display bursary leaflets, postcards and posters in libraries and student halls of residence
- First year students at the University of Nottingham and University of Portsmouth are required to attend a registration event at which Student Services staff hand out information about bursaries
- The University of Portsmouth holds a money advice week during which it gives students taster debt counselling sessions and general information about student funding. External speakers include representatives from the Citizens Advice Bureau, DebtWizard.com, and county court. Portsmouth's student services, like other case study universities, also offer students one to one drop-in sessions on issues such as debt counselling and money management as well as mini workshops.

# 6. Maximising the impact of bursaries

## The way forward

Consider if you need to:

### 1. Think about the consequences for widening participation of allocating scholarships purely on the basis of merit

Evidence from previous research suggests that scholarships allocated solely on the basis of merit rather than a combination of merit and financial need tend to benefit middle and higher income students who may not need additional financial support to attend university.

#### What case study universities are doing

- Queen Mary, University of London abandoned its very generous merit-based scholarship after realising it was not going to students in financial need. Instead, it used the money to improve the bursaries offered to low-income students.

### 2. Think about whether you could simplify the rules, regulations and eligibility for your bursaries and scholarships

Well over half of the parents and HE advisors in schools and colleges surveyed believe that 'Bursaries are too complex.' In addition, around a quarter of the HEIs surveyed themselves believe that the confusing and complicated nature of bursaries and scholarships is a key reason for students' lack of bursary awareness and take-up. Our survey of HEIs shows that around a quarter have six bursary schemes or more, so it's worth considering whether you should rationalise the number of your schemes and simplify eligibility criteria.

#### What case study universities are doing

- The University of Reading reduced the number of income thresholds bands for its main bursary to make the scheme easier for students to understand.

### 3. Give further consideration to the amount of bursary you offer

Our student survey indicates that the larger the bursary on offer, the more likely it is to influence student decision making about which university to

attend. Specifically, students expecting to receive a bursary of £1,000 or more were more likely than students receiving less than this to be influenced by the amount of bursary when deciding which university to attend (once other student characteristics were controlled for).

#### What case study universities are doing

- The University of Leeds conducted research to evaluate the impact of its bursaries and scholarships. As a result of the research and feedback from students receiving scholarships, they decided to increase the value of larger scholarship awards from £1,000 to £2,000 for all recipients.

### 4. Evaluate rather than just monitor the impact of your bursaries and scholarships to ensure that they meet the needs of your institution and its students

HEIs are investing heavily in bursaries and scholarships, spending from 6% to 48% of their additional tuition fee income on financial support for low-income students. Yet, our HEI survey found that while many institutions had monitored their bursaries they had not evaluated them by, for example, research or student surveys. Consequently, they were unable to assess the effectiveness of their bursary schemes and to make informed decisions about any changes required. Consider also if you need to evaluate the effectiveness of different ways of promoting bursary awareness and take-up so you can alter your strategy if necessary.

#### What case study universities are doing

- The University of Reading includes a question in its annual student survey about the impact of bursaries on student choices
- The University of Nottingham has carried out several student surveys to assess the effectiveness of its bursaries. The survey results have informed and influenced the amount of bursary Nottingham offers, its income thresholds for eligibility and the way it administers and publicises bursaries.

- The University of Leeds carried out research showing that 42% of bursary and scholarship holders had been influenced by the availability of bursaries in their decision to progress to higher education. More than half said bursaries and scholarships had some influence on their decision to study at Leeds, especially those receiving larger awards. However, a sizable proportion of students had decided to study at Leeds before they knew whether they would be eligible to receive a bursary. There was also some evidence to suggest that retention rates were higher for bursary and scholarship holders, and that these students spent less time in part-time jobs and spent more time studying.

## 5. Use standard terminology to describe your institutional support

Students, parents, and to a lesser extent HE advisors in schools and colleges surveyed for OFFA were confused about the eligibility criteria associated with bursaries and scholarships because of the terminology used to describe them. For example, a third of students thought bursaries were given to students studying certain subjects. In addition, around two-thirds of parents and HE advisors believed 'It is difficult to understand the difference between bursaries and scholarships' and slightly fewer thought 'The language used to describe bursaries is confusing'. To aid clarity, we would expect to see clear descriptions of terminology, where used, and suggest you use 'bursaries' to describe means-tested financial help and 'scholarships' to describe financial aid based on merit.

# Annex A

## What the research programme consisted of

The research programme<sup>3</sup> on which this good practice guide is based consisted of:

- Interviews with key **stakeholder organisations**.
- A telephone survey of **74 HEIs** all of which were charging the maximum tuition fees. The survey was conducted between October and December 2008. Follow-up in-depth case studies were undertaken with nine of these HEIs between March and July 2009.<sup>4</sup>

The survey sought to explore the strategies and actions HEIs had undertaken to increase the awareness and take-up of their institutional bursaries and scholarships. The case studies aimed to collect more detailed information on examples of good practice.

- An online survey of a nationally representative sample of just under **5,000 students** in receipt of a full or partial grant who are the key (but not the sole) beneficiaries of bursaries. The survey was conducted in October 2008 just as the students were about to start university for the first time.<sup>5</sup>

The survey examined students' awareness and knowledge of bursaries, their information seeking behaviour, their attitudes towards bursaries, and how bursaries had influenced their behaviour and HE choices.

- A telephone survey with **114 of the students' parents** undertaken in December 2008.<sup>6</sup> The sample was broadly representative of parents with children at university whose children were aged under 21 years old, and were single and childless.

The survey explored parents' awareness and knowledge of bursaries and their attitudes towards them, and compared these with those of their children.

- A telephone survey of **150 HE advisors in schools and Further Education colleges** who were responsible for providing information, advice, and guidance to their students about going to university, including giving advice on student support.<sup>7</sup> This survey was conducted between November 2008 and January 2009.

The survey investigated HE advisors' awareness and knowledge of bursaries and their attitudes towards them and details about how they provided information on student support to their students.

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<sup>3</sup> For a summary of all the research findings see Callender, C. (2009) Awareness, Take-Up and Impact of Institutional Bursaries and Scholarships in England – Summary and Recommendations, Office for Fair Access, Bristol

<sup>4</sup> For the full report see Callender, C. (2009) Strategies Undertaken By Higher Education Institutions In England To Increase Awareness, Knowledge, And Take-Up Of Their Bursaries And Scholarships, Office for Fair Access, Bristol

<sup>5</sup> For the full report see Callender, C., Wilkinson, D. and Hopkin, R. (2009) The Impact Of Institutional Financial Support In England: Higher Education Students' Awareness, Knowledge And Take-Up Of Bursaries And Scholarships, Office for Fair Access, Bristol

<sup>6</sup> For the full report see Callender, C. (2009) Awareness And Knowledge Of Institutional Bursaries And Scholarships Among The Parents Of Higher Education Students In England, Office for Fair Access, Bristol

<sup>7</sup> For the full report see Callender, C. (2009) Awareness And Knowledge Of Institutional Bursaries And Scholarships Among Higher Education Advisors In Schools And Colleges In England, Office for Fair Access, Bristol

# Annex B

## The 'case study' institutions

We are grateful to all institutions that took part in the HEI survey, and in particular, the nine selected case study institutions that provided the examples described in this publication. The nine case study institutions are:

- University College Falmouth
- University of Leeds
- London School of Economics
- Newman University College
- University of Nottingham
- University of Portsmouth
- Queen Mary University of London
- University of Reading
- University of Salford

Our aim in selecting these institutions was to identify institutions with innovative and successful practices operating in different contexts, specifically institutions which:

- had described interesting practice on awareness and take-up in their responses to our HEI survey
- had evaluated their actions on awareness or take-up.

We also looked to secure a balance of institutions by mission group (e.g. Russell Group, 1994 group, post-92s, small) and by bursary type (for example, a spread of awards for the lowest income threshold; or differences in the maximum income threshold level).



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