

## BIROn - Birkbeck Institutional Research Online

Callender, Claire (2009) Awareness and knowledge of institutional bursaries and scholarships among higher education advisors in schools and college in England. Bristol, UK: Office for Fair Access. ISBN 9780956433633.

Downloaded from: <https://eprints.bbk.ac.uk/id/eprint/11393/>

*Usage Guidelines:*

Please refer to usage guidelines at <https://eprints.bbk.ac.uk/policies.html>  
contact [lib-eprints@bbk.ac.uk](mailto:lib-eprints@bbk.ac.uk).

or alternatively

**AWARENESS AND KNOWLEDGE OF  
INSTITUTIONAL BURSARIES AND  
SCHOLARSHIPS AMONG HIGHER EDUCATION  
ADVISORS IN SCHOOLS AND COLLEGES IN  
ENGLAND**

**A Report to the Office for Fair Access**

**Prof. Claire Callender  
Birkbeck, London University**

**June 2009**

## **Alternative formats**

The publication can be downloaded from the OFFA web-site ([www.offa.org.uk](http://www.offa.org.uk)) under 'Publications'. For readers without access to the internet, we can also supply it on 3.5" disk or in large print. Please call 0117 931 7171 for alternative format versions.

Published by the Office for Fair Access

© OFFA 2009

The copyright for this publication is held by the Office for Fair Access (OFFA). The material may be copied or reproduced provided that the source is acknowledged and the material, wholly or in part, is not used for commercial gain. Use of the material for commercial gain requires the prior written permission of OFFA.

ISBN: 978-0-9564336-3-3

## **ACKNOWLEDGEMENTS**

My thanks go to a range of people and organisations that have helped with this study. First, to Jean Arnold and David Barrett at OFFA who have been supportive throughout the duration of the study. Next, I would like to thank GfK NOP who conducted the survey of HE advisors on our behalf and Nick Moon in particular. I am indebted, as always, to both David Wilkinson and Rebecca Hopkin at the National Institute of Social Research for their help and support. Finally, I thank all the advisors who took part in this survey – without their help this study could not have happened.

All the views expressed in this report are solely those of the author.

Claire Callender

Professor of Higher Education

Birkbeck, University of London

05/05/2009

## CONTENTS

Executive Summary and Recommendations.....	6
1 Introduction .....	13
1.1 Background .....	14
1.2 Aims and objectives of the research.....	16
1.3 Methodology .....	16
1.4 Terminology .....	17
1.5 Outline of the report.....	17
1.6 Characteristics of the schools, 6 <sup>th</sup> Form Colleges, and FE colleges.....	18
2 The costs of going to university .....	20
2.1 The costs of going to university .....	20
3 Awareness of bursaries .....	22
3.1 Awareness of bursaries .....	22
3.2 Reasons students are unaware of bursaries .....	22
4 Information on bursaries.....	24
4.1 Receipt of information on bursaries.....	24
4.2 Looking for information on bursaries .....	24
4.3 Sources of information on bursaries .....	25
4.4 Adequacy of information provided .....	28
4.5 Information on the amount of bursaries .....	28
5 HE advisors' knowledge and understanding of student financial support and bursaries	31
5.1 How well-informed HE advisors are about student financial support including institutional support.....	31
5.2 HE advisors' understanding of bursaries .....	34
5.3 HE advisors' knowledge of bursaries .....	36
6 HE advisors' attitudes to bursaries .....	41
7 Providing information on bursaries to students AND the impact of bursaries on student decision making.....	44
7.1 Providing students with information on student funding and bursaries.....	44
7.2 The impact of bursaries on student decision-making.....	47
7.3 The role of HE advisors and bursaries .....	50

## **TABLES**

Table 1.1 Proportion of students entering higher education by type of educational institution .....	19
Table 3.1 HE advisors' perceptions of the reasons students are unaware of bursaries (multi-code) .....	23
Table 4.1 Amount of information provided on bursaries .....	29
Table 4.2 Clarity of information provided on bursaries .....	30
Table 5.1 HE advisors' assessment of how well-informed they were about student financial support .....	31
Table 5.2 HE advisors' assessment of how well-informed their students were about student financial support .....	33
Table 5.2 HE advisors' assessment of how well-informed their students' parents were about student financial support.....	33
Table 5.3 Statements about bursaries .....	38
Table 6.1 HE advisors' views about bursaries .....	43
Table 7.1 When HE advisors provide their students with information on student financial support .....	45
Table 7.2 When HE advisors provide their students with information about bursaries .....	46

## **FIGURES**

Figure 2.1 Proportion of students whose HE decisions influenced by the costs of going to university .....	21
Figure 4.1 Sources of information used to find out about bursaries (multi-code).....	26
Figure 4.2 Most useful source of information on bursaries.....	27
Figure 5.1 How HE advisors describe a bursary (multi-code) .....	35
Figure 5.2 How HE advisors describe a scholarship (multi-code) .....	36
Figure 5.3 HE advisors' knowledge of bursaries –answered correctly .....	39
Figure 5.4 HE advisors' misunderstandings about bursaries – answered incorrectly .....	39
Figure 5.5 HE advisors' ignorance about bursaries – did not know answer .....	40
Figure 7.1 Type of information about bursaries HE advisors give their students .....	47

## EXECUTIVE SUMMARY AND RECOMMENDATIONS

This report is based on a survey of 150 higher education (HE) advisors in schools, 6<sup>th</sup> form colleges and general Further Education Colleges in England. The survey was commissioned by the Office for Fair Access (OFFA) and undertaken by Professor Claire Callender of Birkbeck University of London, and the National Institute of Economic and Social Research. The survey forms part of a larger programme of research conducted for OFFA, which aimed to explore Higher Education Institutions' (HEI) strategies for improving the awareness and take-up of institutional bursaries and scholarships in England, and to examine students', their parents', and HE advisors' awareness of bursaries.

Bursaries and scholarships, funded by HEIs, were part of a larger package of student finance reforms established in England in 2004 through new regulations and the 2004 Higher Education Act. These changes introduced variable tuition fees for full-time undergraduates and the re-instated maintenance grants for low-income students. HEIs charging tuition above the maximum maintenance grant (£2,835 in 2008/09) were obliged to give low-income students a minimum bursary (£310), and could give these and other students additional discretionary financial support.

The financial aid an HEI offers students forms part of an Access Agreement that HEIs must submit to OFFA. 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.

The survey consisted of telephone interviews with 150 HE advisors in schools and FE colleges in England, namely, those responsible for providing information, advice, and guidance to their students about going to university, including information about student financial support. This could be a teacher, a careers or guidance advisor, someone in student services, or another member of staff. The sample of schools and sixth form colleges from which these individuals were drawn were selected from Edubase - the Department for Children, Schools and Families' database of registered educational establishments, while the Further Education Colleges were selected from a special data run undertaken by the Learning and Skills Council. For each of the three institution types the sample was stratified by region, and a sample selected with a probability proportional to size. Institutions that contracted out their advisory services were excluded from the sample. The interviewing took place at the end of the Christmas term 2008 and the start of the spring term 2009 – when many advisors were engaged with UCAS applications.

Some of the key findings are as follows:

### **The costs of going to university**

- 89 per cent of HE advisors said the costs of going to university had influenced their students' decision about whether or not to go to university. Most often they thought that up to a quarter of their students had been influenced in this way.
- HE advisors working in schools or colleges with lower HE participation rates (less than 75% of pupils in year 13 or students taking A levels or equivalent in colleges) were more likely

than those with higher rates (75% or more) to report their students were influenced in this way (93% compared with 84%).

- 75 per cent of HE advisors said the costs of going to university had affected which university their students chose and what they studied at university. Most often they thought that up to three-quarters of their students were affected in this way.
- 96 per cent of HE advisors said that they were well-informed about the cost of going to university.
- 92 per cent of HE advisors thought their students were well-informed about the cost of going to university while 75 per cent believed that parents were knowledgeable about these costs.
- HE advisors tended to over-estimate how well-informed their students were about the costs of going to university. Consequently, they may not be providing their students with a sufficient amount of information, which in turn, could impact on their students' HE decision-making.

### **Awareness of bursaries**

- 89 per cent of HE advisors had heard of bursaries.
- Although only 11 per cent of HE advisors had not heard of bursaries, this figure is worrying given their pivotal role in providing potential students with information about student funding.
- HE advisors working in schools or colleges with high HE participation rates were less likely than those with low rates to have heard of bursaries.
- HE advisors most frequently thought students were unaware of bursaries because they lacked information on bursaries (47%) and did not read the information they were given (37%).

### **Information on bursaries**

- Three-quarters of HE advisors who had heard of bursaries, had received information about bursaries for undergraduates in the last 12 months - most often in a booklet or pamphlet from an HEI
- HE advisors working in schools and colleges with high HE participation rates were more likely to have received such information compared with those working in institutions with lower HE participation rates (78% compared with 68%). Consequently, HE advisors in institutions with low participation rates had to be more proactive in their search for information on bursaries, despite the fact that more of their students were likely to qualify for bursaries
- 62 per cent (N=83) of HE advisors who had heard of bursaries, had personally looked for information specifically on bursaries. There were no differences in search behaviour by the proportion of students continuing on to higher education.
- The main reasons 38 per cent of HE advisors had not looked for information were because:
  - they had left the task to their students and/or their parents;
  - they did not know have time- there are too many other things to think about; and
  - their students did not ask them about bursaries.
- Of those HE advisors who had looked for information, nearly three-quarters found it easy to find out about them but few (16%) found it very easy.



## **Sources of information on bursaries and their adequacy**

- HE advisors relied heavily on websites, rather than printed matter.
- In fact, all 83 HE advisors referred to HEI websites and over a half rated this as the most useful source of information too. The majority of HE advisors also had looked at the websites of UCAS (N=68), Student Finance Direct (N=53) and Directgov (N=52).
- HE advisors used far more diverse sources of information on bursaries than either the students surveyed for OFFA or their parents.
- None of the HE advisors thought that too much information was provided about the different aspects of bursaries by the most useful information sources – primarily HEIs' websites.
- Over half the HE advisors reported that just enough information was provided and that it was clear, except in relation to whether the receipt of bursaries would affect a students' eligibility for government-funded financial support, and when students would receive their bursary.
- The vast majority (N=71) HE advisors who had looked for information on bursaries had not found out which HEI would give their students the largest bursary, and therefore could not direct students to HEIs offering the most generous financial support.

## **How well-informed HE advisors were about student support including bursaries and their perceptions of students and their parents' knowledge**

- The majority of HE advisors surveyed rated themselves as well-informed about all the different types of student financial support available, both government and non-government funded.
- HE advisors were least well versed about bursaries and scholarships compared with all other student funding sources.
- HE advisors thought the majority of their students were well-informed about both government and institution-funded financial support but that students were least well-informed about bursaries and scholarships.
- HE advisors significantly over-estimated the proportion of students who they thought were well-informed about bursaries (67% of HE advisors compared with 47% of students) and scholarships (52% compared with 32%) when compared with students' own assessment of their knowledge on institutional financial support. This could affect the amount of information HE advisors provide their students, and in turn, their students' decision-making about HE.
- HE advisors thought the majority of their students' parents were well informed about government-funded student support but were poorly informed about bursaries and scholarships.

## **HE advisors' understanding of bursaries**

- Nearly all HE advisors said that they understood what was meant by a bursary.
- Traditionally, bursaries are awarded to students based on their family income while scholarships are awarded on merit. However, HEIs do not always make this distinction in the names they give to their institutional support which can be confusing. Three-quarters of HE

advisors knew bursaries were awarded based on family income while over 90 per cent believed scholarships were allocated on student achievement.

- Not all HE advisors' understanding of the eligibility criteria for bursaries and scholarships matched the 'traditional' definitions.
- HE advisors tended to over-estimate how frequently bursaries are allocated on the basis of the subject a student studies and whether they attend their local HE institution.
- A more objective measure of HE advisors' knowledge found that on the whole they were knowledgeable about bursaries but a sizable minority was confused or ignorant about some key bursary facts.
- The vast majority of HE advisors knew that:
  - bursaries are non-repayable (99%);
  - the amount of bursary a student can get varies from one university to another (93%); and
  - bursaries are available not only to students in receipt of a full maintenance grant (84%).
- HE advisors were misinformed about certain facts about bursaries and at least a quarter believed incorrectly that:
  - bursaries are paid only to students from low income families (26%);
  - the amount of bursary a student can get can not vary depending on the subject a student studies (26%);
  - bursaries are paid for by the government (25%); and
  - bursaries are one-off payments paid only to students in their first year (25%).
- HE advisors were least likely to know that:
  - the minimum bursary given to students on a full grant is £310 (43%); and
  - the average bursary for a low-income student is around £1,000 a year (31%).

### **Attitudes to bursaries**

- HE advisors had similar attitudes towards bursaries.
- Over a half agreed with the following statements which are indicative of the problems they faced in getting information about bursaries and understanding that information:
  - *It is difficult to understand the difference between bursaries and scholarships* (70%)
  - *Bursaries are not important in students' decisions about where to go to university* (69%)
  - *There is not enough information about bursaries* (69%)
  - *It is difficult to understand who can get a bursary* (65%)
  - *The language used to describe bursaries is confusing* (61%)
  - *Bursaries are too complex* (59%)
- Advisors also recognised the benefits of bursaries with over half disagreeing to the following statements:
  - *To receive a scholarship is stigmatizing* (96%)

- *To receive a bursary is stigmatizing (93%)*
- *Students' parents do not want their children to get a bursary (93%)*
- *The parents of our students know more about bursaries than their children (89%)*
- *Only low-income students should get bursaries or scholarships (80%)*

### **Providing students with information on student funding and bursaries**

- All the HE advisors gave some information, advice, and guidance to their students about the different types of student funding available with three-quarters offering it before their students had submitted their UCAS application form but this advice did not always include information on bursaries.
- Of those HE advisors who had heard of bursaries (N=113), the vast majority (94%) had given their students information, advice, and guidance specifically about bursaries.
- HE advisors in schools and colleges with high HE participation rates were more likely than their colleagues in educational institutions with lower HE participation rates to provide their students with information on bursaries (68% compared with 47%).
- Of the HE advisors who had offered students information and advice on bursaries, a half had provided it after their students had submitted their UCAS application form – so this information was unlikely to impact on their students' HE decisions.
- Most HE advisors who gave their students information on bursaries only provided a minimal amount of information and did not discuss bursaries in any detail with their students.
- The majority (84%) of HE advisors who gave their students advice and guidance about bursaries, told their students how and where to get information on bursaries.
- Only about a third provided their students with some fundamental facts about bursaries such as: how to apply for bursaries; whether or not they are eligible for a bursary; and how bursaries vary from one university to another.
- Clearly, there was an expectation amongst HE advisors, that students should look for detailed information about bursaries themselves, but the OFFA student survey revealed that a large minority did not find about them or seek out information about bursaries.

### **The impact of bursaries on student decision making**

- Most HE advisors (69%) did not think bursaries were important in students' decisions about where to go to university.
- HE advisors were divided about whether bursaries, and the amount of bursary a student could get, influenced their students' HE decisions.
- Some HE advisors thought that bursaries encouraged students to go to university; helped in students' decision making so they opted for HEIs paying larger bursaries or affected a student's decision whether to go to a local HEI.
- HE advisors who thought that bursaries had little or no impact on students' decision recognised the importance of financial support but most frequently suggested that other issues apart from bursaries were more important in students' decision making such as the reputation of the HEI, its location, and the courses on offer.
- Only 62 per cent of HE advisors were well placed (i.e. were aware of bursaries, had looked at or received information on bursaries, and had provided their students with bursary

information either before they submitted their UCAS application or once offered a place at university) to shape their students' deliberations about bursaries, and hence the potential for bursaries to influence their students' decisions about what and where to study.

## **RECOMMENDATIONS**

### **HE advisors**

- HE advisors should not make assumptions about how well-informed their students are about the costs of going to university and should provide their students with a sufficient amount of information, to help inform their students' HE decision-making.
- HE advisors need to be more proactive in getting information about bursaries so that they are aware of them and knowledgeable about them, especially those advisors working in schools and colleges with lower HE participation rates.
- HE advisors need to ensure their students are furnished with information on bursaries to help raise student awareness of bursaries.
- HE advisors should not assume that students or their parents look for information on bursaries as 30 per cent of students and 37 per cent of parents did not.
- HE advisors need to ensure that they do not make assumptions about the extent of students' knowledge about bursaries and scholarships, and to provide their students with more information so that they are well-informed about them.
- HE advisors need to familiarize themselves with the eligibility criteria used by HEIs to disburse both bursaries and scholarships and how the size of bursaries varies from one HEI to another, so as to ensure their students take advantage of the bursaries on offer.
- HE advisors should give their students information on bursaries before they submit their UCAS application form so that this information can be considered alongside students' other HE choices and deliberations – otherwise students may miss out on some financial support opportunities.
- HE advisors should consider discussing bursaries with their students in far more detail and providing them with more comprehensive information, so that their students are better informed to make judgements about the benefits of bursaries.
- Particularly, HE advisors should ensure that students understand how to get a bursary, whether they qualify for one, and how the bursaries available vary from one HEI to another.

### **HEIs**

- Improving HE advisors' awareness of bursaries and ensuring HE advisors access information on them before their students submit their UCAS application, is vital if bursaries are to help meet HEIs' enrolment goals and to widen participation.
- HEIs should ensure that their information on bursaries is widely distributed irrespective of the schools' and colleges' HE participation rates. Although HE advisors in schools and colleges with lower HE participation rates had a strong awareness of bursaries, they were much less likely to have received any information about bursaries from HEIs. Therefore, HEIs need to send all schools and colleges in their locality and beyond information on bursaries, irrespective of the proportion of students attending those schools and colleges who go on to higher education.

- HEIs are in a strong position to influence HE advisors' knowledge and awareness of bursaries because their websites were HE advisors' most popular and useful bursary information source. HEIs, therefore, need to ensure that the information provided by these sources is up to date, easy to understand and to access, and available at the appropriate times.
- HEIs should provide more and clearer information on their websites about when students will receive their bursary and whether the receipt of institution support affects eligibility for government-funded financial support.
- There are identifiable gaps in HE advisors' knowledge about bursaries that HEIs should try to address, especially about the value of the bursaries HEIs offer.

## **Others**

- Although the majority of HE advisors consulted the UCAS, Student Finance Direct and Directgov websites for information on bursaries only a minority rated them the most useful sources suggesting that these organisations might wish to review the bursary content on their website.
- Similarly the government may wish to review the information it provides on websites such as Teachernet and Aimhigher.

# 1 INTRODUCTION

The Office for Fair Access (OFFA) commissioned Professor Claire Callender of Birkbeck, University of London, and the National Institute for Economic and Social Research to undertake research to inform the production of a good practice guide for improving the awareness and take-up of institutional bursaries and financial support among undergraduate students.

The study consisted of the following:

- Interviews with key stakeholder organisations
- A survey of HEIs and follow-up in-depth case studies of HEIs<sup>1</sup>
- A survey of students starting higher education for the first time in 2008/09<sup>2</sup>
- A survey of the students' parents<sup>3</sup>
- Survey of HE advisors in schools, 6<sup>th</sup> Form Colleges and Further Education colleges

This report covers the key findings from the survey of higher education advisors in schools, 6<sup>th</sup> form colleges and general Further Education (FE) colleges namely, those responsible for providing information, advice, and guidance to their students about going to university, including information about student financial support. This could be a teacher, a careers or guidance advisor, someone in student services, or another member of staff.

Such staff can sometimes be the first port of call for students when they are thinking about entering higher education. They can play a significant role in informing potential HE students about the opportunities available and how they might pay for their time at university, including issues about the student financial support and bursaries. For example, the survey of students conducted for OFFA as part of this study showed that a third of students had first heard about bursaries through their school or college.<sup>4</sup> So HE advisors are likely to have some impact on students' awareness and knowledge of bursaries and the more informed they are, the more likely they can improve their students' awareness and take-up of the financial help on offer. However, very little research has been conducted in the UK or elsewhere which specifically explores the role of HE advisors in schools and colleges in informing potential HE students about the financial help available to help meet the costs of higher education. This study attempts to fill some of the gaps in our knowledge.

---

<sup>1</sup> Callender .C. (2009) *Higher education institutions' strategies to increase the awareness and take-up of institutional bursaries and scholarships* Office for Fair Access, Bristol

<sup>2</sup> Callender .C., Hopkin, R., and Wilkinson, D. (2009) *Higher Education Students' Awareness and Knowledge of Institutional Bursaries and Scholarships*, Office for Fair Access, Bristol

<sup>3</sup> Callender .C. and Hopkin, R. (2009) *Awareness and Knowledge of Institutional Bursaries among the Parents of High Education Students*, Office for Fair Access, Bristol

<sup>4</sup> Callender et al (2009) *op cit* Chapter 3

## 1.1 Background

The 2004 Higher Education Act, which came into effect during 2006-07, deregulated full-time undergraduate tuition fees so that HEIs in England could charge anything from £0 to £3000. In 2008/09, the maximum tuition English higher education institutions (HEIs) could charge was £3,145 a year. In 2008/09, all but a handful of HEIs were charging the maximum tuition for their first degree courses but a few were charging less for sub-degree courses (e.g. Foundation Degrees, HNCs). There was, however, considerably more variation in fees for both degree and sub-degree courses provided in the Further Education sector where less than half charged the maximum fees.

This variable tuition replaced the previous policy in which the government required all HEIs to charge a uniform flat rate of £1,200 for their undergraduate courses and gave means-tested discounts to low-income students, which were also set by the government. Under the old system, tuition costs were paid up front by students and their parents, although most low-income students paid no fees because of the means-tested discounts. In contrast, all new full-time English undergraduates, irrespective of their family's income, are now required to pay the new variable tuition amount. All these undergraduates can take out a government subsidised income-contingent loan to repay their tuition fees after graduation. In addition, government-funded means-tested maintenance grants for low-income students were re-introduced which previously had been abolished in 1998. Initially set at £1,000, the maximum was raised to up to £2,700 from 2006. Thus today, all undergraduate students can receive government subsidised income-contingent loans for both their tuition and living costs while low-income students can also receive a grant and a mandatory bursary.

While the 2004 Act gave English HE institutions (HEIs) more freedom in setting undergraduate tuition fees, HEIs that now charge tuition above £2,835 also have an obligation to provide bursaries of up to £310 to low-income students in order to supplement the government-funded grants and maintenance loans students can receive. Bursaries include financial assistance made to students mainly on the basis of financial need while scholarships are usually awarded on the basis of merit. Both forms of aid, which we call institutional financial support, are funded directly by HEIs, primarily from the additional income gained from the introduction of variable tuition.

£310 is the maximum bursary HEIs are obliged to pay low-income students. However, the government has encouraged HEIs to provide additional discretionary financial support exceeding this level to these and other students. These bursaries and the financial support an HEI offers form part of an Access Agreement that institutions who charge tuition fees of more than £1,225 must submit to the Office for Fair Access (OFFA). OFFA is an independent, non-departmental public body that was established by the 2004 Act, to ensure that the introduction of higher tuition fees did not have a detrimental effect on widening student participation. The Access Agreements set out how each HEI will "safeguard and promote fair access", especially for low-income students.<sup>5</sup>

It is important to distinguish between the mandatory and non-mandatory bursaries first introduced by HEIs in 2006-07. Mandatory bursaries of up to £310 (in 2008/09) are imposed by government for HEIs that charge tuition of more than £2,835, and must be targeted exclusively at the poorest students, defined as those in receipt of a full government maintenance grant of £2,835 - from families with household incomes of £25,000 or less. As these students are also entitled to a full grant, their tuition fees are completely covered via a combination of government grants and institutional bursaries. These criteria, and the sums

---

<sup>5</sup> Office for Fair Access (2007) "About OFFA." Accessed December 14, 2007 at <http://www.offa.org.uk/about/>

allocated, are set centrally by government – they are universal and fixed. In contrast, non-mandatory bursaries and scholarships are not compulsory nor are their eligibility criteria stipulated by government. HEIs choosing to offer them are free to design their own disbursement schemes and set their own terms and conditions, including the income thresholds for eligibility and sums allocated.

The discretionary nature of non-mandatory bursaries means that there are considerable differences in the type and scope of support offered by HEIs.<sup>6</sup> Despite the government's and HEIs' endeavours to ensure that prospective and current students are aware of the new financial arrangements, various studies and media reports suggest that students are especially unaware of bursary provision.<sup>7</sup> In addition, some have argued that bursaries are often difficult for students to understand because of their complex eligibility criteria.<sup>8</sup> Furthermore, the process set up to facilitate the take-up of bursaries and their administration - the Higher Education Bursary and Scholarship Scheme (HEBSS) - encountered some problems.

HEBSS is run by the Student Loans Company (SLC), a UK public sector organisation established to administer government-funded student loans and maintenance grants to students throughout the United Kingdom. Under the HEBSS service, a student's eligibility for their chosen HEI's bursary or scholarship scheme is automatically assessed when they apply for government-funded financial support. The aim of the service is to reduce the administrative burden of disbursing HEIs' bursaries and scholarships and to ease the bursary application process for students. However, in 2006/07 and again in 2007/08 HEBSS encountered a data-sharing problem.

In order for HEBSS (or in some cases the students' HEI) to process a student's bursary, the student had to agree to share with their HEI the financial information they provided the Student Loans Company when applying for a student grant and/or student loan. Many students did not understand this. They did not tick the "consent to share" financial information box on the student finance application form. As a result, students who were eligible for a bursary or scholarship but failed to tick the appropriate box did not automatically receive their bursary. Together these factors have resulted in a large number of bursaries being unclaimed and a significant problem of bursary take-up across the sector in their first two years of operation.<sup>9</sup>

It is against this background that OFFA commissioned research to investigate what HEIs have done to increase student awareness and take-up of bursaries, and to explore what more could be done to increase student, parent and HE advisor awareness of bursaries and thus improve take-up, and to produce a good practice guide.

---

<sup>6</sup> Callender, C (forthcoming) Bursaries and Institutional Aid in Higher Education in England: Do they safeguard access and promote fair access? *Oxford Review of Education*, 36:1

<sup>7</sup> E.g. Davies, P., Slack, K., Hughes, A., Mangan, J., and Vigurs, K. (2008) Knowing Where to Study? Fees, Bursaries and Fair Access, Institute for Educational Policy Research and Institute for Access Studies, Staffordshire University, UK; Shepherd, J (2007) Students fail to take up bursary cash *The Guardian*, Tuesday January 16, 2007

<sup>8</sup> E.g. Mitton, L (2007) Means-tested higher education? The English university bursary mess *Journal of Further and Higher Education* Vol 31:4 p373-383

<sup>9</sup> Office for Fair Access (2008) Access Agreement Monitoring: Outcomes for 2006-07 Bristol: Office for Fair Access.



## 1.2 Aims and objectives of the research

The overall aim of the study was to produce and disseminate a research-informed good practice guide to help increase the awareness and take-up of bursaries in England.

To meet this aim the study had the following objectives:

- To identify the strategies that HEIs have used to increase student and parent awareness of bursaries within the academic year.
- To identify what actions HEIs have taken to increase bursary take-up.
- To identify the messages and sources of information that have or have the potential to increase pre-applicant and applicants' awareness of bursaries generally or at a specific institution, including any evidence that institutions have of effective terminology surrounding bursary awards.
- To identify the different marketing campaigns that HEIs have used to promote their financial support packages to potential students and evaluate the comparative effectiveness of different approaches.
- To use the results of the above to produce good practice guidance to inform staff in HEIs responsible for the publicity and delivery of bursaries how they can improve awareness and increase take-up.
- To publicise the good practice guidance.

## 1.3 Methodology

For this survey the samples of schools and sixth form colleges were drawn from EduBase. EduBase is a register of all educational establishments in England and Wales, maintained by the Department for Children, Schools and Families. Only establishments in England were included in the sampling frame to reflect the focus of this study. Whilst we could be reasonably certain that all Sixth Form Colleges would have enough students going on to HE to justify having someone in the role of an HE advisor, the same is not true for schools and Further Education (FE) colleges.

As Edubase does not contain data on qualifications studied, we used the size of the sixth form as a proxy, and all schools with more than 100 pupils aged 17 and over were included in the sample.

For the Further Education colleges we commissioned a special data run undertaken by the Learning Skills Council of a list of FE providers indicating the number of 16-19 year olds at level 3 and the numbers doing 'A' levels. This was felt to be the best correlate for HE applications. Colleges were included in the sampling frame if they had 200 or more students studying for 'A' levels.

For each of the three institution types the sample was stratified by region, and a sample selected with a probability proportional to size. Quotas were set to control the number of interviews by region, though it proved impossible to meet these exactly, and a small amount of leeway was allowed.

Measured by number of institutions, a fully representative sample would have been overwhelmingly drawn from schools. Even though the total sample was too small to permit any realistic sub-analysis, a decision was taken to over sample FE colleges and Sixth Form Colleges slightly, so that some indicative conclusions could be drawn about differences.

The issued sample was 839 educational institutions with target numbers of interviews of 30 FE Colleges, 90 schools, and 30 Sixth Form colleges. The sample numbers were higher than might normally be the case because of the short field period - interviewing took place at the end of the Christmas term 2008 and the start of the spring term 2009 – when many advisors were engaged with UCAS applications.

Institutions that contracted out their HE advisory service to a third party were screened out, and this removed 5 FE colleges, 31 schools, and 8 FE colleges.

There were 60 institutions that refused to take part – 2 FE Colleges, 56 schools and 2 Sixth Form Colleges. The largest group of non-responding schools/colleges were those that asked to be called back at a later date but the quota for that type/region was filled before they were called back.

The final numbers of interviews achieved were 28 FE Colleges, 92 schools, and 30 Sixth Form Colleges.

The fieldwork was conducted by GfK NOP Research.

The survey data analysis was limited by the relatively small sample size. The base for some of the responses was small. Consequently, the findings must be treated with caution. Not all of the HE advisors surveyed were asked all the questions in the survey questionnaire. The base for the tables and graphs presented in the report therefore varies. Where the number of advisors answering a particular question is 100 or above, the data are presented as percentages, where the number is below 100 the data are presented as numbers.

## **1.4 Terminology**

As we will see, the terminology used to describe bursaries and scholarships can be confusing. Indeed, we investigated this issue in the research. Traditionally, bursaries are understood to include financial assistance made to students mainly based on financial need through some form of means testing while scholarships are often understood to mean financial support awarded solely on the basis of merit. However, in reality, some scholarships are awarded purely on financial need (e.g. Warwick University),<sup>10</sup> while others are awarded both on merit and financial need. For the sake of simplicity, both forms of support will be called institutional financial support unless specified otherwise.

## **1.5 Outline of the report**

By way of introduction, the next section examines HE advisors' general thoughts about how the costs of going to university influenced their students' decision making. Section 3 explores HE advisors' awareness of institutional bursaries and why some students are unaware of them. Section 4 focuses on information about institutional bursaries, the sources of information they used, and their assessment of its adequacy. Section 5 turns to HE advisors' knowledge and understanding of bursaries, including how well-informed they believed they, their students, and their students' parents were about various types of student financial support. Section 6 explores HE advisors' views on bursaries. The final section examines the

---

<sup>10</sup> The Warwick Scholarship of £1,800pa is offered to all students with a family income of less than or equal to £36,000 per annum who are in receipt of maintenance grant support from the UK Government.

information HE advisors provided their students and the impact and role of bursaries, especially in terms of influencing student HE choices.

Where appropriate the findings from the survey of HE advisors will be compared with those from the other surveys conducted as part of the OFFA study – namely the survey of 4,848 students, 114 of their parents, and 74 HEIs.<sup>11</sup> However, these comparisons should be treated with caution.

No socio-economic data were collected about the pupils/students at the institutions where the HE advisors worked. In all probability the socio-economic characteristics of these pupils/students differed from those of the students who participated in the OFFA student survey. Significantly, not all the pupils/students attending the HE advisors' institutions would enter higher education while all the students surveyed were attending university. Thus care must be taken when interpreting any findings that compare the HE advisors' pupils/students with those of the students participating in the student survey.

## **1.6 Characteristics of the schools, 6<sup>th</sup> Form Colleges, and FE colleges**

It was surmised that HE advisors' awareness and understanding of bursaries may be associated with the proportion of their students who continue on to higher education. Thus, HE advisors in schools were asked to specify the proportion of their pupils in Year 13 who entered higher education. HE advisors in 6<sup>th</sup> Form Colleges and general FE colleges were asked to identify what proportion of their students taking A Levels or equivalent entered higher education.

As Table 1.1 shows a far higher proportion of students attending schools entered higher education compared with students studying at colleges, especially general FE colleges. These patterns of HE participation reflect national trends, and are likely to be related to the socio-economic composition of these different educational institutions. FE colleges tend to attract more students from the lowest socio-economic groups than either schools or 6<sup>th</sup> Form colleges. And, as is well established, HE participation rates are highly correlated with students' social class. Students from the lowest socio-economic groups are five times less likely than their peers from the wealthiest backgrounds to enter higher education.<sup>12</sup>

---

<sup>11</sup> See Callender et al (2009) *op cit*; Callender and Hopkin, R. (2009) *op cit*; and Callender (2009) *op cit*.

<sup>12</sup> Department for Education and Skills (2003) *Widening Participation in Higher Education*, DfES <http://www.dcsf.gov.uk/hegateway/uploads/EWPparticipation.pdf> Accessed 10/02/2009

**Table 1.1 Proportion of students entering higher education by type of educational institution**

Type of educational institution	Proportion of students entering higher education		
	More than 75%	Less than 75%	All
	%	%	N
<b>School</b>	74	26	92
<b>6<sup>th</sup> Form College</b>	53	47	30
<b>FE College</b>	18	82	28
<b>All</b>	59	41	150

*Source:* Birkbeck Survey of HE Advisors, 2008

## 2 THE COSTS OF GOING TO UNIVERSITY

### 2.1 The costs of going to university

The majority of the HE advisors interviewed (89%) stated that the costs of going to university had influenced their students' decision about whether or not to go to enter higher education. Of those HE advisors reporting such an affect, just over a half (54%) estimated that between a handful and up to a quarter of their students had been influenced by the costs (Figure 2.1). A lower proportion of HE advisors - three-quarters - reported that the costs of going to university had affected which HEIs their students applied to or which courses they chose. Of those HE advisors reporting such an impact, three-quarters estimated that between a handful and up to a half of their students were affected in this way by the costs of going to university (Figure 2.1).

HE advisors in schools where less than three-quarters of their Year 13 pupils went on to higher education and HE advisors in colleges where less than three-quarters of their students taking A Levels (or equivalent) entered higher education, were more likely than advisors in schools and colleges with higher HE participation rates to state that the costs of university influenced their students' decisions about whether to apply to university (93% compared with 84%). In addition, more of their students were affected in this way. For example, only 12 per cent of HE advisors in institutions with lower HE participation rates (under 75%) said that just a handful of students were influenced compared with 32 per cent of HE advisors in educational institutions with higher participation rates (75% and over). However, there were no significant differences in relation to the students' decisions about where and what subject to study. Given the differing socio-economic composition of educational institutions with low participation rates, it can be surmised that students from poorer backgrounds were more likely than their more wealthy peers to be concerned about the costs of going to HE in their HE decision-making.

The HE advisors surveyed were more likely than the students surveyed as part of the OFFA study,<sup>13</sup> to report that students were influenced in their HE decisions by the costs of going to university. In the student survey, 56 per cent of students said that these costs had affected their decision about whether to apply to university while 43 per cent reported the costs had impacted on which HEIs they applied to or what courses they chose to study. These differences are not surprising. HE advisors were commenting about all their students, some of whom would not be progressing to HE for a variety of reasons, including the perceived costs of university. By contrast, all the students' surveyed were attending university and so had either not perceived, or had overcome, any perceived financial barriers to HE entry.

Nearly all (96%) of the HE advisors surveyed stated that they were well-informed about the cost of going to university. The vast majority (92%) also thought their students were well-informed about the costs while a smaller proportion (75%) believed that parents were knowledgeable about the cost of going to university. However, HE advisors in schools and colleges where under three-quarters of their students entered higher education thought parents were less well-informed about these costs than did advisors where higher proportions of their students progressed to higher education (65% compared with 84%).

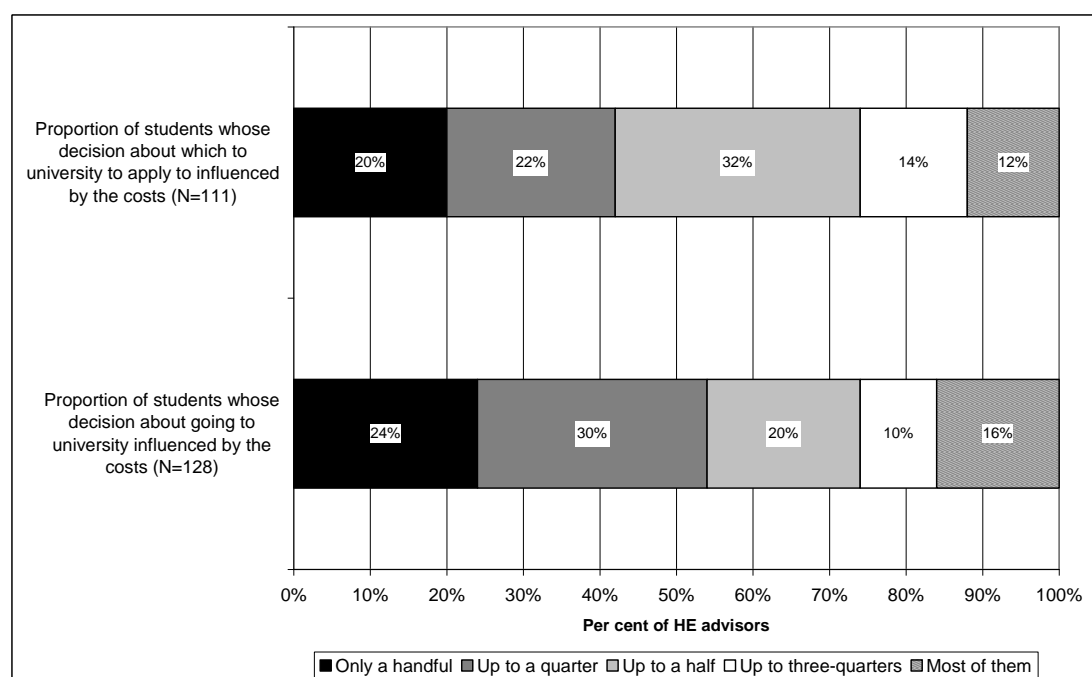
---

<sup>13</sup> As suggested in the introduction, care must be taken when interpreting any findings comparing the HE advisors' students with those who participated in the student survey.

There were some differences between HE advisors' own assessment of how well-informed they were about the costs of going to university and HEIs' perceptions of advisors' knowledge. In the survey of HEIs undertaken as part of the OFFA study, only 70 per cent of HE respondents thought that HE advisors in schools and college were knowledgeable about the costs – a difference of 26 per cent.<sup>14</sup> In other words, HEIs appear to under-estimate advisors' knowledge.

HE advisors also thought that a higher proportion of students and their parents surveyed for OFFA were well-informed when compared to students (92% compared with 88%) and parents (75% compared with 71%) own assessment of their knowledge. Although these differences are not large, arguably, they are important. HE advisors over-estimated how well-informed their students were about the costs of going to university, despite the fact that some of their students (unlike the students surveyed for OFFA) would not be entering higher education. The HE advisors were making erroneous assumptions about the level of student and parental knowledge. Consequently, they may not be providing them with a sufficient amount of information, which in turn, could impact on their students' HE decisions.

Figure 2.1 Proportion of students whose HE decisions influenced by the costs of going to university



Base: All HE advisors N=150

Source: Birkbeck Survey of HE Advisors, 2008

<sup>14</sup> See Callender, C (2009) Higher Education Institutions' strategies to increase the awareness and take-up of institutional bursaries and scholarships (Table 4.3) OFFA, Bristol

### **3 AWARENESS OF BURSARIES**

#### **3.1 Awareness of bursaries**

The vast majority of HE advisors (89%) surveyed had heard of bursaries. Somewhat surprisingly, HE advisors in schools and colleges where more than three-quarters of their students entered higher education were less likely to have heard of bursaries than advisors in schools and colleges with smaller proportions entering higher education (85% compared with 93%). These findings may be related to the socio-economic composition of the different types of educational institutions. Students attending institutions with lower HE participation rates were more likely than students attending education institutions with high participation rates to come from low-income families, and hence were more likely to be eligible for bursaries and to need additional financial support. This may help explain why HE advisors in the former types of schools and colleges were more aware of bursaries. However as we will see in the next section (4.1), HE advisors working in schools and colleges with low HE participation rates were less likely to have received bursary information directly from HEIs. Whatever the reasons for these differences, the fact that not all HE advisors were aware of bursaries, especially those working in schools and colleges where large proportions of their students enter higher education, does suggest a serious information gap.

#### **3.2 Reasons students are unaware of bursaries**

All HE advisors were asked why they thought some students were unaware of bursaries. There was no clear consensus among HE advisors as to the reasons. The most frequently mentioned reasons were:

- the lack of information (47%), and
- that students did not read the information they were given (37%).

HE advisors working in schools and colleges with HE participation rates of over 75 per cent were more likely than advisors working in institutions with lower rates to identify both lack of information and students not reading information as the key reasons for students' lack of bursary awareness.

HE advisors' opinions as to why students were unaware of bursaries differed from those of HEIs. The HEI respondents surveyed believed that the most significant reason was the complex and confusing nature of the student funding system.<sup>15</sup>

---

<sup>15</sup> See Callender, C (2009) *op cit* (Table 4.4)

**Table 3.1 HE advisors' perceptions of the reasons students are unaware of bursaries (multi-code)**

<b>Reason</b>	<b>%</b>	<b>N</b>
<b>Lack of information about bursaries/no centralised source of information</b>	47	71
<b>Students don't read the information they are given about bursaries</b>	37	55
<b>Bursaries are not promoted by universities</b>	25	38
<b>Student funding system and bursaries are too complex and confusing</b>	25	38
<b>Information about bursaries is unclear/confusing/ineffectual</b>	25	38
<b>Students are not locked in the right networks for finding out about them</b>	23	35
<b>Students don't think they are eligible for bursaries and so don't find out about them</b>	19	29
<b>Students' advisors at schools/colleges are ill informed about bursaries/universities do not provide advisors with information</b>	19	28
<b>Students not interested in bursaries /don't do enough research</b>	13	19
<b>Students have poor financial literacy</b>	12	18
<b>Bursaries/scholarships still new</b>	11	17
<b>Students not worried/concerned about their finances</b>	8	12
<b>Students don't know where to look for information</b>	5	7
<b>Other reasons</b>	11	16
<b>Base</b>		150

Base: All HE advisors

Source: Birkbeck Survey of HE Advisors, 2008



## **4 INFORMATION ON BURSARIES**

HE advisors who had heard of bursaries (N=133), were asked a series of questions about whether they had received and/or looked for information specifically on bursaries, the type and sources of information examined, and the usefulness of that information. Thus, the following section relates only to those HE advisors who were aware of bursaries.

### **4.1 Receipt of information on bursaries**

All HE advisors who had heard of bursaries (N=133), were asked if in the last 12 months they or their school or college had received any information, advice, or guidance specifically about bursaries for undergraduates. Nearly three-quarters of them had, especially those HE advisors working in schools and colleges with HE participation rates of 75 per cent and over when compared with advisors in educational institutions with lower participation rates (78% with 68%).

Of those HE advisors who had received information, they most frequently obtained the material directly from a university (98%) and from UCAS (24%). They most often obtained booklets or pamphlets on bursaries (89%) followed by posters or flyers (43%). Again, HE advisors in schools and colleges with HE participation rates of more than 75 per cent were more likely than their colleagues in schools and colleges with lower HE participation rates to report receiving booklets (95% compared with 80%) and posters (49% compared with 33%). Consequently, HE advisors in schools and colleges with lower HE participation rates had to be more proactive than those in institutions with higher HE rates in their search for information on bursaries.

Despite this, as we have seen, bursary awareness was lower among HE advisors working in schools and colleges with higher HE participation rates. These findings bring into question those from the OFFA survey of HEIs. Respondents in the HEI survey claimed that they targeted their bursary information at low-income students. However, the findings here suggest that that did not mean the information was distributed to low-income students in schools and colleges with low HE participating rates.

These findings suggest that HEIs need to broaden the dissemination of their information on bursaries to include schools and colleges with lower HE participation rates. These types of institutions are most likely to include students who: qualify for bursaries; have the greatest financial needs; and who need reassurance both about the affordability of higher education and the availability of bursaries.

### **4.2 Looking for information on bursaries**

Nearly two out of five (38%, N=50) HE advisors who had heard of bursaries, had not looked for any information specifically about them. HE advisors' behaviour was unaffected by the proportion of students at their institution going on to higher education. The main reasons HE advisors had not looked for information were:

- They had left the task of looking for information to their students and/or their parents (N=13,);
- They did not know have time- there are too many other things to think about (N=10,);
- Not asked by students (N=9,); and
- No need to look for information either because information was sent directly to them by a university or because none of their students had asked for information on bursaries (N=8,).

Some advisors may be making erroneous assumptions about whether their students or their parents look for information on bursaries and whether they need to know about them. As the findings from the OFFA surveys of students and their parents show, 30 per cent of students surveyed who had heard of bursaries and 37 per cent of parents had not looked for information on bursaries.<sup>16</sup>

Around three in five HE advisors (N=83) reported they had looked at information specifically on bursaries. And most of them (N=64,77%) had also received information directly from a university. Nearly three-quarters (N=60,72%) of those that had looked for information, had found it easy to find out about bursaries but only a small minority (N=13,16%) had found it very easy. HE advisors at institutions with lower HE participation rates (under 75%) were more likely than advisors in institutions with higher participation rates (75% and over) to say it was difficult to find information (33% compared with 23%). This is perhaps not surprising, given they were less likely to receive information directly from an HEI and had to be more proactive in their search.

### 4.3 Sources of information on bursaries

The HE advisors surveyed used a variety of sources to find out about bursaries (Figure 4.1). They were particularly reliant on websites, rather than printed matter. All of them referred to university websites and over a half (N=44;53%) rated this as the most useful source of information too (Figure 4.1 and 4.2). The majority of HE advisors also had looked at the websites of UCAS (N=68;82%), Student Finance Direct (N=53;64%) and Directgov (N=52;63%).<sup>17</sup> When they did consult other media, they relied on information sources provided directly by HEIs, such as a pamphlet produced by an HEI (N=49;59%), a talk given by a member of staff from a university (N=48;58%), or a university prospectus (N=45;54%).

HE advisors used far more diverse sources of information on bursaries than either the students in the OFFA survey or their parents.<sup>18</sup> HEI websites were similarly most frequently used by both students and their parents when seeking information about bursaries and were considered the most useful source of information. However, both students and their parents rarely used other websites to find out about bursaries, especially the UCAS website.

These findings suggest that HEIs are in a strong position to inform HE advisors about their bursaries and to ensure that they are well-informed, as HEIs have control over the source HE advisors most frequently used and considered the most helpful source. However, the findings also suggest the information provided on the UCAS, Student Finance and Directgov websites may need to be improved. While the vast majority of HE advisors used these websites only a

---

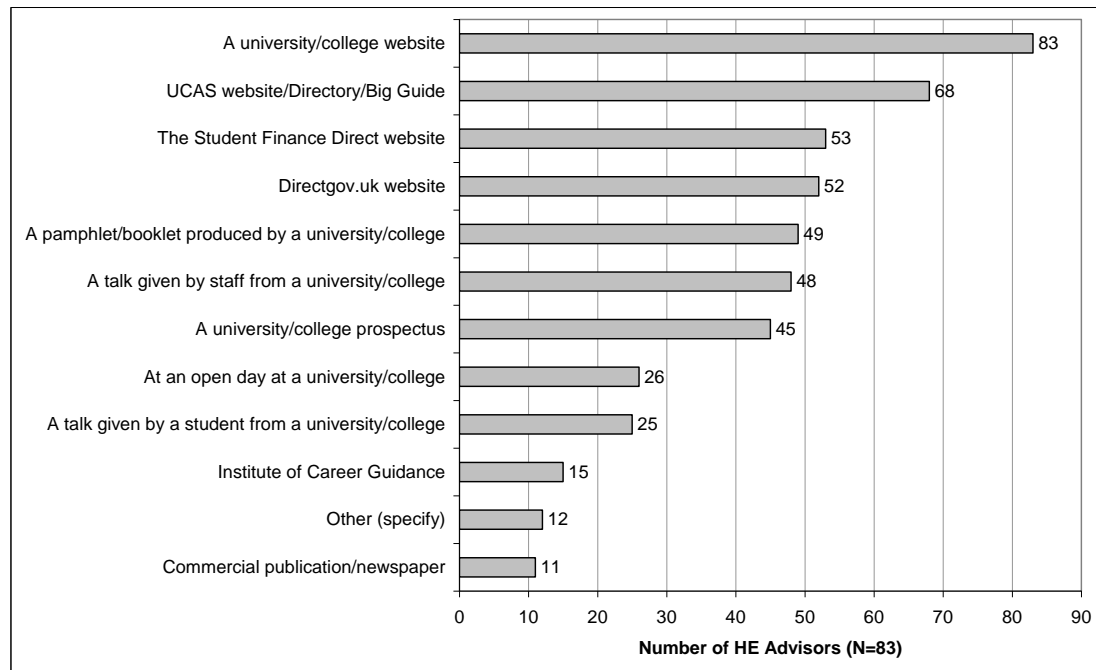
<sup>16</sup> Callender et al (2009) *op cit*; Callender and Hopkin (2009) *op cit*.

<sup>17</sup> These last two sites are now the same and since the survey was conducted the name of Student Finance Direct has been changed to Student Finance England.

<sup>18</sup> Callender et al (2009) *op cit*; Callender and Hopkin (2009) *op cit*.

minority deemed them the most useful source of information.<sup>19</sup> Similarly the government may wish to review the information it provides on other websites such as Teachernet and Aimhigher.

Figure 4.1 Sources of information used to find out about bursaries (multi-code)

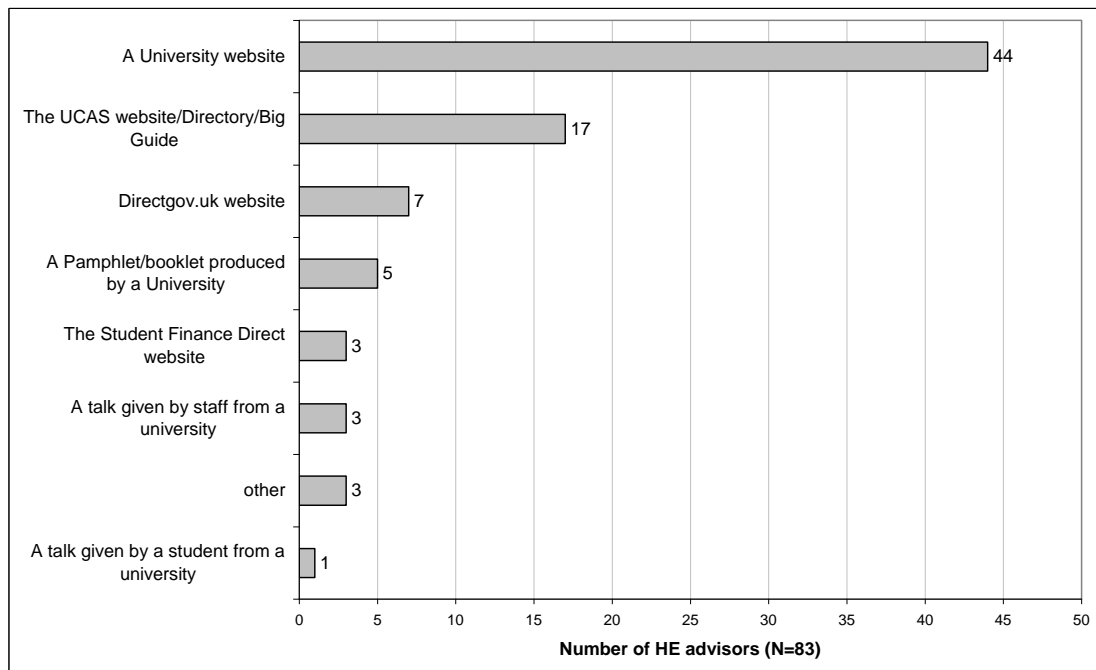


Base: HE advisors who had looked for information on bursaries

Source: Birkbeck Survey of HE Advisors, 2008

<sup>19</sup> Since this study was conducted, new links on bursary information have been added to the UCAS website with the development of Student Finance England. This new facility will enable students to calculate their eligibility to bursaries for the HEIs to which they are thinking about applying.

Figure 4.2 Most useful source of information on bursaries



Base - HE advisors who had looked for information on bursaries

Source: Birkbeck Survey of HE Advisors, 2008

#### 4.4 Adequacy of information provided

HE advisors who had looked for information on bursaries (N=83) were asked to assess the quantity and clarity of information provided in whatever they considered the most helpful source of information - primarily university websites and the UCAS website.

None of the HE advisors thought that too much information was provided about the different aspects of bursaries in these sources (Table 4.1). Over half the HE advisors reported that there was just enough information except in relation to whether the receipt of bursaries would affect a students' eligibility for government-funded financial support such as loans and grants, and when students would receive their bursary.

Interestingly, the parents surveyed also thought there was insufficient information on the impact of bursaries on eligibility to other student financial support.<sup>20</sup> It was also the topic HEIs were least likely to cover in their stand-alone information about bursaries.<sup>21</sup> By contrast, the students surveyed most frequently thought there was insufficient information on when they would receive their bursaries.<sup>22</sup>

HE advisors also were asked about the clarity of the information provided about bursaries (Table 4.2) While over half the HE advisors reported that the information provided was clear on most topics, sizable minorities thought that the information provided was unclear. This was particularly the case in relation to whether the receipt of bursaries would affect a students' eligibility for government-funded financial support. Just under a half of HE advisors rated the information provided on that topic as unclear. Again, this suggests that information providers need to review and evaluate all the information they provide and how well it is understood by the end users. HEIs, UCAS and other organisations with websites used by HE advisors need to review their content to ensure that all the information they provide is clear.

#### 4.5 Information on the amount of bursaries

HE advisors were not asked in any depth what sort of information on bursaries they sought. However, research in the US suggests that the generosity of financial help affects student decision making with students opting for HEIs offering the higher financial support.<sup>23</sup> Therefore, HE advisors who had looked for information on bursaries were asked if they had found out which HEI would give their students the largest bursary. The vast majority had not (N=71;86%), especially advisors in schools and colleges with lower rather than higher HE participation rates (N=76;92% compared with N=67;81%).

---

<sup>20</sup> Callender C and Hopkin R (2009) *op cit*.

<sup>21</sup> Callender, C (2009) *op cit* (Table 3.3).

<sup>22</sup> Callender et al (2009) *op cit*.

<sup>23</sup> Mundel, D. (2008) What do we know about the impact of grants to college students? In S. Baum, M. McPherson, and P. Steele. *The effectiveness of student aid policies: What the research tells us* (9-38). New York: The College Board

**Table 4.1 Amount of information provided on bursaries**

	<b>Amount of information</b>					
	<b>Just enough</b>		<b>Not enough</b>		<b>Can't remember</b>	
	N	%	N	%	N	%
<b>What bursaries are for</b>	60	72	14	17	9	11
<b>Which students qualify for a bursary</b>	54	65	24	29	5	6
<b>How to apply for a bursary</b>	52	63	25	30	6	7
<b>How much bursary a student would receive</b>	52	63	26	31	5	6
<b>When students would receive the bursary</b>	40	48	32	39	11	13
<b>Whether receipt of a bursary affects a student's eligibility to other government-funded financial support (e.g. grants, loans)</b>	29	35	41	49	13	16

Base :HE advisors who had looked for information on bursaries (N=83)

Source: Birkbeck Survey of HE Advisors, 2008

**Table 4.2 Clarity of information provided on bursaries**

	Clarity of information									
	Very Clear		Clear		Not clear		Not clear at all		Can't remember	
	N	%	N	%	N	%	N	%	N	%
<b>What bursaries are for</b>	15	18	53	64	11	13	1	1	3	4
<b>How to apply for a bursary</b>	7	8	50	60	21	25	1	1	4	5
<b>How much bursary a student would receive</b>	14	17	42	51	22	26	1	1	4	5
<b>Which students qualify for a bursary</b>	12	15	46	55	23	28	0	0	2	2
<b>When students would receive the bursary</b>	7	8	39	47	31	37	2	2	4	5
<b>Whether receipt of a bursary affects a student's eligibility to other government-funded financial support (e.g. grants, loans)</b>	8	10	27	32	37	45	1	1	10	12

Base :HE advisors who had looked for information on bursaries (N=83)

Source: Birkbeck Survey of HE Advisors, 2008

## 5 HE ADVISORS' KNOWLEDGE AND UNDERSTANDING OF STUDENT FINANCIAL SUPPORT AND BURSARIES

### 5.1 How well-informed HE advisors are about student financial support including institutional support

All HE advisors were asked how well-informed they thought they were about the various sources of student financial support. They also were asked a similar question about how well-informed they thought their students, and their students' parents were.

The majority of HE advisors surveyed rated themselves as well-informed about all the different types of student financial support available, both government and non-government funded (Table 5.1). Significantly, for the focus of this study, they were least well versed about bursaries (78% very and fairly well-informed) and scholarships (71% very and fairly well-informed). The HE participation rate in the institution where the HE advisor worked, had no significant impact on their levels of knowledge.

Interestingly, HE advisors' ratings of how well-informed they were about student funding, were markedly higher than HEIs' ratings of HE advisors' knowledge about them. Just over a half of respondents in the survey of HEIs considered that HE advisors were well-informed about government-funded financial support and a half thought them well-informed about bursaries and scholarships.<sup>24</sup>

**Table 5.1 HE advisors' assessment of how well-informed they were about student financial support**

	<b>Very well-informed</b>	<b>Fairly well-informed</b>	<b>Poorly informed</b>	<b>Very poorly informed</b>
	%	%	%	%
<b>University tuition fees</b>	73	22	4	1
<b>Government funded student financial support e.g. loans, grant etc</b>	61	30	7	1
<b>Bursaries</b>	35	43	18	3
<b>Scholarships</b>	26	45	24	5

Base (N): 150

Source: Birkbeck Survey of HE Advisors, 2008

<sup>24</sup> See Callender, C (2009) *op cit.* (Table 4.2).



All the HE advisors surveyed were also asked to rate how well-informed they considered their students were about the same sources of student funding (Table 5.2). Overall, HE advisors thought their students were less knowledgeable than they were, except in relation to university tuition fees where a similar proportion was well-informed (93%). HE advisors rated their students as most well-informed about tuition fees and least well-informed about bursaries (64%) and scholarships (51%).

There were some interesting differences in HE advisors' perceptions of their students' knowledge about financial support, and students' own ratings of their knowledge as reported in the student survey conducted as part of the OFFA study. Overall, HE advisors rated their students as better informed than students surveyed in all aspects of student funding. They were particularly likely to think that their students were better informed about bursaries and scholarships. As Table 5.2 shows, 64 per cent of HE advisors thought their students well-informed about bursaries while only 47 per cent of the students surveyed thought themselves knowledgeable. In addition, 52 per cent of HE advisors reported that their students were well-informed about scholarships compared with 32 per cent of the students surveyed.<sup>25</sup> These findings are important.

Arguably, it might be expected that students who enter higher education – all those who participated in the student survey – would be better informed about financial support than a mixture of pupils/students only some of whom would go to higher education – the HE advisors' students. These findings suggest that HE advisors overestimated the extent of their students' knowledge about student support, especially bursaries and scholarships. In turn, this could influence some of their students' HE decisions.

HE advisors were also asked to rate their students' parents' level of knowledge about student financial support. Advisors expected that over two-thirds of students' parents were well-informed about tuition fees and government-funded student financial support while more than half were poorly informed about bursaries (57%) and scholarships (64%).

When HE advisors' perceptions of parental knowledge of student funding are compared with parents' own assessment of their knowledge – in the survey of parents<sup>26</sup> – there are some significant differences. Advisors believed that parents were less well-informed about all aspects of student funding compared to the parents' own assessment of their knowledge. These findings might appear to suggest that HE advisors may under-estimate parents' knowledge. However, it is perhaps not surprising that the parents surveyed were better informed than advisors might think. It will be recalled all these parents had children who went to university, unlike the parents of the children attending the HE advisors' educational institution.

---

<sup>25</sup> Callender et al. (2009) *op cit*.

<sup>26</sup> Callender and Hopkin (2009) *op cit*

**Table 5.2 HE advisors' assessment of how well-informed their students were about student financial support**

	<b>Very well-informed</b>	<b>Fairly well-informed</b>	<b>Poorly informed</b>	<b>Very poorly informed</b>
	%	%	%	%
<b>University tuition fees</b>	50	43	6	0
<b>Government funded student financial support e.g. loans, grant etc</b>	37	48	13	2
<b>Bursaries</b>	14	50	29	7
<b>Scholarships</b>	11	41	38	9

Base (N): 150

Source: Birkbeck Survey of HE Advisors, 2008

**Table 5.2 HE advisors' assessment of how well-informed their students' parents were about student financial support**

	<b>Very well-informed</b>	<b>Fairly well-informed</b>	<b>Poorly informed</b>	<b>Very poorly informed</b>
	%	%	%	%
<b>University tuition fees</b>	25	55	19	2
<b>Government funded student financial support e.g. loans, grant etc</b>	19	50	27	4
<b>Bursaries</b>	8	35	46	11
<b>Scholarships</b>	7	29	53	11

Base (N): 150

Source: Birkbeck Survey of HE Advisors, 2008

## 5.2 HE advisors' understanding of bursaries

All HE advisors who were aware of bursaries (N=133) were asked a series of questions about their understanding and knowledge of bursaries.

First, they were simply asked if they understood what is meant by a bursary. According to this subjective measure, the vast majority (99%) did understand the term.

Next, HE advisors were asked how they would describe a bursary and how they would describe a scholarship. These questions were asked because it has been suggested by some commentators that the language and terminology used to describe bursaries and scholarships can be confusing. These commentators argue that this confusion adds to the complexity of the student funding system and in turn, may affect the take-up of bursaries.

Traditionally, bursaries are understood to include financial assistance made to students based on their financial need though some form of means testing while scholarships are often understood to mean financial support awarded solely on the basis of merit. However, as the survey of HEIs demonstrated, in reality, some scholarships are awarded purely on financial need; some are awarded based purely on merit, while others are awarded on a combination of merit and financial need.<sup>27</sup> The questions in the HE advisor survey sought to find out the extent to which HE advisors understood bursaries and scholarships according to these 'traditional' definitions. In other words, the questions attempted to assess HE advisors' comprehension of the eligibility criteria used for the allocation of bursaries and scholarships, and if there were any differences in these eligibility criteria. However, there are no 'right' and 'wrong' answers to these questions because examples of bursaries or scholarships fitting some or all the criteria listed do exist.

As Fig 5.1 clearly shows, the majority of HE advisors see bursaries as being allocated on the basis of: a student's family income (74%), the subject they are studying (67%) and if a student attends their local HEI (56%). However, a sizable minority - over two in five - also think that bursaries are distributed based on a student's attainment or academic merit.

Conversely, as Fig 5.2 shows, most HE advisors reported that scholarships were awarded based on a student's achievement, but over a quarter HE advisors thought they were disbursed based on a student's family income or if a student attends a local HEI. So clearly, not all HE advisors' understanding of the eligibility criteria for bursaries and scholarships match the 'traditional' definitions.

As suggested, given the diversity of bursaries and scholarships available there were no 'right' or 'wrong' answers to these particular questions. However, research<sup>28</sup> has examined the eligibility criteria used by HEIs to disburse their institutional financial support. It shows that of the 303 different bursaries and scholarships available in 2006/07, 60 per cent were means-tested and took into consideration family income, 32 per cent were non-need based and were allocated purely on student merit, while the remainder were allocated on the basis of financial need and merit. Of those schemes that were allocated exclusively on student financial need, what traditionally would be called bursaries - only 18 per cent were awarded depending on the subject students studied. By contrast of the awards allocated exclusively on the basis of student merit - what traditionally would be called scholarships - some 75 per cent were

---

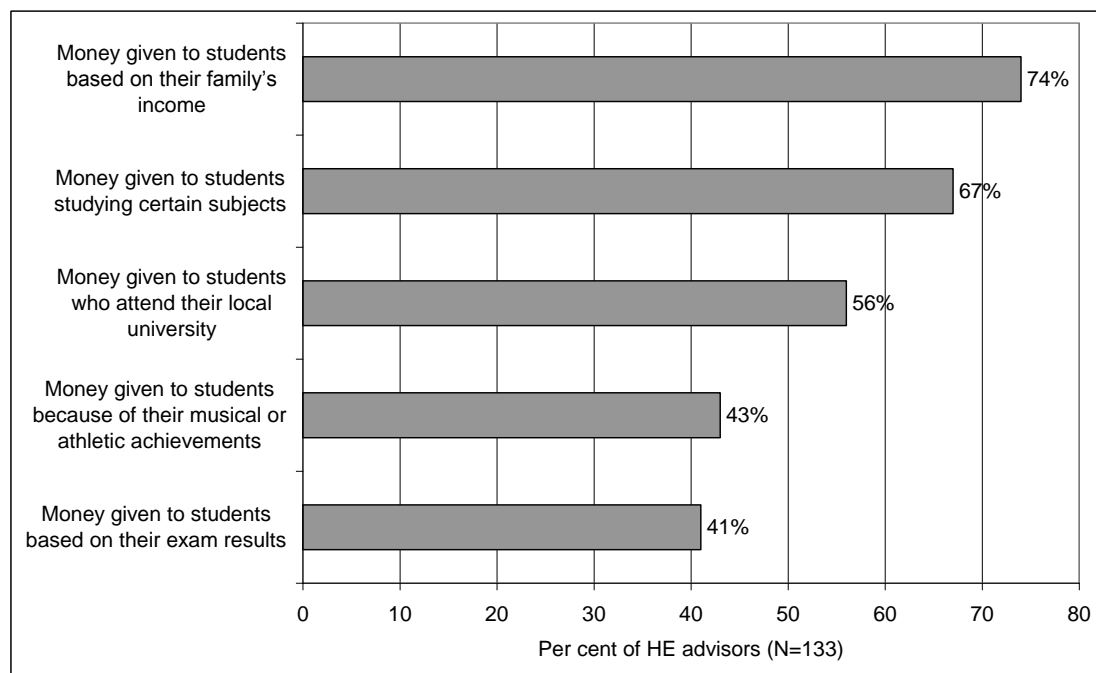
<sup>27</sup> See Callender, C (2009) Higher Education Institutions' strategies to increase the awareness and take-up of institutional bursaries and scholarships (Section 2).

<sup>28</sup> Callender, C (forthcoming) Bursaries and Institutional Aid in Higher Education in England: Do they safeguard access and promote fair access? *Oxford Review of Education*, 36:1

awarded based on the subject a student studied. Cutting across both 'need' and 'non-need' bursaries and scholarships were 15 per cent of awards allocated exclusively to local students.

Thus, when compared with the bursaries and scholarships available throughout England- HE advisors may well have over-estimated how frequently bursaries are allocated on the basis of the subject a student studies and whether they attend their local HE institution. This means they may misinform their students about bursary eligibility.

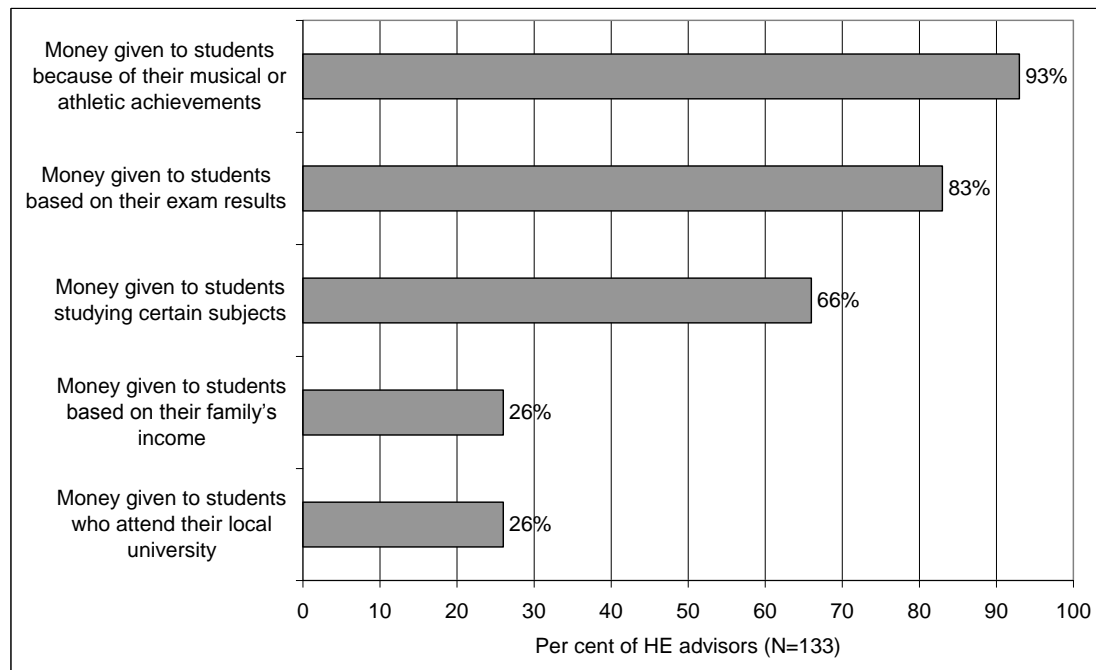
Figure 5.1 How HE advisors describe a bursary (multi-code)



Base: HE advisors who had heard of bursaries N= 133

Source: Birkbeck Survey of HE Advisors, 2008

Figure 5.2 How HE advisors describe a scholarship (multi-code)



Base: HE advisors who had heard of bursaries N=133

Source: Birkbeck Survey of HE Advisors, 2008

### 5.3 HE advisors' knowledge of bursaries

Another series of questions aimed to assess more objectively how knowledgeable HE advisors were about bursaries, rather than relying on HE advisors' subjective judgements (section 5.1). Again the questions were only asked of HE advisors who were aware of bursaries (N=133).

HE advisors were asked to identify whether a particular statement about bursaries was true, false, or they did not know the answer. From their answers, it is possible to gauge HE advisors'

- knowledge about bursaries,
- what they have misunderstood or have been misinformed about bursaries, and
- what they do not know about bursaries.

Table 5.3 shows the HE advisors' responses to all the statements. Figure 5.3 focuses on the proportion of HE advisors giving the correct answer to a statement about bursaries – irrespective of whether the statement was true or false. In other words, it highlights which characteristics of bursaries HE advisors were most and least likely to know about. Overall, HE advisors reported fairly high levels of knowledge with over a half giving the correct answer to nine out of the ten statements. Figure 5.3 shows that the HE advisors surveyed were most knowledgeable about the fact that:

- bursaries are not-repayable (99%);
- the amount of bursary a student can get varies from one university to another (93%); and
- bursaries are available not only to students in receipt of a full maintenance grant (84%).

HE advisors were least knowledgeable about the minimum value of a bursary given to students in receipt of a full government grant – only 38 per cent of HE advisors knew this.

Figure 5.4 turns to the proportion of HE advisors who gave the wrong answer to a particular statement. These responses highlight HE advisors' misunderstandings about bursaries and those aspects of bursaries they were confused about. It highlights that at least a quarter of HE advisors were confused about the fact that:

- bursaries are not just paid to students from low income families (26%);
- the amount of bursary a student can get can vary depending on the subject a student studies (26%) - indeed some HEIs give bursaries specifically to attract students into hard to recruit subjects;
- bursaries are not paid for by the government but by HEIs themselves (25%); and
- bursaries are not one-off payments paid only to students in their first year (25%) but are paid throughout a student's time at university although the amount they receive each year may vary.

Finally, Figure 5.5 focuses on the number of HE advisors who reported that they did not know the answer to a particular statement. It shows what HE advisors were most ignorant about the size of bursary payments, particularly that

- the minimum bursary given to students on a full grant is £310 a year [in 2008/09]; and
- the average bursary for a low-income student is around £1,000.

Overall, these findings suggest that most HE advisors do know about some of the key features of bursaries, but there are sizable pockets of misunderstanding and ignorance.

There were some differences in the level of HE advisors' knowledge and understanding of bursaries depending on the HE participation rates in their institutions. However, there were no consistent patterns. Advisors in schools and colleges with HE participation rates of under 75 per cent were more likely than advisors working in institutions with higher participation rates to know that HEIs charging the maximum tuition must give students in receipt of a full grant a bursary (68% compared with 58%), and that the minimum payment is £310 (46% compared with 32%). This may be because it is likely that a larger proportion of their students come from low-income families, and so would be eligible for full grants, and bursaries.

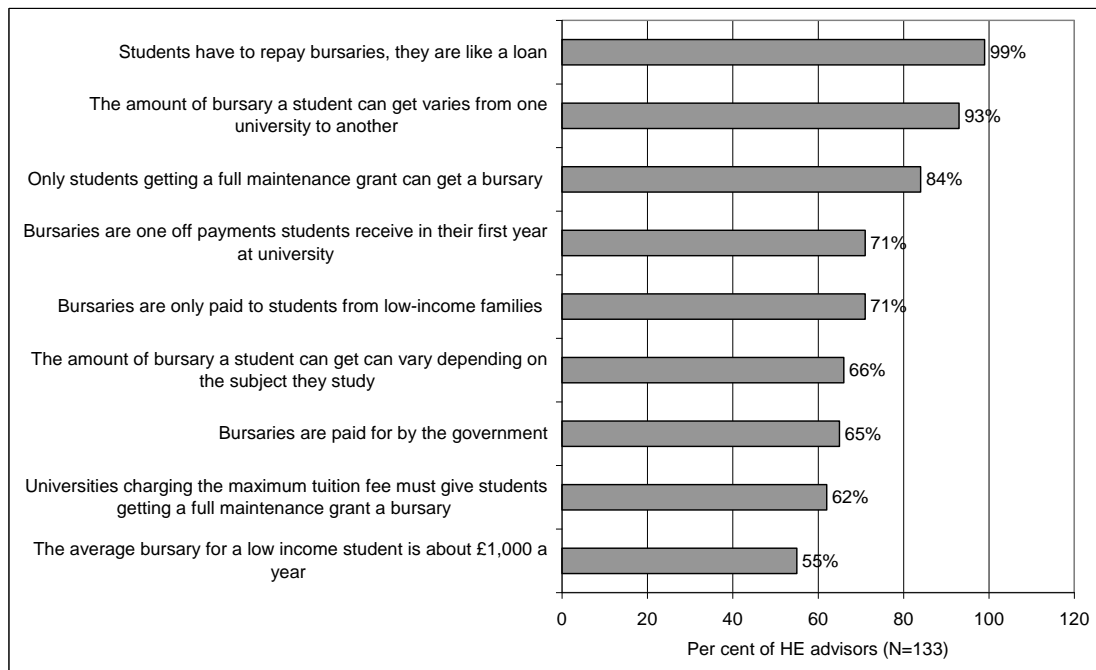
**Table 5.3 Statements about bursaries**

Statement	Knowledge		
	True	False	Don't know
	%	%	%
The amount of bursary a student can get varies from one university to another [true]	93	7	0
The amount of bursary a student can get can vary depending on the subject they study [true]	66	26	8
The average bursary for a low income student is about £1,000 a year [true]	55	14	31
Bursaries are only paid to students from low-income families [false]	26	71	4
Universities charging the maximum tuition fee must give students getting a full maintenance grant a bursary [true]	62	19	19
Bursaries are one off payments students receive in their first year at [false]	25	71	4
Only students getting a full maintenance grant can get a bursary [false]	10	84	7
The minimum bursary given to students on a full grant is £310 a year [true]	38	19	43
Bursaries are paid for by the government [false]	25	65	10
Students have to repay bursaries, they are like a loan [false]	0	99	1

Base: HE advisors who had heard of bursaries N=133

Source: Birkbeck Survey of HE Advisors, 2008

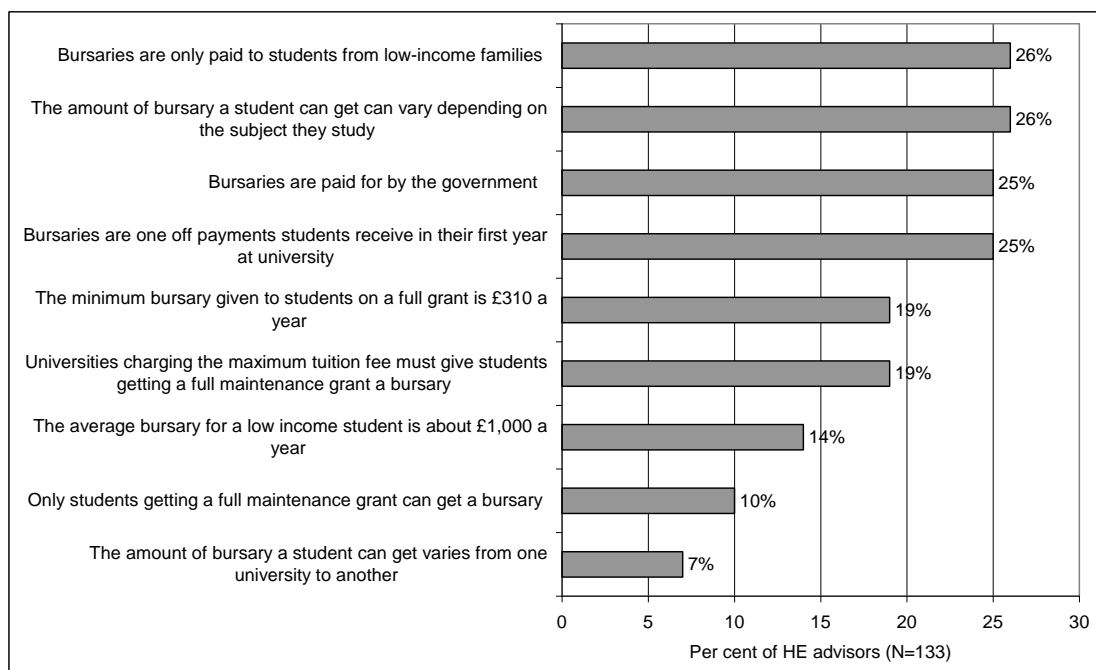
Figure 5.3 HE advisors' knowledge of bursaries –answered correctly



Base: HE advisors who had heard of bursaries N=133

Source: Birkbeck Survey of HE Advisors, 2008

Figure 5.4 HE advisors' misunderstandings about bursaries – answered incorrectly

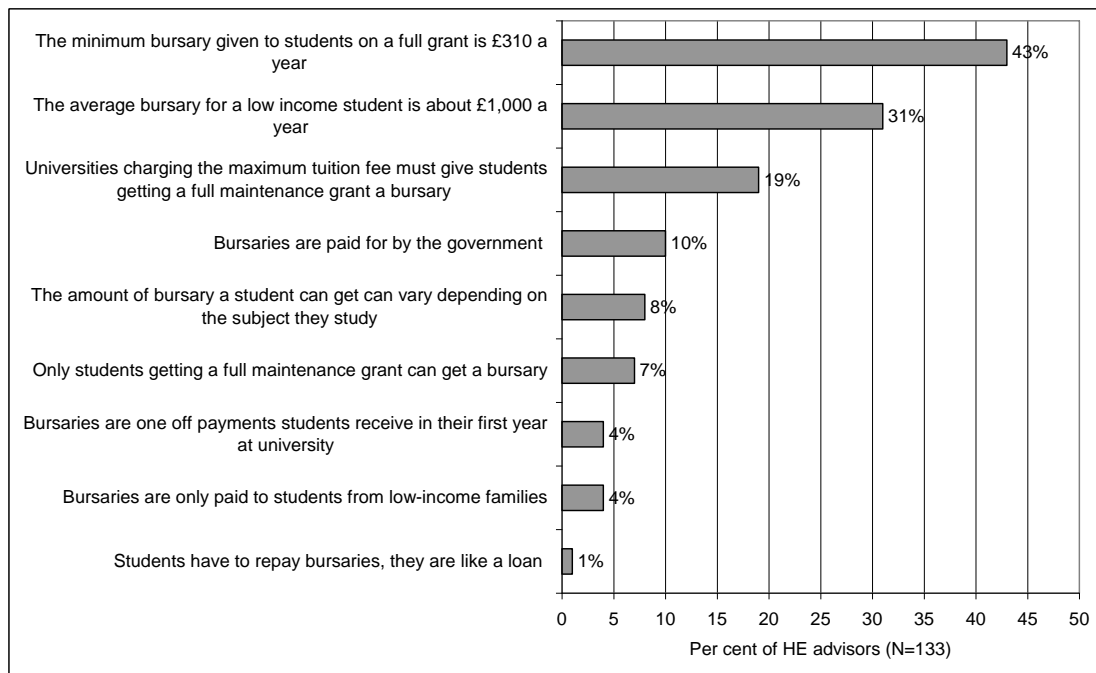


Base: HE advisors who had heard of bursaries N=133

Source: Birkbeck Survey of HE Advisors, 2008



Figure 5.5 HE advisors' ignorance about bursaries – did not know answer



Base: HE advisors who had heard of bursaries N=133

Source: Birkbeck Survey of HE Advisors, 2008

## 6 HE ADVISORS' ATTITUDES TO BURSARIES

All HE advisors (including those who had not heard of bursaries) were asked about their views on bursaries and whether they agreed or disagreed with a number of statements (Table 6.1). There was a large amount of consensus among HE advisors.

More than half of all HE advisors agreed with the following statements about bursaries:

- *It is difficult to understand the difference between bursaries and scholarships* (70%)
- *Bursaries are not important in students' decisions about where to go to university* (69%)
- *There is not enough information about bursaries* (69%)
- *It is difficult to understand who can get a bursary* (65%)
- *The language used to describe bursaries is confusing* (61%)
- *Bursaries are too complex* (59%)

These HE advisors' views on bursaries clearly illustrate the main problems HE advisors face in trying to understand bursaries and in trying to obtain information about them. However, perhaps most significant of all is the finding that over two-thirds of HE advisors think that bursaries are not important in students' decisions about where to go to university.

By contrast, over half of all HE advisors disagreed with the following statements about bursaries:

- *To receive a scholarship is stigmatizing* (96%)
- *To receive a bursary is stigmatizing* (93%)
- *Students' parents do not want their children to get a bursary* (93%)
- *The parents of our students know more about bursaries than their children* (89%)
- *Only low-income students should get bursaries or scholarships* (80%)

There were no consistent differences in HE advisors' views depending upon the HE participation rates of their educational institution. However, advisors in schools and colleges with HE participation rates of under 75 per cent were more likely than their colleagues in institutions with higher participation rates to believe that: *the language to describe bursaries was confusing* (71% compared with 54%); *it is difficult to understand who can get bursaries* (71% compared with 61%); and that *bursaries are unimportant in students' decisions about where to go to university* (74% compared with 65%). This suggests that advisors in schools and colleges with students most likely to benefit from bursaries particularly struggled to understand who qualified for them and were especially confused by the language used to describe them. Again this is associated with the clarity of the information provided by HEIs about their bursaries. While HEIs may think their information is clear, a key audience for this information think otherwise.

There were some similarities and differences between the HE advisors' attitudes towards bursaries and students'<sup>29</sup> attitudes. Similar proportions of HE advisors and students thought "*Bursaries are not important in deciding where to go to university*" (72%), "*It is difficult to understand who can get a bursary*" (65%) and that "*Parents do not want their children to get a bursary*" (6%).<sup>30</sup>

The largest differences in attitudes were that HE advisors were far more likely than students to believe:

- *There is not enough information about bursaries* (42%)
- *It is difficult to understand the difference between bursaries and scholarships* (47%)
- *The language used to describe bursaries is confusing* (39%)
- *Bursaries are too complex* (39%)

However, HE advisors were far less likely than students to agree that:

- *Only low-income students should get bursaries or scholarships* (41%)
- *To receive a scholarship is stigmatizing* (39%)
- *To receive a bursary is stigmatizing* (26%)

These variations reflect the different preoccupations of HE advisors and students and their different levels of knowledge about bursaries. Advisors exhibited greater concerns about getting information on bursaries and understanding bursaries as well as who qualified for them, presumably so that they could provide the best advice and guidance to their students. In contrast, students were somewhat more concerned about how the receipt of bursaries impacted on them as individuals.

In addition, there were some similarities and differences between the HE advisors' attitudes towards bursaries and students' parents'<sup>31</sup> attitudes but these were not as great as those between HE advisors and students. The most pronounced differences were that HE advisors were far more likely than parents to believe "*Bursaries are not important in deciding where to go to university*" (46%) but less likely to agree that "*Only low-income students should get bursaries or scholarships*" (39%).

---

<sup>29</sup> Note some of the attitudes assessed in the student and parent survey differed from those in the HE advisor survey.

<sup>30</sup> Callender et al (2009) *op cit* Chapter 7

<sup>31</sup> Callender (2009) *op cit* Chapter 6

**Table 6.1 HE advisors' views about bursaries**

<b>Attitude</b>	<b>Agree</b>	<b>Disagree</b>
	<b>%</b>	<b>%</b>
It is difficult to understand the difference between bursaries and scholarships	70	30
Bursaries are not important in students' decisions about where to go to university	69	31
There is not enough information about bursaries	69	31
It is difficult to understand who can get a bursary	65	35
The language used to describe bursaries is confusing	61	39
Bursaries are too complex	59	41
Only low-income students should get bursaries or scholarships	20	80
The parents of our students know more about bursaries than their children	11	89
Students' parents do not want their children to get a bursary	7	93
To receive a bursary is stigmatizing	7	93
To receive a scholarship is stigmatizing	4	96

Base: All HE advisors N=150

Source: Birkbeck Survey of HE Advisors, 2008

## **7 PROVIDING INFORMATION ON BURSARIES TO STUDENTS AND THE IMPACT OF BURSARIES ON STUDENT DECISION MAKING**

### **7.1 Providing students with information on student funding and bursaries**

All HE advisors were asked if they, or their colleagues, provided their students with general information, advice, and guidance about the financial support their students can get while at university, and at what stage they supplied the information (Table 7.1). All the HE advisors gave some advice to their students about student funding. Three-quarters (75%) offered information, advice, and guidance before students had submitted their UCAS application. Specifically:

- when discussing with their students whether or not they should apply to university (33%);
- when discussing with their students their university choices such as what subjects to study and to which universities to apply (15%);
- before their students applied to university (20%), and
- when students are doing their UCAS application (7%).

There were no differences in the proportion of HE advisors providing information at these early stages of decision making by HE participation rates of their institution.

75 per cent and over were slightly more likely than advisors working in schools with lower HE participation rates to 70% compared with 62%)..

Those HE advisors who had heard of bursaries (N=133) were also asked whether they, or their colleagues, provided their students with specific information, advice, and guidance about the bursaries students can get from a university, and at what stage they supplied this information (Table 7.2). The vast majority of these HE advisors (94%) had given their students information about bursaries.

The main reasons the handful of advisors (N=8) had not provided any information on bursaries were as follows:

- They did not feel qualified to discuss bursaries or did not know enough about them (N=3)
- They leave it to students and/or their parents to look for information on bursaries (N=2).

Whatever, the reason for not providing students information, it does mean that some students are receiving no guidance at all from HE advisors who should be a key source of information.

Of those HE advisors who had heard of bursaries and supplied their students with information, guidance, and advice specifically on bursaries (N=125), a half discussed bursaries with their students before they had applied to university or when completing their UCAS application form (Table 7.2). HE advisors at institutions with higher HE participation rates were more likely than their colleagues at institutions with lower participation rates to have informed their students about bursaries at these earlier stages in the university application process (68% compared with 47%). This is important because the affordability of HE along with financial issues and considerations are more likely to affect low-income applicants' HE decisions - those who are concentrated in educational institutions with low HE participation rates. For example, low-income student are more likely than their more affluent peers to choose a local university and live at home, as a means of saving money while studying.

The vast majority (84%) of HE advisors told their students how and where to get information on bursaries (Figure 7.1). However, only a minority provided some fundamental facts and information about bursaries such as: how to apply for bursaries; whether or not they are eligible for a bursary; and how bursaries vary from one university to another. There was a tendency for HE advisors in schools and colleges with higher HE participation rates to talk more about these issues, but the differences between HE advisors were not large. Thus clearly, most HE advisors do not discuss bursaries in any detail with their students and assume that students will find out about them. However, as the OFFA student survey shows this is not the case as about a quarter of students had not heard of bursaries, and of those who had, nearly a third had not looked for information on them.

**Table 7.1 When HE advisors provide their students with information on student financial support**

<b>Timing</b>		
	<b>%</b>	<b>N</b>
<b>When discussing whether or not they should apply to university</b>	33	50
<b>When discussing their university choices such as what subjects to study and which universities to apply to</b>	15	22
<b>Before students apply to university</b>	20	30
<b>When students are doing their UCAS application</b>	7	11
<b>After submitting their UCAS application, but before they have been offered a place at university</b>	5	7
<b>After students have been offered a place at university</b>	3	5
<b>When students apply for student financial support</b>	3	5
<b>Throughout the year</b>	2	4
<b>At another time – specify</b>	6	9
<b>Timing varies from one student to another</b>	5	7
<b>Base</b>	100	150

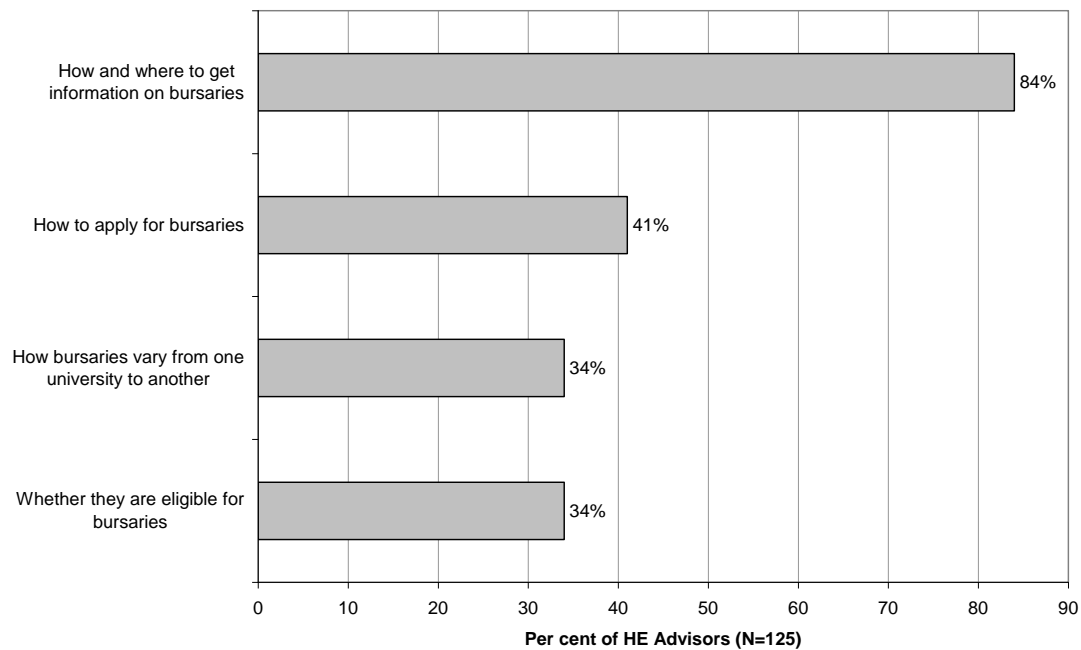
*Source:* Birkbeck Survey of HE Advisors, 2008

**Table 7.2 When HE advisors provide their students with information about bursaries**

<b>Timing</b>		
	<b>%</b>	<b>N</b>
<b>When discussing whether or not they should apply to university</b>	11	14
<b>When discussing their university choices such as what subjects to study and which universities to apply to</b>	18	22
<b>Before students apply to university</b>	12	15
<b>When students are doing their UCAS application</b>	10	13
<b>After submitting their UCAS application, but before they have been offered a place at university</b>	12	15
<b>After students have been offered a place at university</b>	8	10
<b>When students apply for student financial support</b>	5	6
<b>At another time – specify</b>	10	13
<b>Timing varies from one student to another</b>	13	17
<b>Base</b>	100	125

*Source:* Birkbeck Survey of HE advisors, 2008

Figure 7.1 Type of information about bursaries HE advisors give their students



Source: Birkbeck Survey of HE Advisors, 2008

## 7.2 The impact of bursaries on student decision-making

Evidence from the US suggests students' decisions about which HEI to apply to and to attend are influenced by the availability and the generosity of the bursaries and scholarships offered by an HEI.<sup>32</sup> In other words, institutional aid – bursaries and scholarships – is used by some HEIs as a financial incentive to attract certain types of students to their HEI. A recent UK study<sup>33</sup> of over 120,000 UCAS applicants also found that around 12 per cent of students reported that their choice of HEI had been influenced by the course fees and the bursaries available, and that students from lower-income families were somewhat more likely than their wealthier peers to be influenced in this way. Therefore, the HE advisors surveyed were asked a range of questions to gauge the impact of bursaries on their students and the role bursaries played in their students' decision-making.

First, as we have seen (Figure 6.1), most HE advisors did not think that bursaries were important when their students were deciding where to go to university.

Secondly, those HE advisors who were aware of bursaries (N=133) were asked to what extent, if at all, the amount of bursary a student can get influences which HEI their students

<sup>32</sup> Mundel, D. (2008) What do we know about the impact of grants to college students? In S. Baum, M. McPherson, and P. Steele. *The effectiveness of student aid policies: What the research tells us* (9-38). New York: The College Board

<sup>33</sup> Purcell, K., Elias, P., Ellison, R., Atfield, G., Adam, D., and Livanos, I. (2008) *Applying for Higher Education – the diversity of career choices, plans and expectations* Higher Education Career Services Unit and Warwick Institute for Employment Research, [http://www.hecsu.ac.uk/hecsu.rd/documents/Futuretrack\\_Report0408.pdf](http://www.hecsu.ac.uk/hecsu.rd/documents/Futuretrack_Report0408.pdf) Accessed 10/02/2009.



applied to, or what courses they chose to study at university. Five HE advisors did not know how bursaries may have influenced their students' decisions. However, the remaining HE advisors who did know (N=128), were divided. Some 52 per cent thought the amount of bursary offered had no impact on their students' choices while 48 per cent thought the amount did have an impact. And of those who reported that the value of bursaries was influential, nearly a half thought it affected only a handful of students.

In an open-ended question, the 48 per cent (N= 61) of advisors who thought the amount of bursary a student could get influenced their students' choices were asked how they thought the amount of bursary impacted on their students' decisions. A sizable number of respondents (N=21) did not answer the question correctly (they expanded on the extent to which the size of bursaries affected students' choices).

The remaining 40 HE advisors gave a wide range of often conflicting opinions as to how bursaries influenced students' HE choices and decisions. Some (N=11) thought that their students' choices were influenced more by the course or subject they wanted to study and the reputation of the HEI than by the availability and generosity of bursaries. These HE advisors who stressed the importance of the course rather than bursaries in student decision-making, also commented how although financial matters were important and influenced their students' decisions, the size of bursaries were generally small. Comments included:

*"For some students it is very important, for some students they don't see the bigger picture. They might be fixed on one particular university or course regardless of the bursary."* (HE advisor at a FE College)

*"Bursaries are not top of the list they look out for but it is a factor, the university's rating, reputation and fees are more of a priority."* (HE advisor at a FE College)

*"Getting a bursary is a big thing but the amount is tiny."* (HE advisors at a school)

*"In some subject areas it is more significant because you are looking at hundreds rather than tens of pounds."* (HE advisor at a school)

The above comments also may reflect a lack of knowledge about bursaries or may be based on the experience of one or two higher income students.

Other HE advisors gave more explicit reasons as to how the amount of bursary offered by an HEI influenced their students' choices. Those most frequently mentioned included:

- Bursaries can encourage a student to enter higher education (N=6)

*"It makes students think well perhaps university is affordable and they can go."* (HE advisor at a school)

*"If they are coming from an under privileged community the amount of bursary would actually decide if they go to university."* (HE advisor at a school)

*"In some respects bursaries inspire students from a lower economic background."* (HE advisor at a school)

*"Bursaries influence them a lot because they come from under privileged areas so finance is a big issue for them"* (HE advisor at a school)

- Bursaries help in students' decision making and some opt for universities paying larger bursaries (N=6)

*"When students make a choice, additional funds make the choice easier."* (HE advisor at a FE College)

*“I have not had a student approach me and say they were choosing to go to such and such a university because of their bursary/but if a student is humming and hawing about which university to go to it may tip the balance.”* (HE advisor at a school)

*“It would make them prioritise one institution over another.”* (HE advisor at a school)

*“If one particular university is offering more of a bursary for the same or equivalent course, then the student is likely to pick that university, if the university and its reputation is the standard they are looking for.”* (HE advisor at a 6<sup>th</sup> Form college)

- The amount a student can get could determine where a student studies and specifically if they decided to study at a local university or to go elsewhere (N=5)

*“It depends on the amount students get which determines if they stay local or go elsewhere in some cases.”* (HE advisor at a FE College)

- Bursaries helped to reduce student debt (N=3)
- Being able to support themselves – more independent of their parents (N=2)

Similarly, HE advisors who thought that the amount of bursary a student could receive had no impact on which HEIs their students applied to or what courses they chose to study were asked, in an open-ended question, why they thought this was the case. They most frequently answered that there were more important factors in students decision making such as where they want to study and what they want to study (N=32). Such views were summed up by the following comments:

*“Most of my students wish to apply to top level universities. Therefore the institute and course choice is the most important factor.”* (HE advisor at a school)

*“Particularly for my students, they are looking for local universities, so bursaries aren't a priority.”* (HE advisor at a school)

*“They are more interested in going on to the right course and worry about finance later.”* (HE advisor at a 6<sup>th</sup> Form College)

However, advisors often qualified their comments suggesting that financial issues were relevant and that bursaries could influence their students' decisions. For example an HE advisor at a school commented:

*“Because students don't choose places according to money, they choose the university firstly by location and secondly by course content. It's always a bonus if they are offered a bursary. If there are five offers and three of them offer a bursary it makes them reconsider what their firm choice would be.”*

*“I think most of our students are lucky enough to have the financial support to choose the best university and the best course for them.”* (HE advisor at a school)

*“Students applying to uni know they are in for a financial knock so are more focused on the quality of the university and the course as the bursaries are quite small.”* (HE advisor at a school)

- Students were unaware of bursaries/don't check them out/lack of information or they did not find out about them at a stage that could influence their decision as to which HEI to apply (N=13)

*“Because they are not aware that bursaries vary so much. We tell students to contact the university direct to get information about bursaries.”* (HE advisor at a 6<sup>th</sup> Form College)

*“Mainly because the awareness of bursary does not come in to the equation until after they apply/each bursary is individualised so the students might not know which they are eligible for.”* (HE advisor at a school)

*“Because it is not specifically something they look at when choosing universities/not something they basically check for.”* (HE advisor at a 6<sup>th</sup> Form College)

*“I think that the students don't have the information about how much bursary each university offers. So it's not a consideration at the application stage.”* (HE advisor at a FE College)

*“They usually find out about the bursary after they have made their final choice.”* (HE advisor at a school)

*“I think when they go for a bursary they don't know if they are going to get one. For example my daughter didn't know she was entitled to one and the uni told her she was because of her household income but at first she was told she wasn't.”* (HE advisor at a school)

One HE advisor at a school suggested that they, rather than their students lacked information

*“Simply because we don't have the information to pass on to the students, so the students can't make any informed decisions.”*

- The value of bursaries does not vary much between HEIs or is not a large enough sum to make a difference in their students' decision-making (N=9)

*“The bursary amounts aren't different enough for them to make a difference to their choices.”* (HE advisor at a FE College)

*“Because generally it is not a significant amount to make a difference.”* (HE advisor at a FE College)

*“Probably because it is not very much.”* (HE advisor at a school)

- Advisors do not want financial matters to determine students' choices (N=3)

*“Essentially because I try and make sure the choices students make is more beneficial than financial gains, otherwise they end up with the second best courses.”* (HE advisor at a school)

### **7.3 The role of HE advisors and bursaries**

Research shows that numerous factors affect why a student chooses to study at a particular higher education institution, including HE career advisors and teachers. For example, Purcell et al's study<sup>34</sup> of UCAS applicants found that around 18 per cent of students reported that their choice of HEI had been influenced by a teacher, and seven per cent by a school careers

---

<sup>34</sup> Purcell, K, et al (2008) *op cit.*

advisor. So while HE advisors are not the most significant influence on students' choices, they do have some impact.<sup>35</sup>

The extent to which HE advisors may influence their students' HE choices and decision making, in relation to bursaries in particular is likely to depend on a wide range of factors including:

- the extent to which HE advisors were aware of bursaries;
- the availability of information on bursaries;
- the extent to which HE advisors accessed information on bursaries;
- the quality and clarity of the information provided;
- whether and when they informed their students about bursaries; and
- the sort of information they provided their students on bursaries.

We have seen that 11 per cent (N=17) of all HE advisors had not heard of bursaries. Of those who were aware of bursaries, ten per cent (N= 13) had neither received information on bursaries nor looked at information on bursaries. Furthermore, a handful (N=8) of HE advisors had not provided their students with any information on bursaries. So at least a quarter of all the HE advisors surveyed were unlikely to be in a strong position to shape their students' decisions about bursaries.

What about the remaining HE advisors who had either been given information or looked at material on bursaries, and provided their students with material on bursaries.

As we have seen (section 4.2), around a quarter of them had found it difficult to find out about bursaries. However, once they did get hold of information, the majority thought the amount of information provided was about right and it was clear, except in relation to when students would receive their bursary and whether the receipt of a bursary affected a student's eligibility to other sources of financial support.

Were these HE advisors better placed to affect their students' decisions and choices? Could bursaries play a stronger role in their students' decisions about what and where to study? Research<sup>36</sup> has identified two stages in this decision-making process, which could be influenced by the availability of financial support. The first 'searching' stage is when students search out what courses are available and think about what HEIs they want to apply to. This equates to the period of time before a student submits their UCAS application. The second stage of decision making – the 'choice' stage - takes place once students have been offered a place at the HEIs they applied to. Students then have to choose which one HEI offer they will accept, and which one will be an insurance place in case they fail to obtain the grades required for their first choice.

The timing of when HE advisors provided their students with information on bursaries, therefore, is important in understanding the potential impact of bursaries of students'

---

<sup>35</sup> Purcell et al (2008) *op cit* found that students' choice of university was most influenced by whether it offered the particular course the students wanted to pursue and by a visit to the institution.

<sup>36</sup> Hossler, D., Schmit, J. & Vesper, N. (1998). *Going to college: Social, economic and educational factors' influence on decisions students make.* Baltimore: Johns Hopkins University Press.

decision-making. For bursaries to influence students' decisions in the search stage, and for HE advisors to play a role in that, HE advisors would need to have supplied information on bursaries before their students submitted their UCAS application form. In fact, as we have seen (Table 7.2), a half of HE advisors surveyed provided bursary information at that stage and the other half had given their students bursary information after their students had submitted their UCAS application. If bursaries were to have any impact on the choice stage and for HE advisors to be actively involved in that, then the HE advisors would need to have provided the information once their students had been offered a place at university. Ten HE advisors had given students information at that stage and another 15 had provided their student with information after the students had submitted their UCAS application but before they had been offered a place. This leaves at least 19 HE advisors who provided information on bursaries at some other stage, apart from the 'search' or 'choice' stage.

If we add these 19 HE advisors to those HE advisors who were unaware of bursaries, had not looked at or been given information on bursaries, and had not provided their students with information, then we can conclude that 38 per cent of all the HE advisors surveyed were ill placed to shape their students' deliberations about bursaries, and hence the potential for bursaries to influence their students' decisions about what and where to study. Moreover, it is questionable how useful the information provided by the remaining 62 per cent of HE advisors was. As we have seen the majority did not give their students some very basic information about bursaries.

Improving HE advisors' awareness of bursaries and ensuring the advisors access information about them before their students submit their UCAS application, therefore, is vital if bursaries are to help meet HEIs' enrolment goals and to widen participation.