

Office for
Students



Understanding the impact of the financial support evaluation toolkit

Analysis and findings

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Contents

Introduction	3
Context	3
Take-up and use of the toolkit	4
Key findings from the survey and interview tools	6
Conclusions	9
Next steps for the OfS	9

Introduction

The financial support evaluation toolkit¹ has been available since 2017 to support higher education providers to understand and improve the impact of their financial support investment on student success and progression. The Office for Fair Access (OFFA)² and the OfS have asked providers to use the toolkit and share their findings in the 2016-17 and 2017-18 access agreement monitoring returns.

This report gives an overview of findings from this data and makes some suggestions of next steps to grow the use of the tool and improve our understanding of the effectiveness of financial support in higher education.

The **key points** from analysis of the access agreement monitoring data are:

- The toolkit has given providers access to a tested and robustly designed evaluation approach.
- Publication of the toolkit has supported an **improvement in the quality of evaluation** by those providers who have used it.
- For the first time, providers are widely reporting evidence of the **impact of their financial support provision on student outcomes**, rather than solely capturing opinions and reactions from students.
- Providers have used evidence from evaluation findings to **inform changes to their financial support provision**.
- Findings from the statistical tool suggest that **bursaries can be successful** in supporting recipients to achieve the same outcomes as their more advantaged peers.

Context

While there is a lack of evidence to support using financial support as an access tool (Corver 2010, Nursaw 2015³), it is widely used to support retention, success and progression and remains the largest area of investment forecast in access agreements and access and participation plans. Through the 2016-17 access agreements, providers spent £418.4m on financial support including hardship funds. The investment through 2017-18 access agreements providers was £395.6m.

¹ Available at www.officeforstudents.org.uk/advice-and-guidance/promoting-equal-opportunities/evaluation-and-effective-practice/financial-support-evaluation-toolkit/.

² OFFA closed at the end of March 2018 and responsibility for higher education access regulation transferred to the Office for Students.

³ Available at <https://webarchive.nationalarchives.gov.uk/20180511112320/https://www.offa.org.uk/egp/impact-of-financial-support/>.

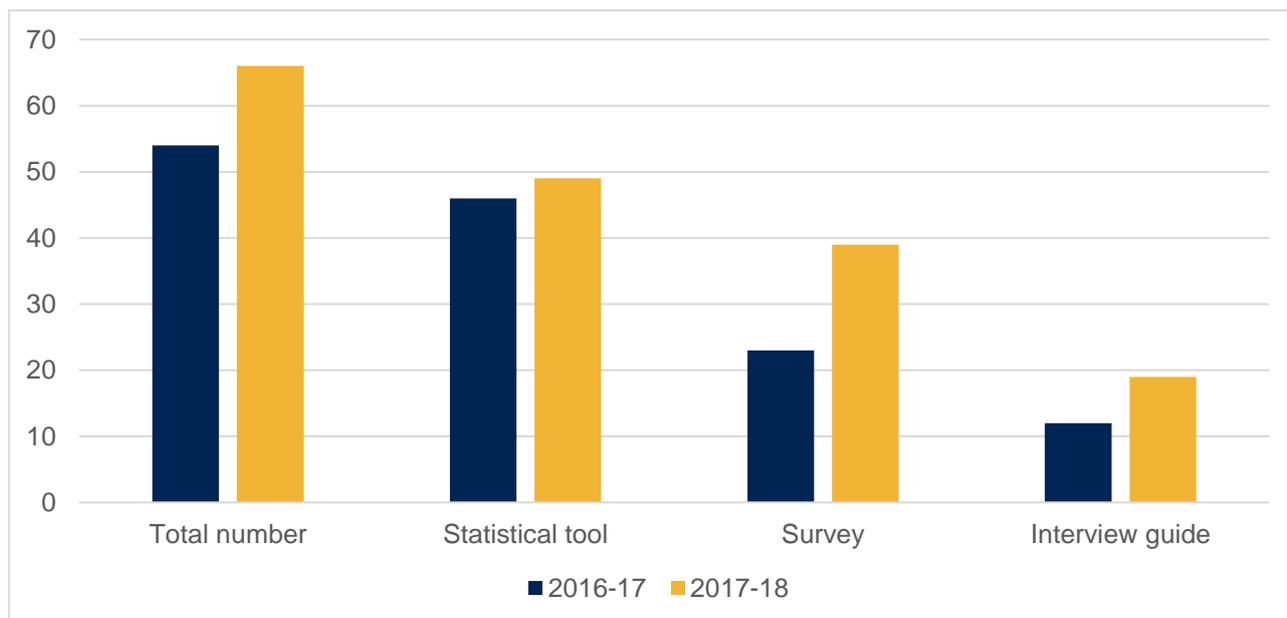
Historically, providers' approaches to evaluation have meant that the impact of financial support is not well understood. In response OFFA commissioned⁴ the development of a toolkit, as part of a wider project, to support providers to robustly evaluate their bursary provision. The toolkit⁵ consists of a statistical analysis, survey, and interview tools and guidance. Providers are recommended to use the tools together to form a mixed methods approach to evaluation.

Take-up and use of the toolkit

The toolkit was a very helpful stepping stone for us to take forward the evaluation of our financial support from internal data on impact on access, retention and success to a more detailed understanding of the impact of the bursary." (University of Exeter)

Use of the toolkit by providers has increased since its launch. Providers have used the statistical tool most frequently, whereas the interview tool has been used less often (see Figure 1).

Figure 1: Number of providers reporting use of financial support evaluation tools



To understand the full impact of financial support the toolkit was designed to be used holistically – with the survey and interview tools providing rich data to complement the statistical analysis.

These findings suggest that more support and guidance might still be needed to enable full use of the whole toolkit.

⁴ See <https://webarchive.nationalarchives.gov.uk/20180511112320/https://www.offa.org.uk/egp/impact-of-financial-support/>.

⁵ Available at www.officeforstudents.org.uk/advice-and-guidance/promoting-equal-opportunities/evaluation-and-effective-practice/financial-support-evaluation-toolkit/.

Providers have found the toolkit useful to understand the impact of their financial support

The toolkit was largely positively received. Many responses indicated that providers found their analysis results useful to build an understanding of not only their financial support impact but also to identify other factors which were related to differential outcomes for bursary recipients, such as type of accommodation or entry qualifications.

“We used the toolkit to consider the impact of financial support on several cohorts. We found it very useful in identifying additional factors which might influence differential outcomes, even where financial support had not resulted in different outcomes for students receiving it.”
(Bishop Grosseteste University)

The majority of providers found the support and guidance for the toolkit easy to follow. Some reported that a particular obstacle was the data analyst expertise required to access and format internal data for use with the statistical tool. Smaller numbers of bursary recipients were also an issue for some providers who wanted to use the statistical tool, and this could not always be overcome by combining variables or annual datasets.

Providers gave examples of how they further developed the tools and/or incorporated additional institutional data to answer evaluation questions specific to their own context.

“The tool has been very useful in disaggregating the data and showing differential performances in groups with certain characteristics. For example, on continuation into second year there are two negative results around entry qualifications and types of accommodation. The outcomes of the data confirm issues that the university is aware of, is considering and determining its practice going forward. As one example there is a multi-departmental project initiated to investigate the prior assessment experience of BTEC entrants in comparison to assessment at level 4.” (University of Winchester)

Most providers who reported statistical analysis results found strong evidence of their bursary effectiveness

A clear majority of the 49 providers in the 2017-18 monitoring⁶ found that their bursary recipients performed the same or better than the comparison group for at least one of the following student outcomes:

- Retention into second year
- Degree completion within five years
- Achieving a ‘good’ degree (1st or 2:1)
- Positive graduate outcome within six months.

⁶ Where multiple responses were received from a single provider, the latest submission was used. The OfS has not validated the statistical methodology or results and it should be noted that providers’ analyses consider different types of bursary provision in different contexts.

These findings align with the suggestions from the original project's research⁷ that bursaries provide a 'levelling effect' between recipients and their peers.⁸ In other words, results indicating that bursary recipients achieved outcomes the same as, or better than, their peers can be interpreted as strong evidence of the effectiveness of bursaries. However, a small number of providers reported a negative impact of financial support provision, suggesting the importance of institutional context to positive impact.

Both the original research and the toolkit guidance stress that without providers using a true control group, formal inference of causality between bursaries and differences in outcomes is impossible. The slower take up of the survey and interview tools further contributes to a weakening of direct evidence of positive impact.

Key findings from the survey and interview tools

Through the survey⁹, providers were able to better understand **how** and **why** the financial support affects academic, personal and social outcomes. Providers reported a summary of their survey findings which does not allow a systematic analysis or direct comparison of findings. While some common themes emerged, reflecting the focus of the questions asked, there were substantial variations across providers and between student groups in many areas. This emphasises the importance of providers' own evaluation and the limitations of transferring findings. It also highlights the importance of transparency of evidence to enable a greater understanding of context to evidence.

"Most notably, the evaluation indicated that many students were unable to consider engaging with work experience or sandwich placement because of financial constraints and that the need to commit to paid employment prevented them benefitting from these opportunities. On this basis in future years a significant proportion of funding previously allocated to hardship funding will be targeted at students under financial constraints who wish take on unpaid work experience and internships." (University of Gloucestershire)

Common themes emerging from providers' summary of survey findings include:

- **High rates of recipients agreed that their bursary is important or very important for their financial ability to continue studying.** However, it is important to highlight the variation between providers here, from as low as 55 per cent, and with one

⁷ Available at

<https://webarchive.nationalarchives.gov.uk/20180511112320/https://www.offa.org.uk/egp/impact-of-financial-support/>.

⁸ See also Hoare and Lightfoot (2015) <https://www.bristol.ac.uk/media-library/sites/sraa/documents/Hoare%20and%20Lightfoot.pdf>

⁹ Further information on the survey tool is available at: www.officeforstudents.org.uk/advice-and-guidance/promoting-equal-opportunities/evaluation-and-effective-practice/financial-support-evaluation-toolkit/survey-tool/, including the survey question: <https://www.officeforstudents.org.uk/media/284ada26-28e9-4f86-9f1a-d1ccd826efd2/financial-support-evaluation-toolkit-survey-questions.pdf>.

provider as high as 95 per cent. This also varied between underrepresented groups in different contexts. For example, one provider found a significantly higher proportion of mature students¹⁰ agreed that their bursary was important or very important.

- Bursary provision **reduced the amount of paid work** recipients reported they undertook alongside their studies; **reduced feelings of anxiety and stress** due to financial concerns; **reduced the need to borrow money**, in addition to the student loan, from family or bank overdrafts by helping towards the cost of accommodation and resources related to recipient's course, such as books or to purchase a laptop.
- Bursaries allowed recipients to **take a fuller part in social and society activities** which meant their higher education experience was more positive overall. Following the findings from the 'What Works? Student Retention and Success Programme'¹¹, engaging in curricula and co-curricular experiences is a critical element to effective student retention and success activity.
- **Low awareness from bursary recipients** of the financial support they were entitled to prior to starting their course. However, this varied widely between providers with reported awareness levels of between 19 per cent and 88 per cent.

"The findings of the interviews have been used to inform how we communicate information about the bursary to recipients. Specifically, to ensure that students are made aware that the bursary is provided... and that they are clearly informed about how much financial support they will receive." (St George's, University of London)

Many providers changed their financial support provision informed by evaluation evidence

Providers were asked how they used the evaluation findings to inform their practice. Many providers reported that using the toolkit has resulted in changes to their financial support provision and other practice areas. Main themes outlined by providers include:

- **Adjusting or designing new financial support provision:** adjusting bursary amounts, extending provision to further years of study, changing payment type or timing, amending eligibility criteria, adapting the scope and targeting of bursary support.

¹⁰ This matches findings from the Nursaw (2015) report which found some evidence of impact for mature students.

¹¹ See https://s3.eu-west-2.amazonaws.com/assets.creode.advancehe-document-manager/documents/hea/private/what_works_final_report_1568036657.pdf [PDF]

- **Improved financial support signposting:** whilst the toolkit was not designed to evaluate the impact on access, the survey responses combined with recent research¹² have influenced providers to improve signposting to their financial support provision and clarify what support is likely to be offered.
- **Driven additional focused evaluation activity:** most commonly, providers reported that the evaluation enabled them to identify further areas or questions to develop their learning about whether and how their bursaries impacted students, and to understand other related differential outcomes highlighted through the analysis.
- **Maintained current provision:** many providers maintained their current provision, informed by their evaluation evidence that the bursaries were effective, and are committed to continue evaluating.
- **Further focused research:** use of the toolkit alerted providers to how particular student groups were performing differently or having a different experience of their studies. This prompted providers to plan further qualitative research or analysis to understand this in more detail and inform specific interventions in response.

Providers not using the toolkit described less robust approaches to financial support evaluation

Providers who did not use the toolkit tended to describe less developed and less robust approaches to evaluating their financial support. Around 150 providers in 2016-17 and around 130 providers in 2017-18 who undertook evaluations using their own methods. In some cases, these methods may have been used in partnership with the toolkit. Many of these providers' evaluations were either unclear or demonstrably weaker, and therefore less robust, than evaluations of those using the toolkit. Many providers in this group continued to use their own bespoke survey tools with little evidence of robust approaches to survey design and validation.

Providers were asked to outline the aims of their financial support evaluation. From an analysis of the 2016-17 data, 12 providers did not clearly explain the goal of their evaluation, five providers reported on the evaluation of non-financial activity, and 17 providers evaluated the impact of their financial support on choice of institution, despite there being evidence contesting this link (Corver 2010, Nursaw 2015).

The most common method used by these providers was analysis of institutional data. A minority of providers carried out comparative analysis (comparing bursary holders against non-bursary holders), and a small number reported that they undertook a statistical analysis. However, the sophistication level of the statistical analysis was variable, ranging from looking at simple descriptive statistics to applying statistical tests of significance.

¹² 'Value for money: the student perspective', commissioned by the OfS, available at: www.officeforstudents.org.uk/news-blog-and-events/press-and-media/new-research-shines-spotlight-on-student-perceptions-of-value-for-money/ (project led by a consortium of students' unions, 2018). Student Information Use and Behaviour: An update to the 2014 Advisory Study for the Office for Students by CFE Research, 2018. Available at: www.officeforstudents.org.uk/publications/student-information-use-and-behaviour/.

Conclusions

The availability of a robust and tested financial support evaluation toolkit is changing the way the higher education sector understands and implements evaluation.

Providers have been generally positive about the toolkit in terms of its usability and efficacy. Furthermore, those using the tools have recognised that the toolkit gives them opportunities to see their financial support as part of a wider, effective, student package.

There has been a good take-up of the tool in its first two years, with the number of providers using it increasing over time. The toolkit is fulfilling the aim of embedding robust evaluation of financial support in provider practice. Those providers not using the toolkit show weaker standards of evaluating financial support, from the basics of formulating a valid evaluation question to methods and data use. In addition, the findings highlight the need for providers to invest in equipping their staff with the right skills to enable robust evaluations to take place.

Next steps for the OfS

We hope that sharing the evidence and insight from this analysis will enable greater sector learning and demonstrate what effective financial support **and** evaluation might look like. We also hope it will be used to enhance good practice guidance, signposting to how evaluation can be used effectively to enhance practice.

In order to gain more insight into the types and levels of support that are the most beneficial in specific contexts, the OfS will explore commissioning further analysis – to collate provider results to look at the sector-wide picture of financial support provision. Alternatively, providers could be encouraged to compare their findings with other providers or groups of providers in order to gain this insight.

The OfS will also consider how it can support smaller and newer providers in the take-up of the evaluation tools. Small providers could be supported by establishing a specialised network to aid financial support evaluation collaboration.

In order to maximise the strength of evidence about the impact of financial support, and to ensure that our regulation is driving public value, the OfS will consider how it can best support providers to undertake, and understand, the use of all elements of the toolkit – for example, using the survey and interview tools to interrogate control group analysis.



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