

Evaluation of Aimhigher: Excellence Challenge Follow-up Surveys of Opportunity Bursary Applicants 2001/02 and 2002/03

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Research Report
No 710

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Excellence Challenge*

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ISBN 1 84478 658 7

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EXECUTIVE SUMMARY

Background

The Aimhigher: Excellence Challenge programme was initially established in 2001 (when it was known as Excellence Challenge) with the aim of improving access to higher education for able young students from poorer backgrounds. The evaluation of the programme is being carried out on behalf of the Department for Education and Skills (DfES) by a Consortium comprising the National Foundation for Educational Research (NFER), the London School of Economics (LSE) and the Institute for Fiscal Studies (IFS). The programme has now been superseded by a new national programme (known as Aimhigher) funded by the Higher Education Funding Council for England (HEFCE) and the Learning and Skills Council (LSC).

The four key aims of the Aimhigher: Excellence Challenge programme were:

- ♦ to develop partnerships between schools, colleges and higher education institutions in order to raise aspirations and attainment in Excellence in Cities (EiC) areas and Education Action Zones (EAZs) and so encourage greater progression to higher education (**Strand 1**);
- ♦ to increase funding to higher education institutions to reach out to more young people (**Strand 2**);
- ♦ to provide clearer information and better marketing of the route to higher education for young people (**Strand 3**); and
- ♦ to pilot new forms of extra financial help through 26,000 Opportunity Bursaries to young people, each worth £2000 per full-time student over three years (**Strand 4**).

This report provides findings from the follow-up surveys of young people who were eligible for, and applied for Opportunity Bursaries to begin in 2001/02 (see West *et al.*, 2003b) and 2002/03 (see West *et al.*, 2005). This report combines the responses of the young people who took part in these two surveys and who had agreed to be contacted again. At the time of the follow-up surveys they had completed the second year of their higher education programmes.

A total of 1,386 usable questionnaires were returned from the two surveys of Opportunity Bursary applicants who had completed the first year of their studies (conducted in 2001/02 and 2002/03, see West *et al.*, 2003b; 2005).¹ Of these, 1,006 students (73 per cent) agreed to be contacted again and were sent a follow-up questionnaire at the end of the second year of their studies. A total of 648 questionnaires were returned (representing a response rate of 64 per cent); of these 460 were identified as coming from Opportunity Bursary

¹ Seven hundred and fifty-eight for the 2001/02 survey and 628 for the 2002/03 survey.

(OB) recipients and 100 as coming from non-recipients (88 questionnaires could not be used).

Key findings from the survey, which focuses on the experiences, views and attitudes of recipients and non-recipients of Opportunity Bursary students in the second year of their programmes of study are presented below.

Characteristics of respondents

- ♦ Virtually all OB recipients and non-recipients reported having taken GCSEs and the vast majority had taken GCE A levels. The mean GCSE point score was the same for both recipients and non-recipients and the median score was very similar. The mean (and median) GCE A level points scores were similar for recipients and non-recipients.
- ♦ Of those students who had received OBs and who provided relevant information 72 per cent were females and 28 per cent were males. The comparable figures for non-recipients were 70 and 30 per cent. The mean age of recipients on 1 October 2002 or 2003 (at the beginning of their third year of study) was 20.9 (median 20.8) and of non-recipients 21.0 (median 20.8).
- ♦ In terms of their reported ethnic background OB recipients and non-recipients were broadly similar.
- ♦ At the time they applied for a place in higher education, 91 per cent of OB recipients reported that they had lived with their mother and 56 per cent with their father. The comparable figures for non-recipients were 92 per cent and 67 per cent. More non-recipients than recipients reported that they had been living with both parents (62 per cent versus 51 per cent).

Higher education institution attended and qualifications

- ♦ Over four out of ten OB recipients (44 per cent) and non-recipients (49 per cent) reported attending pre-1992 institutions; 52 per cent of recipients and 48 per cent of non-recipients reported attending post-1992 institutions; and two per cent and three per cent respectively attended further education sector colleges. One per cent of OB recipients also reported attending 'other' higher education institutions (such as specialist colleges).

Attitudes towards higher education studies

- ♦ OB recipients and non-recipients expressed broadly similar views about their educational studies. However, more recipients disagreed with the statement 'I do not feel that I can afford to continue with my studies' (59 per cent versus 43 per cent). This difference was statistically significant.
- ♦ Broadly similar proportions of recipients and non-recipients reported that they had worked in a part-time job during term time (61 per cent and 66 per cent respectively). The mean number of hours worked in a normal week was also broadly similar for both groups.

Financial situation

- ◆ Eighty-four per cent of OB recipients and non-recipients reported having a bank overdraft facility. The reported mean amount of the overdraft at the end of the previous month was higher for non-recipients than recipients (£1,018 versus £731); this difference was statistically significant.
- ◆ Broadly similar percentages of OB recipients and non-recipients reported having a credit card. The mean balance at the end of the previous month was also broadly similar for both groups.
- ◆ Similar proportions of recipients and non-recipients reported that they had applied for a student loan for the second year of their studies. The mean amount of the student loan was broadly similar in both groups.
- ◆ Students were asked if they received money from their family to help with living costs during the second year of their course. More non-recipients than recipients reported receiving money from their family and they also received more per week (median of £30 for non-recipients and £25 for recipients); these differences were statistically significant.

Attitudes towards Opportunity Bursaries

- ◆ Almost nine out of ten Opportunity Bursary recipients (88 per cent) reported that the OB had made them less worried about meeting the costs of studying. Two-fifths reported that they worked fewer hours in a part-time job and about a quarter that they did not have to take up a part-time job as a result of the bursary. More than a quarter reported that the bursary enabled them to live away from home.
- ◆ In terms of the non-recipients, more than nine out of ten students (96 per cent) reported that a bursary would have made them less worried about meeting the costs of studying, around six out of ten that they would have worked fewer hours in a paid job if they had had a bursary and about a half indicated that they would not have had to take up a part-time job. Just over a quarter considered that having the bursary would have enabled them to live away from home.
- ◆ Interestingly, the hours worked in a part-time job were broadly similar for both OB recipients and non-recipients although recipients perceived that having an OB had enabled them to work fewer hours than would otherwise have been the case. This seeming paradox may be explained by the finding that having an OB appears to make recipients more positive towards their studies and other aspects of their life.

Conclusions

- ◆ The evidence from this survey suggests that the Opportunity Bursary scheme continued to meet its objectives in the second year of students' studies in terms of helping to meet the costs associated with higher education. Whilst the same percentage of recipients and non-recipients had a bank overdraft facility, the amount of the overdraft was lower for recipients than non-recipients; in addition, parents of recipients were

reported to make lower financial contributions than those of non-recipients.

- ◆ In spite of its relatively modest value, the Opportunity Bursary was viewed positively by recipients. Given that concern has been expressed in some circles that variable fees, due to be introduced from 2006, may deter students from more disadvantaged groups entering higher education, the findings suggest that the new Higher Education Grant (introduced in September 2004) should also have a positive effect in relation to those groups who are currently under-represented in higher education.

1. AIMHIGHER: EXCELLENCE CHALLENGE

1.1 Strands of Aimhigher: Excellence Challenge

The original Aimhigher: Excellence Challenge programme was for a duration of three years, beginning in September 2001 (when it was known as Excellence Challenge). The programme built on the widening participation strategy funded by the Higher Education Funding Council for England (HEFCE).² The aim of the programme was to increase and widen participation in higher education among young people, including the number of young people from poorer backgrounds, who applied for and entered higher education. Another key related aim was to improve the links between schools, colleges and universities. The programme strands are shown in Figure 1.

Figure 1. Strands of the programme

- ◆ **Strand 1** funded a range of activities in schools and colleges to provide the encouragement and support that young people need to increase attainment, raise aspirations and successfully apply to university.
- ◆ **Strand 2** provided extra money to universities and other higher education providers for summer schools, outreach work and to help institutions with the extra costs involved with supporting students who come from areas with low participation rates in higher education.
- ◆ **Strand 3**, the Young People's Publicity Campaign provided advice and information and promoted higher education to young people from disadvantaged backgrounds in a variety of ways.
- ◆ **Strand 4** provided extra financial support for students through 26,000 Opportunity Bursaries each worth £2,000 over three years.
- ◆ **Strand 5** is the evaluation of the programme; this is being carried out by a consortium comprising the National Foundation for Educational Research, the London School of Economics and the Institute for Fiscal Studies.
- ◆ **Strand 6** provided payments, through the student associates pilot programme to undergraduates to do work in schools and further education colleges; the aim was that they would provide role models for young people and help them to learn more about higher education.

Source: DfES (reported in West *et al.*, 2003b)

² See Higher Education Consultancy Group (HECG) & National Centre for Social Research (NCSR), 2003.

1.2 Evaluation of Aimhigher: Excellence Challenge

The evaluation of the Aimhigher: Excellence Challenge programme (formerly Excellence Challenge) is being carried out on behalf of the Department for Education and Skills (DfES) by a Consortium comprising the National Foundation for Educational Research, the London School of Economics and the Institute for Fiscal Studies. The programme was initially established in 2001 (and was known at that time as Excellence Challenge) with the aim of improving access to higher education for able young students from poorer backgrounds. The White Paper, *'The Future of Higher Education'* (DfES, 2003) made a commitment to bring Aimhigher: Excellence Challenge and Aimhigher: Partnerships for Progression together to deliver a national outreach programme called Aimhigher (HEFCE, 2004). The White Paper also announced that the coverage of the programme would be widened so that by 2006, 86 new local partnerships would be in place. In addition, the Excellence Challenge programme would be brought together with the Higher Education Funding Council for England (HEFCE) and Learning and Skills Council (LSC) Partnerships for Progression (P4P) initiative, which began in 2003, to deliver a coherent outreach programme, called 'Aimhigher'. This programme has now been established (HEFCE, 2004). In 2003, HEFCE also announced changes to the way in which it funds universities for widening participation activities, replacing the 'postcode premium' (see West *et al.*, 2003a) with the widening participation allocation.

The evaluation is multifaceted with a combination of quantitative and qualitative methods being used to evaluate the programme. Methods include:

- ◆ large-scale surveys of students and tutors in schools and further education sector institutions, in order to provide information about such factors as activities undertaken as part of the Aimhigher: Excellence Challenge programme and students' attitudes towards education; the information obtained from these surveys (combined with administrative data sources) will also be used to look at the impact of Aimhigher: Excellence Challenge on attainment and progression;
- ◆ surveys of higher education providers to establish information about activities aimed at widening participation, and policies and practices in relation to access to higher education and perceived effectiveness;
- ◆ surveys of young people eligible for Opportunity Bursaries to ascertain their characteristics, financial circumstances and experiences;
- ◆ interviews with Aimhigher: Excellence Challenge coordinators;
- ◆ area-based studies of specific partnerships and higher education institutions to explore policy and practice at a local level and the perceived effectiveness of the various strands of the programme.

The overall aim of the evaluation is to explore the effectiveness of the Aimhigher: Excellence Challenge programme in terms of the extent to which it appears to contribute to increasing and widening participation in higher

education. Whilst the quantitative methods will enable associations to be established between activities and outcomes, the qualitative methods will seek to explore the processes involved and identify practice that is perceived to be effective in terms of the overall programme aims. This report forms part of the evaluation of the programme and relates to **Strand Four**, the Opportunity Bursary scheme.

1.3 Opportunity Bursary scheme

The Opportunity Bursary scheme was a new initiative, providing certain eligible students with £2,000 over the course of three years with £1,000 given in the first year and payments of £500 made for the second and third years. Opportunity Bursaries were for young people from low-income backgrounds with little or no family experience of higher education and aimed to help these students meet the initial costs of starting a course in higher education, and to offer them some financial confidence when applying for, and completing their studies in higher education (DfEE, 2000).

Opportunity Bursaries were allocated to all higher education institutions in England with full-time undergraduates, and selected further education colleges providing higher education. For 2001/02 and 2002/03, the bursaries were to be allocated first of all to young people from state schools and colleges in Phase 1 and Phase 2 EiC areas and statutory EAZs, 'provided that the school or college is taking part in the Excellence Challenge programme, and is receiving funding to support this' (DfES, 2002).

It is important to note that more Opportunity Bursaries were allocated to some higher education providers than to others. The number of Opportunity Bursaries allocated was in proportion to their numbers of full-time students from 'low-participating neighbourhoods' (HEFCE, 2000). In both 2001/02 and 2002/03, around two-thirds were allocated to post-1992 institutions and around a third to pre-1992 institutions. In 2001/02 over 6,000 Opportunity Bursaries were allocated; in 2002/03, there were 7,710 Opportunity Bursaries available for higher education institutions (HEFCE, 2002) and another 500 were available to further education colleges participating in the scheme (DfES, 2004a). However, given that there was a limit on the number of bursaries that could be awarded, not all the applicants that met the eligibility criteria could be awarded an Opportunity Bursary.

According to DfES guidance (HEFCE, 2000; DfES, 2001) Opportunity Bursaries could be awarded to those applying for higher education places on full-time undergraduate courses starting after 1 September 2001 who were aged under 21 at the start of the course. Applicants who attended a school or college within an Excellence in Cities area or those living in a statutory Education Action Zone were to be targeted, however, if funding remained after all applicants who met this criterion had been awarded bursaries, other applicants could be considered for an award.

Applicants were also required to meet other criteria related to their residency in the UK and their own or their families income. It was a further requirement that their family should have had little or no experience of higher education (see **Annex C** for further information on eligibility).

1.4 Surveys of Opportunity Bursary applicants

At the beginning of the 2002/03 and 2003/04 academic years respectively, a survey of young people who had applied for and were deemed eligible for Opportunity Bursaries was conducted (see West *et al.*, 2003b; 2005). The intention was to seek the views of around a third of successful Opportunity Bursary (OB) applicants after they had completed the first year of their higher education programme, and an equivalent number of unsuccessful applicants. The overall aim of each survey was to gather information about the characteristics of the successful and unsuccessful applicants, their attitudes towards higher education, their financial situation, reasons for entering higher education and sources of information about higher education.

A follow-up survey of students in each cohort of students after they had completed the second year of their higher education programme was carried out at the beginning of the 2003/04 and 2004/05 academic years respectively; those surveyed were students who had expressed a willingness to take part at the time of the first survey.

This report presents the key findings that emerged from the two follow-up surveys and highlights a number of policy implications. Section 2 provides an overview of the methods adopted and Section 3 presents key findings. Section 4 summarises the main issues that emerged.

2. METHODS

2.1 Procedure

In the academic year 2001/02 126 higher education providers were approached and in 2002/03 140 higher education providers in England were approached; these institutions were selected in conjunction with the DfES and comprised all those providers that had been allocated Opportunity Bursaries for students who commenced their studies at the beginning of the 2001/02 and 2002/03 academic years. The intention was to approach a third of successful Opportunity Bursary applicants in each of the two years and a similar number of applicants, who although eligible, were unsuccessful in obtaining an Opportunity Bursary.

Higher education providers were advised that applicants should be selected at random from amongst those who had applied for, were eligible for and had been successful in gaining an Opportunity Bursary to begin in the academic years 2001/02 and 2002/03. Institutions were also asked to send out questionnaires to an equivalent number of students who had applied for and were eligible for Opportunity Bursaries, but who, because of the limited number of Opportunity Bursaries available had not been selected for the bursary. It was requested that these young people should be matched in terms of their gender and course with those who had been selected for the bursary.³ Questionnaires for distribution to Opportunity Bursary applicants were sent to the institutions and then sent, in the main, to students' home addresses (see West *et al.*, 2003b, 2005).

Respondents were asked to signify their willingness for the research team to contact them again for future surveys. Those who responded positively were asked to provide their contact address. Thus, for the follow-up survey, questionnaires were sent to these students after they had completed the second year of their higher education programme.

2.2 Sample

Of the 1,386 usable questionnaires that were returned from the two surveys of Opportunity Bursary applicants who had started the first year of their higher education studies (in 2001/02 and 2002/03 respectively) (see West *et al.*, 2003b; 2005),⁴ 1,006 students agreed to be re-contacted and were sent a follow-up questionnaire (in Autumn 2003 and 2004 respectively). These students had thus completed the second year of their higher education studies

³ No checks were made to ensure that methods recommended were adopted as this would have created an undue burden on institutions.

⁴ A total 758 for the 2001/02 survey and 628 for the 2002/03 survey.

in 2002/03 and 2003/04 respectively. A total of 648 questionnaires were returned representing a response rate of 64 per cent.

3. KEY FINDINGS

The findings presented in this report relate to 560 respondents (460 OB recipients and 100 non-recipients) who provided usable information. Of these 158 were male and 400 female (no information was provided by two respondents).⁵

The following section presents the main findings to emerge from the two follow-up surveys of Opportunity Bursary applicants including the characteristics of the applicants, their institution and programme of study, their views about higher education, their attitudes towards their higher education studies and support, their financial situation and their views on Opportunity Bursaries. Each sub-section provides information on those young people who were either **recipients** of Opportunity Bursaries or **non-recipients** and who, at the time of the surveys, had completed the second year of their programme.

3.1 Characteristics of Opportunity Bursary applicants

Academic qualifications

Virtually all (99 per cent) OB recipients and non-recipients reported having **taken** General Certificate of Secondary Education examinations (GCSEs), and 85 per cent of recipients and 83 per cent of non-recipients reported having taken General Certificate of Education Advanced (GCE A) levels.⁶ Almost all (99 per cent of recipients and non-recipients) reported **GCSE results**. The mean GCSE point score⁷ at 59.4 was the same for both recipients (N=458) and non-recipients (N=99) and the median was very similar (60.0 versus 61.0).⁸ There were no statistically significant differences between males and females in either group.⁹

⁵ Altogether, 88 questionnaires were excluded from the analysis; 62 students had not entered the second year of their studies it appears that some higher education providers had sent out the first surveys in 2001/02 and 2002/03 to the wrong cohort of applicants; 16 had left higher education before the end of the academic year; six students were on work placement and it was not possible to determine if students had completed their second year in four cases. See also **Annex B**.

⁶ Thirty-nine per cent of recipients and 47 per cent of non-recipients reported having taken GCE AS levels. A minority of recipients and non-recipients (one per cent in each case) reported having taken a foundation level General National Vocational Qualification (GNVQ); an intermediate level GNVQ (six per cent versus seven per cent); or an advanced level GNVQ (13 and 11 per cent respectively).

⁷ One GCSE at grade A* was awarded eight points, grade A seven points, grade B six points and so on.

⁸ Excluding GNVQs.

⁹ All differences reported to be statistically significant are significant at the 0.05 level or beyond (using independent t-test, Fisher's exact test or chi-squared test as relevant).

Eighty-eight per cent of recipients and 86 per cent of non-recipients reported GCE A/AS level results. The mean GCE A/AS level point score¹⁰ was 22.6 for Opportunity Bursary recipients (N=404) and 25.9 for non-recipients (N=86) and the median was 22.0 and 24.5 respectively.¹¹ This difference between the A/AS level point score for recipients and non-recipients was not statistically significant. In neither group were there statistically significant differences between males and females.

Individual characteristics

Of those students who had received OBs and who provided relevant information (N=458), 72 per cent were females and 28 per cent were males.¹² The comparable figures for non-recipients were 70 and 30 per cent (N=100). The mean age of recipients on 1 October at the beginning of their third year of study (1 October 2003 and 1 October 2004 respectively) was broadly similar – 20.9 (median 20.8) and for non-recipients 21.0 (median 20.8).

As shown in Table 1, OB recipients and non-recipients were broadly similar in terms of their ethnic background.

Table 1. Ethnic background of students with and without Opportunity Bursaries

Ethnic background	% OB recipients (N=459)	% OB non-recipients (N=99)
Asian or British Asian – Bangladeshi	3	1
Asian or British Asian – Indian	6	0
Asian or British Asian – Pakistani	5	7
Asian or British Asian – Chinese/Other	3	2
Black or Black British – African/Caribbean/Other	4	4
Mixed – African/Asian/Caribbean/Other	4	3
White – British/Irish/Other	74	82
Other ethnic group	1	1

Ns are less than 460 and 100 for OB recipients and non-recipients as not all respondents provided information.

Home background

At the time they applied for a place in higher education, 91 per cent of OB recipients (N=456) reported that they had lived with their mother and 56 per cent with their father. The figures for non-recipients (N=99) were 92 per cent and 67 per cent respectively (see also **Annex D**). However, more non-

¹⁰ A levels points were calculated using the former tariff system whereby one A level at grade A was awarded ten points, grade B eight points and so on. For AS levels the points were halved.

¹¹ Advanced level GNVQs, which were taken by a minority of students, were excluded.

¹² It was not possible to establish if this distribution was representative as no national data were available on the allocation of OBs to males and females; however, it appears on the basis of other research studies that more females than males tend to respond to surveys such as this (see West *et al.*, 2003b; 2005).

recipients (62 per cent) than recipients (51 per cent) reported that they had been living with both parents (this difference was statistically significant).

Respondents were asked about the employment status of the adults with whom they had lived when they had applied for higher education. Of those OB recipients (N=253) and non-recipients (N=65) who reported that they had been living with their father, 53 per cent and 60 per cent respectively reported that he had been in full-time employment, nine per cent and six per cent respectively that he had been in part-time employment and 38 per cent and 34 per cent respectively that he had not been in work. Of the recipients (N=131) and non-recipients (N=39) whose fathers had been in work, 37 per cent and 38 per cent respectively were reported to have been in non-manual occupations; the majority were in manual occupations (63 and 62 per cent respectively).

Of those OB recipients who reported that they had been living with their mother 32 per cent (N=410) reported that their mother had been in full-time employment compared with 33 per cent of non-recipients (N=90); the figures for those in part-time work were 26 per cent and 40 per cent respectively and for those not in work, 42 per cent and 27 per cent respectively. Of those whose mothers were in work, 64 per cent of recipients (N=126) and 70 per cent of non-recipients (N=30) respectively were reported to have been in non-manual occupations with the remainder having been in manual occupations (36 and 30 per cent respectively).¹³

The percentage of families where both parents were in full-time work was 8 per cent (N=460) for OB recipients and 19 per cent (N=100) for non-recipients (this difference was statistically significant). The percentage of households where one parent was working full-time and one part-time was similar in both groups – 11 per cent (N=460) for OB recipients and 14 per cent (N=100) for non-recipients.

As noted above, Opportunity Bursaries were designed for young people from low-income backgrounds with ‘little or no family experience of higher education’. So, turning to qualifications of the young person’s parents, we asked about the qualification levels of their mother and father. Table 2 provides the highest educational level of the mother (excluding step-mother or father’s partner) for OB recipients and non-recipients. As can be seen, the majority of the applicants’ mothers did not have an undergraduate qualification or postgraduate degree.¹⁴

¹³ The category of ‘sales’ was classified as non-manual.

¹⁴ See **Annex C** for guidance on eligibility criteria for Opportunity Bursaries for students entering higher education in 2001/02.

Table 2. Highest educational level of mother

Highest qualification	% OB recipients (N=374)	% OB non-recipients (N=80)
None	38	26
GCE O levels or equivalent ¹⁵	35	44
GCE A levels	9	7
Professional qualification	13	9
Undergraduate qualification (e.g. BSc, BA, HND)	3	9
Postgraduate degree	2	5

Ns are less than 460 and 100 for OB recipients and non-recipients as not all respondents answered all questions.

Table 3 provides the highest educational level of the father (excluding step-father or mother's partner) for OB recipients and non-recipients. As can be seen, the majority of the applicants' fathers did not have an undergraduate qualification or postgraduate degree, in accordance with the eligibility criteria for Opportunity Bursaries.¹⁶

Table 3. Highest educational level of father

Highest qualification	% OB recipients (N=276)	% OB non-recipients (N=63)
None	43	40
GCE O levels or equivalent	32	35
GCE A levels	9	6
Professional qualification	7	14
Undergraduate qualification (e.g. BSc, BA, HND)	5	3
Postgraduate degree	4	2

Ns are less than 460 and 100 for OB recipients and non-recipients as not all respondents were able to provide details.

Similar proportions of OB recipients and non-recipients (44 per cent and 40 per cent respectively) reported that they lived with their parents during term time.

The findings suggest that there was no systematic bias in terms of the characteristics of non-recipients compared with recipients.

¹⁵ General Certificate of Education Ordinary (GCE O) levels and Certificate of Secondary Education (CSE) qualifications were replaced by the General Certificate of Secondary Education (GCSE) in 1988.

¹⁶ See **Annex C**.

3.2 Institution and programme of study

Forty-four per cent of OB recipients were studying at a pre-1992 institution, 52 per cent at a post-1992 institution, one per cent at ‘other’ higher education institutions (such as specialist colleges) and two per cent at further education colleges.¹⁷ Forty-nine per cent of non-recipients were studying at a pre-1992, 48 per cent at a post-1992 institution and three per cent at a further education college (none were studying at ‘other’ institutions).

Respondents were asked to provide details of the higher education programmes they were studying. As can be seen from Table 4 around half the students were studying for a BA degree and around one third for a BSc degree, with smaller proportions studying for other degrees or diplomas.

Table 4. Programme of study

Programme being studied	% OB recipients (N=457)	% OB non-recipients (N=100)
BA	48	55
BSc	34	28
LLB	4	2
HND	3	1
Other (BEng, Bmus, BEd, MBBS, combined etc.)	11	14

BA is Bachelor of Arts, BSc Bachelor of Science, LLB Bachelor of Laws, HND Higher National Diploma, BEng Bachelor of Engineering, BMus Bachelor of Music, BEd Bachelor of Education, MBBS Bachelor of Medicine and Bachelor of Surgery.

N is less than 460 for OB recipients as not all recipients answered the question.

Students were also asked which subject they were studying; as shown in Table 5 the highest proportion of students was studying more than one subject.¹⁸

¹⁷ Percentages do not always add up to 100 because of rounding.

¹⁸ The two first surveys of Opportunity Bursary Applicants (West *et al.*, 2003b; 2005) indicated that students who applied for an Opportunity Bursary were more likely to be accepted to study combined degrees than other students in England.

Table 5. Subjects studied

Subject	% OB recipients (N=456)	% OB non-recipients (N=100)
Medical sciences, subjects allied to medicine, biological and veterinary sciences	21	17
Social studies, law, business studies, mass communication	20	11
Physical sciences, mathematics, computer sciences, engineering, technologies, architecture	14	13
Linguistics, languages, literature, historical and philosophical studies, education	10	15
Creative arts and design	10	14
Combined subjects	25	30

N is less than 460 for OB recipients as not all respondents answered this question.

3.3 Views about higher education

Respondents were asked about some of the issues that people might think about in relation to studying in higher education. They were presented with a series of statements and asked how much each applied to them now that they had completed the second year of their higher education programme. They were given the following options: 'strongly agree', 'agree', 'neither agree nor disagree', 'disagree', 'strongly disagree'. Table 6 gives the percentage of OB recipients and non-recipients who reported that they 'agreed' or 'strongly agreed' with each statement.

Table 6. Percentage of students agreeing with statements about higher education

Views about higher education	% OB recipients (N=457-459)	% OB non-recipients (N=99-100)
I made the right decision to go on to higher education	90	87
I am worried about getting into debt	86	93
I am confident that the long term financial benefits would outweigh the costs of doing the course	63	53
I worry about combining studying with a job	61	70

Ns are less than 460 and 100 for OB recipients and non-recipients as not all respondents answered all questions.

As can be seen from Table 6, around nine out of ten students reported that they agreed with the statements 'I made the right decision to go on to higher education' and 'I am worried about getting into debt'. Over half of

respondents agreed with the statement ‘I am confident that the long term financial benefits outweigh the costs of doing the course’ and over six out of ten agreed with the statement ‘I worry about combining studying with a job.’ There were no statistically significant differences between the views of OB recipients and non-recipients.

3.4 Attitudes towards higher education studies and support

A series of questions was asked to find out about students’ attitudes towards higher education and any support they had received in their second year of study. Respondents were presented with a series of statements in order to establish their views about their educational studies and were asked whether they agreed or disagreed with each one. They were given the following options for each statement: ‘strongly disagree’, ‘disagree’, ‘neither agree nor disagree’, ‘agree’ or ‘strongly agree’.

Table 7 gives the percentage of respondents who reported that they ‘agreed’ or ‘agreed strongly’ with these statements and Table 8 shows those who ‘disagreed’ or ‘disagreed strongly’ with them.

Table 7. Views about higher education studies – agree with statements

Statement...	% OB recipients (N=432-454)	% OB non-recipients (N=95-100)
I feel that I gained new knowledge	96	95
I got on well with other students	92	95
I feel that I learned new skills	91	90
I was happy with the institution I attended	89	84
I enjoyed my course	90	89
I got on well with my teachers/lecturers	82	88
Sometimes I had difficulty keeping up with my studies	52	51
Studying was harder than I expected	37	40
I feel that part-time work interfered with my studies	43	53
My course was easier than I expected	7	2
I do not feel that I can afford to continue with my studies	12	17
I wish I could have changed the course I was studying	9	8
I wish I could have transferred to another institution	7	6

Ns are less than 460 and 100 for OB recipients and non-recipients as not all respondents answered all questions.

Table 8. Views about higher education studies – disagree with statements

Statement...	% OB recipients (N=432-454)	% OB non-recipients (N=95-100)
I wish I could have transferred to another institution	83	81
I wish I could have changed the course I was studying	74	82
I do not feel that I can afford to continue with my studies	59*	43*
My course was easier than I expected	68	68
Sometimes I had difficulty keeping up with my studies	30	28
Studying was harder than I expected	29	28
I feel that part-time work interfered with my studies	29	21
I was happy with the institution I attended	5	4
I enjoyed my course	3	1
I got on well with other students	2	1
I feel that I learned new skills	2	3
I got on well with my teachers/lecturers	2	1
I feel that I gained new knowledge	1	2

Ns are less than 460 and 100 for OB recipients and non-recipients as not all respondents answered all questions. Figures in bold and asterisked signify that the difference between OB recipients and non-recipients is statistically significant at the 0.05 level or beyond using Fisher's exact test.

As can be seen from the two tables, the views of Opportunity Bursary recipients and non-recipients were generally similar. However, there was one statistically significant difference between the two groups in Table 8 with more recipients than non-recipients *disagreeing* with the statement 'I do not feel that I can afford to continue with my studies' (59 per cent versus 43 per cent).

Broadly similar proportions of recipients and non-recipients reported that they had worked in a part-time job during term time (61 per cent and 66 per cent respectively). The mean number of hours worked in a normal week was also broadly similar for both groups of students – 13.6 hours (median 13.0) for recipients of Opportunity Bursaries (N=266) and 15.0 hours (median 14.0) for non-recipients (N=64).

Students were then asked about the support that they had received at their institution during the second year of their studies. Their responses are given in Table 9.

Table 9. Support received by students

Support received	Received support % OB recipients (N=460)	Received support % OB non-recipients (N=100)
Support from my individual tutor	60*	76*
Support from an academic member of staff	55	56
Financial support	35*	23*
Support by another student(s) (e.g. mentoring)	19	22
Financial advice	14	8
Support from student union (e.g. welfare staff)	11	9
Counselling	9*	2*
Other (e.g. family, friends, other HE staff)	3	2

Figures in bold and asterisked signify that the difference between OB recipients and non-recipients is statistically significant at the 0.05 level or beyond using Fisher's exact test.

As shown in Table 9, students most often reported that they had received support from their tutor or from academic members of staff. There were three statistically significant differences between OB recipients and non-recipients: fewer recipients than non-recipients reported help from their individual tutor; more recipients reported financial support (this could merely be an acknowledgement by these students that they received an OB); and more recipients reported receiving counselling (there is no obvious explanation for this finding).

The vast majority of students found the support that they received helpful as shown in Table 10 (only those forms of support received by at least ten per cent of respondents are reported).

Table 10. Helpfulness of support received

Support received	Found support helpful % OB recipients (N=49 to 275)	Found support helpful % OB non-recipients (N=8-73)
Financial support	96	95
Support from an academic member of staff	94	93
Support from my individual tutor	89	89
Support by another student(s) (e.g. mentoring)	87	91
Financial advice	79	75
Support from student union (e.g. welfare staff)	71	75

N is less than 460 and 100 for OB recipients and non-recipients as this table only relates to those who reported receiving support.

Table 10 shows that both OB recipients and non-recipients held very similar views in relation to the helpfulness of the support that they had received.

3.5 Financial situation

Respondents were asked a series of questions about their financial circumstances. Eight-four per cent of both OB recipients (N=459) and non-recipients (N=100) reported having a bank overdraft facility. The mean amount of the overdraft for these students at the end of the previous month was lower for recipients (£731 (N=380)) than for non-recipients (£1,018 (N=82)); this difference was statistically significant.

Broadly similar percentages of OB recipients and non-recipients reported having a credit card – 48 per cent of recipients (N=458) and 53 per cent of non-recipients (N=100). Similar proportions of students (53 per cent of recipients and 58 per cent of non-recipients) reported paying off the whole balance each month. For those who did not pay off the whole balance each month, the mean balance was £920 (N=21) for non-recipients and £657 (N=96) for recipients (this difference was not statistically significant).

Similar proportions of OB recipients and non-recipients reported that they had applied for a student loan for the second year of their studies (90 per cent versus 88 per cent). The mean amount of the student loan was broadly similar for both groups – £7,831 for recipients (N=401) and £8,058 for non-recipients (N=82).

Students were asked if they had received money from their family to help with living costs during the second year of their studies. Fewer OB recipients than non-recipients reported that they had received such help (40 per cent versus 24 per cent). This difference was statistically significant. The amount received per week was also higher for non-recipients than for recipients (mean £36 (N=29) and £27 (N=79) respectively; median £30 and £25 respectively); this difference was also statistically significant.

As mentioned above, similar proportions of OB recipients and non-recipients (61 per cent and 66 per cent respectively) reported that they had a part-time job and worked a similar number of hours. (The median number of hours worked was 13.0 for recipients and 14.0 for non-recipients.) The mean amount earned per hour was also similar at £5.39 per hour for recipients (N=267) and £5.13 for non-recipients (N=64).

Students were also asked about any other financial support that they had received (other than an Opportunity Bursary). The results are shown in Table 11. As can be seen, relatively few students reported other forms of financial support.

Table 11. Financial support reported by students

Financial support...	% OB recipients (N=130)	% OB non- recipients (N=28)
Own savings	33	36
Hardship/bursary award from university/higher education institution	35*	14*
Loan from university/higher education institution	15	4
Scholarship from institution	7	14
Scholarship from a charitable foundation	7	11
Other (e.g. NHS bursary, bank overdraft)	26	29

N is less than 460 and 100 for OB recipients and non-recipients as this table only relates to those who reported receiving support. Figures in bold and asterisked signify that the difference between OB recipients and non-recipients is statistically significant at the 0.05 level or beyond using Fisher's exact test.

Whilst both OB recipients and non-recipients reported using their own savings to a similar extent, there was one statistically significant difference between the two groups with more recipients than non-recipients reporting that they received help in the form of a hardship/bursary award from their institution (this could be a result of some OB recipients identifying their Opportunity Bursary in this category).

One of the aims of the Opportunity Bursary scheme was for the bursary to help students meet some of the costs of starting and continuing their studies in higher education. We therefore asked OB recipients whether or not they felt that certain statements were 'true', 'false' or 'not relevant'. The percentages of students reporting that each statement was 'true' are shown in Table 12.

Table 12. Percentages of OB recipients reporting statements to be true

Statement...	% (N=451-458)
Obtaining the Opportunity Bursary made me less worried about meeting the costs of studying at university/higher education institution	88
The Opportunity Bursary enabled me to continue studying	54
The Opportunity Bursary meant that I worked fewer hours in a paid job than I would otherwise have had to	41
Receiving the Opportunity Bursary enabled me to live away from home	29
The Opportunity Bursary meant that I did not have to take up a part-time job	24

N is less than 460 as not all respondents answered this question

As can be seen, almost nine out of ten students reported that having an Opportunity Bursary had made them less worried about meeting the costs of studying at university. Approximately half reported that the bursary had

enabled them to continue studying and about two-fifths reported that the bursary allowed them to work fewer hours in a paid job than they would otherwise have had to. Around a quarter reported that the bursary meant that they did not have to take up a part-time job.

Students who had not received an Opportunity Bursary were also asked whether or not they felt a similar set of statements to be 'true', 'false' or 'not relevant'. The percentages of students reporting each statement to be 'true' are presented in Table 13.

Table 13. Percentages of OB non-recipients reporting statements to be true

Statement...	% (N=94-100)
Obtaining an Opportunity Bursary would have made me less worried about meeting the costs of going to university/higher education institution	96
With an Opportunity Bursary I would have worked fewer hours in a paid job	59
With an Opportunity Bursary I would not have had to take up a part-time job	48
Receiving the Opportunity Bursary would have enabled me to live away from home	27

N is less than 100 as not all respondents answered this question

As can be seen from Table 13, more than nine out of ten students who had not received Opportunity Bursaries reported that a bursary would have made them less worried about meeting the costs of going to university. Almost six out of ten reported that they would have worked fewer hours in a paid job if they had had a bursary and about half indicated that they would not have had to take up a part-time job.

It is interestingly to note that the reported hours worked by OB recipients and non-recipients were broadly similar even though recipients perceived that having an OB had enabled them to work fewer hours than would otherwise have been the case. This seeming paradox may be explained by the finding that having an OB appears to make recipients more positive towards their studies and other aspects of their life (see West *et al.*, 2003b and West *et al.*, 2005).

3.6 Students' views of Opportunity Bursaries

In an open-ended question OB recipients were asked how receiving an Opportunity Bursary of £1,000 in their first year and another £500 in their second year had affected their studies.¹⁹ Wide-ranging comments were made

¹⁹ When the students filled in questionnaires they would not have received the final payment of £500 for their third year.

by two-thirds of the recipients who, in the main, emphasised the benefits of receiving the bursary.

Of the particular benefits described, recipients related how the bursary had reduced the worry of attending university particularly in terms of costs and incurring debt; allowed them to concentrate on their studies; and met or helped meet some of the specific expenses associated with higher education, such as the purchase of equipment (including computers), textbooks and in meeting travel costs. Having the bursary meant, for some, that they did not need to take up a part-time job or could work fewer hours. A selection of comments is given in Figure 2.

Figure 2. Benefits of the Opportunity Bursary

The Opportunity Bursary I received was a vital part of my university life. Without it I might not have been able to continue studying.

[The OB] put me on a more equal footing with friends who did not have financial worries.

Obtaining the bursary enabled me to focus on my studies without having to worry about buying my books etc.

I come from a poor background – single parent family – and have to support myself if I want to get a degree. The Opportunity Bursary really helped me get started in the first year and it is excellent, as I do not have to pay it back.

I was very grateful to receive the bursary as it helps me afford course materials (i.e. lab coats, textbooks) without these I would probably have a large overdraft by now.

The bursary helped me a lot especially in the first year of university when it enabled me to live away in halls. The amount reduced to £500 in the second year when I had to move back home. The bursary took the pressure of my finance a little meaning that I didn't have to work as many hours in my part-time job.

Having the Opportunity Bursary has enabled me to support myself through uni... This money has enabled me to come to uni; it has been my lifeline.

A number of the comments were directed towards the bursary itself in terms of the overall amount of the award (£2,000) and the instalment method adopted. Some students felt that the bursary should be larger overall while some felt that the largest instalment (£1,000) should be paid in the third year rather than the first; others, however, were happy with the existing arrangement as the extra amount had helped them settle into university life. A number of students who were studying on four-year courses considered that there should be an additional payment for the fourth year of study. A selection of comments is given in Figure 3.

Figure 3. Opportunity Bursary funding

It has been helpful but the amount of money available is not a lot as most students get significant financial support from their parents whereas those whose parents are less rich find university a struggle financially.

It does help but considering that an average student ends up on average with a £10,000 debt from loans, £2,000 over the three years doesn't aid low-income students sufficiently.

It would benefit students if the bursary was £3,000 and then given £1000 for each year of study...

The structure of the payments works well as in the first year of university students aren't always aware of the costs and can get into financial trouble...

It would be better if it was £500 in year 1 and 2 and then £1000 in year 3; there are more debts in the final year...

My course is four years and I think I would have benefited if this was taken into account. For example, by giving me £500 each year or making extra provision for students on a four-year course.

Students who had not received an Opportunity Bursary were asked how having one **would** have affected their studies; about two-thirds of non-recipients made one or more comments. Generally, their views tended to reflect those of OB recipients in that they felt that having a bursary would have removed some debt worries, would have removed or reduced the need for part-time work and would have helped with some of the expenses associated with higher education and moreover would have enabled them to concentrate more upon their studies. The issue of the fairness of the distribution of Opportunity Bursaries was also raised by various respondents. The comments made included those in Figure 4.

Figure 4. How an Opportunity Bursary would have helped

I've basically run out of money now (my own savings). If I'd had the Opportunity Bursary it would have saved me a lot of the stress of having to go into overdraft or borrow from my family. I could have got through my degree debt free.

It would have considerably eased my money worries. My younger sister received an Opportunity Bursary at Newcastle University (we both started uni at the same time) and she said it helped her a lot.²⁰

I am a young carer. My parents are pensioners and me being at college has been very hard financially and to be told that I could not get a bursary because I did not live on a run down estate... I am the first person in our family ever to go on to higher education.

I possibly would not have needed to take a year out to work full-time to pay for my studies.

It would have allowed me to worry less, and I'm now entering my most important year but debts mean I will need to get a job – I'm worried about the effect on my studies as I'm a borderline first.

In the first year of my...course, I was unable to buy the books required for the course until I got my wages from work. I do work too many hours a week, I have no time to study as I have to be at university 9.00-5.00 nearly every day. I get up early, go to bed late and travel by bus so I can't even study on that.

²⁰ It is quite possible that one sibling was in receipt of an OB and the other was not as OB decisions were made by individual institutions on the basis of government guidance but there was some discretion (see **Annex C**); the supply of OBs was limited as each institution received a fixed number to award and this number varied; the demand for OBs also varied between institutions.

4. SUMMARY AND POLICY IMPLICATIONS

This report presents the findings from the two follow-up surveys of students who applied for and were eligible for Opportunity Bursaries in 2001/02 and 2002/03. These two surveys were carried out after students had completed the second year of their higher education programme.

Both Opportunity Bursary recipients and non-recipients were broadly similar in terms of their academic qualifications. Their background characteristics were also comparable; in both groups more females than males responded, their ethnic background was broadly similar, and similar proportions reported that they had been living with their mother when they applied for a place in higher education. A significant minority of the students' parents were not in work. Of those who were in work the majority of fathers were in manual work; the majority of mothers were in non-manual occupations (largely as a result of being in administrative, clerical and sales occupations). Very few parents had experience of higher education.

More students who responded were from post-1992 than from pre-1992 institutions. Around half of the students in both groups were studying for a BA degree, with somewhat fewer studying for a BSc degree. Small proportions of students were studying for other degrees/diplomas (e.g. LLB, BEd or HND).

In several respects there were differences between recipients and non-recipients in their reported financial circumstances. In particular, OB recipients had, on average, a lower bank overdraft than non-recipients; they also reported receiving less support from their families than non-recipients to help with their living costs – the families of non-recipients appeared to be subsidising their children's higher education given the lack of other financial support.

The attitudes of recipients and non-recipients were similar in relation to higher education and their studies. In terms of students' attitudes towards Opportunity Bursaries nearly nine out of ten of those who **had received an Opportunity Bursary** reported that the bursary had made them less worried about meeting the costs of going to university and over half reported that it had enabled them to continue studying. Virtually all those students who **had not received Opportunity Bursaries** reported that a bursary would have made them less worried about meeting the costs of going to university.

Respondents were also asked to comment on how having or not having a bursary had affected their studies. These comments tended to reinforce the suggestion that OB recipients, on the whole, had approached higher education in a positive frame of mind even though the Opportunity Bursary made a relatively modest contribution to the costs of higher education.

In summary, the key findings to emerge from this study are that the Opportunity Bursary, in spite of its relatively modest value, appears to have continued to meet its objectives for recipients who had completed the second year of their studies. Students who had received Opportunity Bursaries reported lower levels of debt (bank overdraft) than non-recipients; in addition, parents of recipients made lower financial contributions than those of non-recipients. Recipients continued to hold very positive views about the Opportunity Bursary.

Given that concern has been expressed in some circles that variable fees, due to be introduced from 2006, may deter students from more disadvantaged groups entering higher education, the findings suggest that the new Higher Education Grant (introduced in September 2004) and other funding made available by higher education institutions following the passing of the Higher Education Act 2004 (see DfES, 2004b), should also have a positive effect in relation to groups that are currently under-represented in higher education.

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ACKNOWLEDGEMENTS

We would like to thank all those who assisted with this research, in particular, those young people who applied for Opportunity Bursaries and who completed and returned questionnaires, and the higher education institutions and further education colleges that kindly agreed to distribute questionnaires to Opportunity Bursary applicants at the end of students' first year. We are also grateful to DfES officials and to Marian Morris for helpful comments. The support of other colleagues at NFER is also much appreciated.

ANNEX A TIMETABLE AND RESPONSE RATE

Table A1. Survey timetable: Follow-up of second year students who applied for an Opportunity Bursary 2001/02

Activity	Timing
Letter and questionnaire despatched to respondents who were willing to be re-surveyed	24/11/03
Reminder letter and questionnaire despatched	5/1/04

Table A2. Response rate: Follow-up of students who applied for an Opportunity Bursary in 2001/02

Activity	Number	%
Number of respondents contacted	529	100
Letters returned by Post Office as undeliverable	15	3
Number of completed questionnaires returned	308	58

Table A3. Survey timetable: Follow-up of students who applied for an Opportunity Bursary in 2002/03

Activity	Timing
Letter and questionnaire despatched to respondents who were willing to be re-surveyed	27/08/04
Reminder letter despatched	10/09/04
Second reminder despatched with second questionnaire	16/11/04

Table A4. Response rate: Follow-up of students who applied for an Opportunity Bursary in 2002/03

Activity	Number	%
Number of respondents contacted	477	100
Letters returned by Post Office as undeliverable	8	2
Refused to take part	1	0
Number of completed questionnaires returned	340	71

ANNEX B Reasons for exclusion from analysis

Table B1. Reasons for exclusion of respondents from analysis

Reason for exclusion from analysis	Total Number	OB recipients	OB non-recipients
Studying GCE A levels/AVCE (1)	62	0	62
'Dropped out'	16	4	12
Work placement in second year of studies	6	6	0
Other	4	3	1
Total	88	13	75

(1) It appears that higher education providers sent out questionnaires to the wrong cohort of applicants (see West et al 2003b; 2005).

Reasons for not continuing with higher education

Respondents were invited to explain the reasons why they had decided not to continue with their higher education programmes. These were various and related to personal issues such as personal illness or family difficulties or to problems associated with courses or places of study. In some cases students did not complete the second year of their course but planned to return to study subsequently on their original or on a different course and on a full-time or part-time basis. In several other cases **financial factors** were cited as the main factor in their decision not to complete their second year of study:

Figure B1. Reasons for stopping studying

I did not continue due to lack of money [without Opportunity Bursary; stopped studying December 2002].

I could not afford to continue studying [without Opportunity Bursary; stopped studying February 2004].

The Opportunity Bursary helped me fund going to university. However, I still couldn't afford to stay at university once the money had run out [stopped studying in 2003/04].

ANNEX C OB GUIDANCE ON ELIGIBILITY

Who was eligible for an Opportunity Bursary?

According to guidance on Opportunity Bursaries, bursaries could be awarded to applicants for higher education places on full-time undergraduate courses starting after 1 September 2001, who were aged under 21 at the start of the course. Institutions were advised that they should allocate funding for Opportunity Bursaries initially to applicants attending a school or college within one of the Excellence in Cities (EiC) areas.²¹ However, if having awarded Bursaries to all applicants who met this criterion, institutions that still had funding available could award bursaries to applicants from schools or colleges outside EiC areas, as long as they met all the other criteria. This included applicants resident in Wales, Scotland and Northern Ireland. Institutions were also advised that they should give priority to any applicants in local authority care, and whose circumstances meant that they would particularly benefit from the award of a bursary (HEFCE, 2000).

Extracts from HEFCE (2000)

‘Applicants **must** meet the following criteria:

a. **Residency:**

- ♦ they are home students, that is they have been resident in the United Kingdom and Islands for three years prior to the start of the course and have settled status within the UK. They should not have been resident here for only the purposes of education; or
- ♦ they are the children or spouses of migrant workers who have been resident within the European Economic Area for the three years prior to the start of the course; or
- ♦ they have refugee status; or
- ♦ they have been given exceptional leave to remain by the Home Office (and have been resident in the United Kingdom and Islands for the three years prior to the start of the course).

b. **Experience of higher education:**

- ♦ their family has had little or no experience of higher education, for example if neither parent has a degree qualification or attended university. (N.B. institutions should look sympathetically at applicants where a parent or older sibling is currently undertaking a course of HE study.)

²¹ In later guidance (DfES, 2001) eligibility was extended to those living in statutory Education Action Zones.

c. Family income:

- ◆ they are in receipt of an Education Maintenance Allowance (EMA) which is above or equivalent to the amount payable where the family income is below £20,000; or
- ◆ their family²² has a gross income before tax of less than £20,000 or receives any of the following means-tested state benefits:²³

Income Support, Housing Benefit, Jobseekers' Allowance, Working Families Tax Credit, Disabled Person's Tax Credit, Incapacity Benefit, Severe Disablement Allowance, Industrial Injuries Benefit, Disability Working Allowance.

Institutions may also wish to take into account whether applicants have taken part in a university summer school or Compact scheme or other HE widening access scheme. It is not essential for bursary applicants to have done so but this may be a good indicator of their motivation and suitability for an HE course. (Institutions will be aware that the DfEE's HE summer school programme was only available in EiC areas in 2000.)' (HEFCE, 2000).

²² In later guidance (DfES, 2001) only the income available to the family the applicant was living with was looked at. For applicants from foyers (these provide accommodation for young people along with help in finding employment, education or training) or local authority care, their own income was assessed.

²³ In later guidance (DfES, 2001) if an individual's sole income was from specified non-means tested benefits, then the applicant met the OB criteria. If this was not the sole income, the institution had to be satisfied that the applicant's income was less than £20,000.

ANNEX D SUPPLEMENTARY TABLE

Family characteristics of students

Table D1. Who applicants lived with when they applied for higher education

Who applicant lived with...	% OB recipients (N=456)	% OB non-recipients (N=99)
Mother	91	92
Father	56	67
Step-mother (or father's partner)	1	0
Step-father (or mother's partner)	6	8
Another adult	4	3
Own children	1	1
Other living arrangements	2	0

Ns are less than 460 and 100 for OB recipients and non-recipients as not all respondents answered all questions.

Copies of this publication can be obtained from:

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P.O. Box 5050
Sherwood Park
Annesley
Nottingham
NG15 0DJ

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Online: www.dfespublications.gov.uk

© National Foundation for Educational Research 2006

Produced by the Department for Education and Skills

ISBN 1 84478 658 7
Ref No: RR710
www.dfes.go.uk/research