



ACCESS AND PARTICIPATION MONITORING AND EVALUATION

BURSARIES RESEARCH AND IMPACT EVALUATION

February 2023 - Jess Burchell, Research and Evaluation Officer

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EXECUTIVE SUMMARY

Bursaries are non-repayable, non-competitive financial support. This report focuses on the University of York's [York Bursary](#) and [Foundation Year Bursary](#). Bursaries were introduced in 2006/07 to mitigate the assumed risk that increased tuition fees would discourage students from low-income families from accessing higher education.

We consider each stage of the students lifecycle in the impact of bursaries:

- **Access:** The underlying assumption for the introduction of bursaries is inaccurate. There is little evidence indicating that bursaries impact students' access to higher education. This is due to the bursary system being too complicated, students not engaging with information and students stating that attending university is an academic decision, not a financial one.
- **Continuation:** There is strong evidence to suggest that bursaries have an impact on students' continuation - either 'levelling the playing field' or increasing continuation rates. This is due to intermediate factors such as part-time work, wellbeing and sense of belonging.
- **Awarding:** There is a small amount of evidence that bursaries have a positive impact on awarding rates of a 'good degree'. The evidence primarily related to intermediate factors, such as part-time work and wellbeing.
- **Progression:** There is no research regarding bursaries' impact on students' progression beyond undergraduate study. There is discussion of bursaries' impact on work experience and the lack of financial support at the postgraduate level.

We also consider the impact of the administration of bursaries:

- **Amount:** Evidence suggests there is an optimal amount of financial support - approximately £1,900 per year. Additionally, research suggests that there is a misallocation of aid across the sector - typically, students from the lowest household incomes are not provided with sufficient aid and middle income students are provided with higher than optimal aid.
- **Threshold:** There is evidence that bursaries impact students from the lowest household income brackets (up to £25,000) the most. There is also evidence of impact up to a household income of £40,000.
- **Format:** Overwhelmingly, the evidence suggests that students prefer cash payment bursaries. Cash payments alleviate immediate concerns and allow students the flexibility to influence the intermediate factors which impact continuation and awarding.

As part of the impact evaluation, we conducted a review of other institutions:

- **Format:** Cash payments are the most common format of bursaries across other institutions. The University of York is unusual in offering an accommodation discount as the primary payment format.
- **Foundation Year Bursary:** Very few institutions offer a bursary specifically for foundation year students. Additionally, the University of York offers the largest bursary amount within our review of other institutions and we are unusual in not having an upper threshold for household income as part of our eligibility criteria.
- **Amount and Threshold:** The University of York is unusual in offering near equivalent amounts of financial support across its different eligibility criteria thresholds - the amount of bursary differs by only £100 in the second and subsequent years for the two household income thresholds. Also, only one other institution could be identified that offers a varying amount from first to second year. There is also scope to review the upper household income threshold, with some institutions providing support up to £42,875.

Our recommendations are as follows:

- 1a. Adjust the amount offered by the York Bursary so that those in the lowest household income threshold receive more than those in the higher threshold.
- 1b. Adjust the amount offered by the York Bursary to be consistent across years of study within a household income threshold.
- 2. Offer the York Bursary as a cash payment.
- 3. Remove the Foundation Year Bursary and apply the York Bursary to foundation year students.
- 4. Increase the upper household income threshold or add a third household income bracket.
- 5. Introduction of a Masters Bursary.

INTRODUCTION

A bursary is defined as non-repayable financial support, based on specific criteria usually related to personal circumstances, which a student does not need to apply for (i.e. it is non-competitive)¹. This differs from a scholarship, which usually involves a competitive application process², or any of the other financial support available at the University of York (e.g. emergency loans or the student support fund)³.

The University of York offers five bursaries⁴:

- York Bursary
- Foundation Year Bursary
- Care Leavers Bursary (including Foyer Federation Bursary and Estranged Student Bursary)
- Refugee Bursary
- HYMS Bursary (in association with the University of Hull for students attending [Hull York Medical School](#) (HYMS))

Bursaries were introduced in the 2006/07 academic year when tuition fees increased from approximately £1,000 to £3,000 (Harrison et al., 2018; Harrison & McCaig, 2017). Under the [Higher Education Act 2004](#), universities that intended to charge higher tuition fees had a statutory requirement to provide bursaries of at least 10% of their tuition fees to students from low-income families (defined as households with an income of £17,500 or lower) (Murphy & Wyness, 2016). There were concerns that increasing tuition fees would discourage students from low-income families from accessing higher education and bursaries were introduced to mitigate this risk (Harrison et al., 2018; Nursaw Associates, 2015).

Tuition fees increased again in the 2012/13 academic year from approximately £3,000 to £9,000 and concerns about students from low-income families accessing higher education continued to be raised (McGuigan et al., 2014). Although it is no longer a statutory requirement, no university has stopped providing bursaries to students from low-income families to date (Harrison et al., 2018).

There has been a debate in recent years about the role that bursaries play - whether this is to enable access to higher education for students from low-income families, or to aid their continuation once enrolled (Harrison and McCaig, 2017; McCaig et al., 2016).

The objective is...	To evaluate the impact of receiving a bursary on our students
We will consider...	<ul style="list-style-type: none">• All stages of the student lifecycle• The amount of bursary• The format of bursary• The thresholds of household income eligibility
The aim is...	To ensure that the University of York's bursaries are as effective as possible

It is important to note factors that have contributed to the focus of this report. We have:

- Focused primarily on research from approximately 2012 onwards as this was when higher tuition fees of £9,000 were introduced. Transforming Access and Student Outcomes in Higher Education ([TASO](#)) notes that research from the 2000s might not be relevant anymore, given that the system of student finance has considerably evolved over the last 20 years⁵. However, there are some exceptions where the research is of importance or the only one available.
- Focused on research from the UK and/or England as this will enable generalisation to the University of York. We have considered TASO's [Evidence Toolkits](#) on the impact of financial support [post-entry](#) and [pre-entry](#), but found that although these focused on the most robust Type 3 evaluation⁶, they used primarily non-UK studies.
- Considered the [Office for Students'](#) (OfS) [Financial Support Evaluation Toolkit](#). We have been limited in our ability to implement the suggested evaluation, as discussed in [Limitations and Confounding Variables](#), but have reported the results of our survey and discussed these throughout this report.

The focus of this report is on the [York Bursary](#) and the [Foundation Year Bursary](#). These are the most widely provided bursaries at the University of York and are likely to have the biggest impact on the most students as a result of the outcome of this impact evaluation.

¹ [University of York Bursaries - Student home](#)

² [Scholarships - Student home, University of York](#)

³ [Hardship funding - Student home, University of York](#)

⁴ Please note, bursaries are only available to undergraduate home students.

⁵ [Financial support \(post-entry\) - TASO](#) - What we don't know

⁶ [Standards of evidence and evaluation self-assessment tool - Office for Students](#)

The [Care Leavers Bursary](#) and [Refugee Bursary](#) are not included in this report because they are aimed at specific groups of students with unique access and participation characteristics. Therefore, it is not possible to compare or combine their experiences with the rest of the student population. In addition, we discuss how there are differences in how financial support impacts access for specific groups when compared with the general student population in the [Access](#) section.

Meanwhile, whilst the [HYMS Bursary](#) has similar eligibility criteria to the York Bursary and the Foundation Year Bursary, the amount provided and the thresholds of household income mean that they are not directly comparable. In addition, any changes made to the HYMS Bursary must be agreed upon by both the University of York and the University of Hull. The results of this report are being made available to HYMS and the Access and Participation Monitoring and Evaluation Team will continue to discuss this with them further.

Notices

Ethics approval for this project was received from the University of York [Economics, Law, Management, Politics and Sociology \(ELMPS\) Ethics Committee](#) in November 2021. All participants of the survey were required to read an information sheet and complete a consent form before completing the survey. Participants of the survey were told that completing the survey was optional and they had the right to withdraw at any stage of the project. Participants of the survey were made aware that taking part in the project would not impact their receipt of financial support from the University of York.

Survey results which are relevant to the discussion in this impact evaluation have been copied in at the relevant points. The results of the survey have been suppressed (*) where the number of respondents was fewer than 10. True 0s (where 0 participants responded) have been reported where present. Data has not been suppressed using [HESA rounding and suppression](#) because it does not contain personal demographic information. All survey results can be found on the University of York's [Access and Participation Monitoring and Evaluation Team's website](#) as a PDF.

Under point 12 of 'How do we use your data?' in the [Privacy Notice for University of York Students](#), the Access and Participation Monitoring and Evaluation Team is eligible to use student data to conduct evaluations that support learning, teaching, assessment and the broader student experience. Where we report on student data we adhere to [HESA rounding and suppression](#) to ensure confidentiality.

INFORMATION ON BURSARIES

[Table 1](#) shows the current York Bursary. It was implemented in 2018/19.

Table 1: York Bursary from 2018/19 onwards

Year of Study	Residual Household Income	Bursary Amount and Format
Year 1	£0 - £35,000	£2,000 accommodation discount*
Year 2 +	£0 - £25,000	£1,100 cash payment
	£25,001 - £35,000	£1,000 cash payment

*Bursary is received as an accommodation discount if the student is in university accommodation. If the student is not in university accommodation, the bursary is received as a cash payment.

The York Bursary has changed six times in 10 years. The changes in thresholds, amounts and format can be seen in [Appendix A](#).

[Table 2](#) shows the current Foundation Year Bursary. It was implemented in 2015/16.

Table 2: Foundation Year Bursary from 2015/16 onwards

Year of Study	Residual Household Income	Bursary Amount and Format
Year 0	£0 - £25,000	£5,600 tuition fee waiver
	Other	£3,000 tuition fee waiver

The Foundation Year Bursary has changed two times in 10 years. The changes in amount can be seen in [Appendix B](#).

The University of York currently offers three Foundation Year courses:

- BEng Electronic Engineering (with a foundation year)
- BEng Music Technology Systems (with a foundation year)
- BSc Physics (with a foundation year)

The eligibility criteria for both bursaries is as follows⁷, students must:

- Be a resident in the UK (referring to the four nations of the UK - see the final eligibility criteria), be eligible for home tuition fees, and be eligible for and receiving funding from a UK Student Loans Company (SLC) provider
- Be studying an undergraduate level course (including integrated Masters programmes)
- Be studying full-time
- Be liable for the full tuition fees for the year
- Not be studying on a placement year, a year in industry, or a year abroad for the current academic year (this is due to these students not being liable for the full tuition fees)
- Not be in receipt of an NHS Social Work Bursary (Year 3 and Year 4 only)⁸
- Not be in receipt of an NHS Nursing Bursary (only available prior to 2016/17)⁹
- Not be from the Isle of Man and the Channel Islands

1. Please note, a student will remain on the same bursary scheme that was in place in their first year of study (Year 1) - i.e. if a student started their programme in 2016/17, they would remain on the bursary scheme that was in place in 2016/17, despite changes made in 2017/18 and 2018/19.

2. Please note, if a student repeats a year resulting in them starting Year 1 again, the student will receive the Year 1 bursary for both years - i.e. if a student started in 2020/21 and then repeats Year 1 in their second year (2021/22), they will receive the Year 1 rate for both 2020/21 and 2021/22.

The first note still applies to the second note - i.e. a student will remain on the bursary scheme in place in their original Year 1, rather than move between bursary schemes if their repeated Year 1 overlapped a change in the bursary scheme.

LIMITATIONS AND CONFOUNDING VARIABLES

It is important to consider the limitations of this evaluation and the possible confounding variables before assessing the impact of bursaries. We note here discussion points from the research literature, as well as points we have identified whilst working on the project. This is not meant to be an exhaustive list.

Confounding Variables

Firstly, the York Bursary has changed six times in 10 years. The amount of money and the thresholds of household income eligibility criteria have changed. As students remain on the same bursary scheme that they entered on, this means that within a single academic year multiple bursary schemes may be awarded. For example, the York Bursary changed in 2012/13, in 2013/14 and in 2014/15. As the average degree length is three years, in the 2014/15 academic year, there were three different bursary schemes being awarded. This means that identifying the impact of a specific bursary scheme is very difficult because there is so much overlap between them. The only possibility for evaluation is to look at the impact of awarding a bursary in general. Due to the many changes, we cannot say which scheme had the most impact based on amount or thresholds. Additionally, it is not possible to identify whether changes to the impact of receiving a bursary were due to the changes being made to the bursary schemes or to an alternative outside variable.

In 2023, the University of York bursaries have been the most consistent since the latest change to the York Bursary in 2018/19 - approximately five years have passed without a change in bursaries. This consistent five-year period would have allowed for a more accurate evaluation of the impact of our bursaries. However, the coronavirus pandemic occurred during this period, presenting new evaluation challenges due to the range of confounding variables that had not previously needed to be considered. This does not allow for a robust impact evaluation and is the main reason we have had difficulty implementing the OfS [Financial Support Evaluation Toolkit](#).

Further to this, alternative forms of financial support were available to students from outside of the University of York which may also have impacted results. The two most universally available were the National Scholarship Programme (NSP) and maintenance grants:

⁷ [University of York Bursaries - Student home](#) - See Guide for current students and Guides for students who started prior to 2022/23

⁸ This bursary is not automatically allocated but is based on academic achievement in Year 1 and Year 2. Students who do not receive the NHS Social Work Bursary in Year 3 and Year 4 remain eligible for the University of York bursaries.

⁹ Students in receipt of the NHS Learning Support Fund (available from 2020/21 onwards) are eligible.

- The NSP was available from 2012/13 to 2014/15 and offered £1,000 cash to students from household incomes of £25,000 or less (Bowes et al., 2014; McCaig, 2016).
- Maintenance grants were provided alongside maintenance loans for students with a household income of £25,000 or less. These were abolished from the 2016/17 academic year onwards and replaced with higher maintenance loans¹⁰.

Both the availability of maintenance grants and their abolition in 2016/17 can be considered as confounding variables for this report. Higher maintenance loan costs could be seen as a barrier to access to higher education for students from low-income families, similar to higher tuition fees.

Other confounding variables to consider are the various interventions that students who receive a bursary are targeted for. For example, being a bursary recipient might be considered as target criteria for other access and participation interventions. Harrison and McCaig (2017) note that students from low-income families are more likely to be targeted by a university for their outreach programmes. In addition to other interventions, there is also consideration of the other support provided to these students, such as resources and/or networks (e.g. the [working class and social mobility network](#) at the University of York). Therefore, it is not possible to say whether the impact on bursary recipients is a result of financial support exclusively or other contributing factors.

Kaye (2021) states that it is far from a straightforward relationship between the receipt of financial support and the impact on an individual's circumstances during their studies. They suggest that this explains why financial support impact evaluations are inconsistent, with some finding impact whilst others do not. This is also an important point to note, as evidence of impact (or lack of evidence of impact) cannot always be attributed to the financial support provided only.

Limitations of Measuring Impact

As well as consideration of the confounding variables which might influence an impact evaluation, there has also been criticism of applying 'What Works' methodology to bursaries. "What Works" methodology is summarised by the use of Type 3 evaluation¹¹, using control groups and experimental design to explicitly identify whether an intervention has worked or not.

The ability to apply this methodology to financial support (including bursaries) has been strongly criticised by Harrison and McCaig (2017), who were original developers of the OfS [Financial Support Evaluation Toolkit](#). They state several factors which make it impossible to isolate the impact of bursaries, such as a lack of a control group and the ethics of manipulation. We note and discuss many of Harrison and McCaig's (2017) points throughout this report.

This point might be best summarised by Harrison and McCaig (2017) who found that students and practitioners often state the effectiveness of bursaries (Callender and Wilkinson, 2013; Nursaw Associates, 2015; Bowes et al., 2014), whilst sector-wider quantitative research from policy makers found no formal impact of financial support on continuation or awarding (Office for Fair Access, 2014).

Another limitation of measuring the impact of financial support is a problem that has been identified throughout the literature regarding individual institutions' research versus research which combines the sector. A major study by the Office for Fair Access (2014) combined research from the sector to investigate the impact of financial support, and found no impact on continuation from first to second year. However, numerous studies conducted by individual institutions have identified impact (such as Harrison et al. (2018) at the University of Bristol and the University of West of England; see more in [Continuation](#)). There is therefore a disconnect between sector findings and that of individual institutions. This may be due to the large variation in the financial support available to students (Harrison and McCaig, 2017).

This point is particularly important to consider since we are taking research from other institutions and generalising to the University of York. Whilst we have taken the effort to only include UK and/or English universities, which make them more comparable, there are still differences between institutions which may impact bursaries in ways that are not accounted for. Herbaut and Geven (2020) note the importance of context. However, this is not a reason to exclude or ignore the information provided by the research, as it may still be applicable and enable our bursaries to be further developed to support our students.

A final limitation we are going to discuss is the use of formal versus informal measures of success. The OfS [Financial Support Evaluation Toolkit](#) encourages universities to use formal measures of success such as the Higher Education Statistics Agency (HESA) definition of continuation from first to second year and awarding of a 'good degree'¹². Subsequently, much of the research focuses on these. However, this lacks nuance and does not utilise all the information potentially available to evaluate (Harrison and McCaig, 2017). A focus on formal

¹⁰ [Abolition of maintenance grants in England from 2016/17 - House of Commons Library](#)

¹¹ [Standards of evidence and evaluation self-assessment tool - Office for Students](#)

¹² A 'good degree' is defined as a first or upper second class (2.1) degree classification.

measures often results in equally important informal measures, such as levels of stress and anxiety, being overlooked. We consider both measures where possible and relevant throughout this report.

As stated, this is not an exhaustive list of all limitations and confounding variables which may influence this impact evaluation. However, this indicates the complexity of this project and establishes why a Type 3 evaluation¹³ has not been possible. It is not possible to claim that bursaries exclusively have had an impact, but only whether receiving a bursary (and potentially how much) has had more or less of an impact.

ACCESS

Assumptions underlying Bursaries

We first investigate the underlying assumption behind the introduction of bursaries under the [Higher Education Act 2004](#) - that a rise in tuition fees would discourage students from low-income households from attending university.

Wakeling and Jefferies (2013) researched the impact of the change in tuition fees in the 2012/13 academic year. They found university enrolment rates increased. This suggests the increase in tuition fees did not deter students from attending university and Wakeling and Jefferies found "little evidence to support the assumption that students' decisions to attend higher education was dictated by economic 'rationality'" (p.491). In addition, Riddell and Weedon (2018) considered the assumption from a different perspective and noted that although Scotland has no tuition fees, the higher education system there is not more socially inclusive. When looking at the impact of the tuition fee increase on students underrepresented in higher education specifically, the Department for Education (2018) and Moore et al. (2013) found no evidence that the change to tuition fees had resulted in a decrease in access to higher education. Therefore the assumption of increased tuition fees negatively impacting access to higher education is not supported by the evidence.

Another underlying assumption, developed from the original assumption, is that students regard the debt associated with higher education as negative - this is why an increase in tuition fees (and subsequent debt) would result in fewer students accessing higher education (Kaye, 2021).

Evans and Donnelly (2018) found there was little evidence to suggest working-class students were "put off" university by the prospect of debt and that they display a "sense of ambivalence" towards this debt (p.1278). It has been suggested that this is because students do not view this debt as an immediate issue, choosing to dismiss the debt as a future concern (Clark et al., 2019). This is supported further by Pollard et al. (2019) who also found evidence of the immediate vs distant concerns around student debt, but also noted how students refer to this debt as being "not 'real' or 'bad' debt" (p.7). Again this assumption is not supported by the evidence.

Whilst there is little evidence supporting the underlying assumptions regarding the introduction of bursaries, it has been noted by Pollard et al. (2019) that the rise in tuition fees might have had impact in other ways. For example, they noted an increase in localisation of students, with a desire to live at home or reduce travel costs. This was also found by Wakeling and Jefferies (2013). Pollard et al. (2019) also found that there was increased importance placed on an institution's reputation and quality in order to maximise return on investment.

"...it gives students (like me) that are anxious about money a chance to study away from home, to a University they want to attend instead of having to stay close to home because of finances."

'Elite' Institutions

Considering the finding that there was an increased importance placed on an institution's reputation and quality with the increase in tuition fees (Pollard et al., 2019), it is interesting to note an 'unfortunate' phenomenon that has occurred since the introduction of bursaries.

Universities that successfully attract large numbers of underrepresented students then struggle to offer large amounts of financial support for these students. Meanwhile, 'elite' universities have fewer eligible students and are able to offer higher value bursaries. This is a well documented phenomenon cited by numerous studies (Harrison and Hatt, 2012; Kaye, 2021; Clark and Hordósy, 2019; Harrison and McCaig, 2017). Kaye (2021) asserts that the sector is enabling and supporting the pre-existing patterns of participation already in place, rather than bursaries enabling widening access to 'elite' institutions.

Given its membership in the [Russell Group](#), these considerations are important for the University of York within the context of Access.

Impact on Access

As the assumptions underlying the introduction of bursaries have little evidence to support them, it is then necessary to investigate whether the aims of supporting access to students from low-income families have been met.

¹³ [Standards of evidence and evaluation self-assessment tool - Office for Students](#)

In the literature, the majority of cases found that financial support had no noticeable impact on students' access to higher education. The Nursaw Associates (2015) investigated the experiences of individual institutions - all but one found no noticeable impact of financial support on access. Pollard et al. (2019) noted additional financial support available at different higher education institutions had no influence on decisions about whether or where to go to university.

"It would not change being able to afford education but can help in making studying pleasant."

So why does the majority of evidence suggest financial support has no impact on access to higher education?

The overriding message is that financial support is too complicated. Callender and Wilkinson (2013) conducted a survey and found that new undergraduates were not well-informed about the financial support available, and therefore did not feel as though this affected their choice of university. Harrison et al. (2018) similarly found pre-application knowledge about bursaries was limited and largely confined to an awareness of their existence. Students noted the bursary 'market' was confusing in terms of amount and eligibility, such that they did not feel they could rely on bursaries when deciding on universities. Students in Harrison et al.'s (2018) study also noted that because they were aware that bursaries existed, they largely presumed that the amounts available to them were broadly comparable, particularly within the type of university they were applying to. We discuss and illustrate this point further in our review of [Other Institutions](#).

Another suggestion is that information regarding financial support is not well engaged with. McGuigan et al. (2016) conducted a randomised control trial and found that underrepresented students were less likely to engage with information on higher education finances, even when it is readily available to them. Pollard et al. (2019) also found that students from low-income families were less likely to be reached by information regarding financial support. Mbah et al. (2018) states that there are clearly issues with communication and information dissemination within the sector.

Our survey results investigated our own students' knowledge of the University of York's bursaries prior to arriving. [Table 3](#) shows survey results on knowledge of existence and [Table 4](#) shows survey results on knowledge of amounts.

Table 3: Prior to starting your course, did you know you would be eligible for a bursary from the University of York?

Yes	44%
No	43%
Unsure	13%

Table 4: Prior to starting your course, did you know how much bursary (amount in £) you would receive from the University of York?

(as a percentage of those who knew they were eligible)

Yes	61%
No	24%
Unsure	15%

Our students' knowledge of the bursaries available at the University of York is evenly split between those who knew they existed vs those who did not. Additionally, of those who knew the bursaries existed, only 61% knew how much they were eligible for. This suggests our students potentially align with the research regarding a lack of knowledge of bursaries, amounts and eligibility.

A series of quotes from our students also support this finding:

"...should have been made more aware to students (amount applicable etc and dates) as I was completely unaware that I was entitled to one..."

"I was completely surprised when I received my bursary in first year, and the relief it provided was immense..."

"It would have been nice to receive an email prior to starting university saying that I would be receiving the bursary."

"Information on whether I am getting a bursary, how much I am getting, and when I would receive the bursary could be communicated better."

"Not knowing when payments were going to be received was a stressful experience."

"I think there has to be more communication about bursary opportunities in the future."

"To prevent students from worrying about finances there should be more communication about what bursaries they are getting (if they are even getting one) before the start of term"

"When I saw that I was eligible for the bursary it took a lot of the initial stress away..."

"...however it was not clear that this was an automatic bursary I would receive and it would have lessened my anxieties if I knew beforehand that it was a possibility."

However, it is important to note that there is evidence from the Nursaw Associates (2015) that for "a sizable minority of students", financial support does impact their access to higher education and their choice of destination (p.4). One higher education institution from the Nursaw Associates (2015) review (noted in the first paragraph of this section) found that access to financial support was most influential to students from the lowest household incomes - 56% of students from households with an income of £15,000 or less said the financial support available did influence their decision to go to university.

"A big obstacle for me...was how I was going to fund life while studying...I was concerned that the financial burden would be too much and that I would be prevented from completing the course, however with access to the bursary it is a huge weight off my mind..."

In addition, there is evidence that the impact of financial support in accessing higher education, and deciding on an institution, is of more importance to specific groups. Harrison et al. (2018) found that where additional financial support was provided for a group with a specific characteristic (such as mature students), this was more likely to impact their access to higher education. It is for this reason that we have not included the Care Leavers Bursary and Refugee Bursary in this impact evaluation.

"I got accepted for two universities and this was a major point that encouraged me to come to York. It wasn't all the money but I have a dependant...so it definitely helped."

Often, where a student stated that financial support did have an impact on their decision to attend university, it was common for it to be a small contribution, with other factors being of more importance (Nursaw Associates, 2015; Harrison et al., 2018). The reputation and quality of the university are already both cited in the [Assumptions underlying Bursaries](#) section, as was the locality of the university compared to home, and these factors are again noted here, as well as the importance of the course (Harrison et al., 2018; Kaye, 2021; Bowes et al., 2014). Callender and Wilkinson (2013) and Pollard et al. (2019) found that students state the decision about whether and where to access higher education is an academic one, not a financial one. Harrison et al. (2018) also found that students mentioned the social 'fit' they felt at the university they attended having a larger influence than financial support. This final point feeds into the research around 'belonging' at university, which is discussed more in the [Continuation](#) section.

Overall, the evidence suggests that financial support does not impact access to higher education. There is limited evidence that it does in certain cases, for specific groups and in specific institutions, but the overriding majority of the evidence suggests other factors have a larger contributing role. The reasons why there might be a lack of impact on access have been discussed and will be referred back to in the [Recommendations](#) section.

CONTINUATION

It is important to provide some context before we investigate the impact of bursaries on continuation:

- The OfS' definition of continuation is limited to "the percentage of first year students who continue their studies after 12 months (full-time students) or 24 months (part-time students)"¹⁴. Subsequently, most of the research focuses on this definition.
- Students are most likely to withdraw from university in the first year of study (Bradley, 2017).
- Students from low-income families are more likely to withdraw, even when prior attainment is controlled for (Crawford, 2014).

Impact on Continuation

Following a sector review, the Office for Fair Access (OFFA) (2014) concluded that there was no measurable effect of financial support on first year retention, suggesting that financial support did not have an impact on continuation (the potential problems of collating the sector data is discussed in the [Limitations and Confounding Variables](#) section). However, as previously stated, students who are most likely to receive financial support (i.e. those from low-income families) are more likely to withdraw from university (Crawford, 2014). Therefore, there is an argument that the financial support assessed by OFFA actually had a levelling

¹⁴ [How to use the dashboard - Office for Students](#) - Select the student lifecycle stage

effect, and this is why no measurable effect could be found. Therefore, this suggests that bursaries are having the intended impact on continuation for the students receiving them.

“The bursary allows me to be on a more level playing field to students who receive support from external sources like their parents, which I do not.”

In fact, some studies show that students who receive a bursary may actually have increased retention from first to second year compared to those who do not receive a bursary (Chetwynd and Diggle, 2013 (as cited in Hoare and Lightfoot, 2015); Moores and Burgess, 2022). Therefore, in one respect or another, financial support appears to have an impact on continuation - whether to level the playing field or to provide an advantage.

A statistical analysis¹⁵ conducted by the University of York's [Strategic Insight and Analysis Team](#) produced a five-year model from 2012/13 to 2016/17 of the factors potentially influencing students withdrawing from study. The results for receiving a bursary (yes/no) can be seen in [Table 5](#).

Table 5: Binomial Models demonstrating the Odds Ratios with Significance Flag of Withdrawn vs Completed

	5 year (2012/13 - 2016/17)	1 year (2012/13)	1 year (2014/15)	1 year (2016/17)	Overall Observation
Received bursary - Yes vs No	0.78**	1.303	1.214	0.327**	Less likely to withdraw

** Greater significance where p value is <0.01

The five-year model showed a statistically significant lower rate of withdrawal in those who received a bursary compared to those who did not, at an odds ratio of 0.78. This suggests that those who received a bursary were 22% less likely to withdraw from study. Additionally, as part of our survey, we asked students how important their bursary was in their ability to financially continue at university. The majority (82%) responded that it was either important or very important. This analysis and our survey results therefore support the research findings suggested above.

“It really has helped me a lot over the years to continue my studies at University of York”

However, the nature of the evidence means it is not possible to state that bursaries alone impacted students' continuation. Bradley (2017) cites a Higher Education Careers Service Unit (HECSU) paper which concluded that the higher rates of withdrawal among students who would typically be eligible for bursaries (i.e. those from low-income families) was not specifically as a result of finances. In fact, when a student's level of academic ability was controlled for, eligibility for bursaries as a predictive factor for withdrawal disappeared.

There is minimal evidence that financial hardship is the main reason why a student in receipt of financial support withdraws from university - factors such as course and/or institution play a larger role in decision-making (Bowes et al., 2014). This is supported by Hoare and Lightfoot (2015), who found that there typically was not one primary reason given for withdrawing, but a combination of factors. Harrison et al. (2018) found no evidence of increased financial difficulties in students who received financial support. Therefore, the evidence suggests that financial difficulties do not contribute noticeably to bursary recipients withdrawing from university.

Additionally, there is criticism of focusing exclusively on the formal measure of continuation, which has been noted in the [Limitations and Confounding Variables](#) section. Harrison and McCaig (2017) argue that other factors such as a student's ability to “remain healthy, expand their intellectual horizons and ... enjoy a reasonable quality of life” may arguably be as, or more, important (p.304). I.e. If bursaries do not have a demonstrable impact on formal measures, this does not mean that they are ineffective, do not have an impact or should be removed. Decision-making around bursaries should take a more holistic approach and consider broader measures.

“The bursary really helped me out a lot last year, I think honestly I would have had to really reduce my eating (only have 1 meal a day) if I didn't get it because all of my money went to my accommodation.”

Intermediate Factors

It is worth noting that even within intermediate measures of continuation we are limited, as it is not possible to account for individual factors, such as motivation or resilience (Harrison and McCaig, 2017).

There is evidence that those who are eligible for bursaries (i.e. those from low-income families) are more likely to take on part-time work (Bradley, 2017; Ilie et al., 2019). However, there is also evidence to suggest that

¹⁵ Degree Outcomes Statistical Analysis for Undergraduate Students 2020, by Karen Payne with Paulo Schau Guerra and Chris Hoyle, for the [University Teaching Committee - meeting notes, page 3](#)

students in receipt of financial support may not need to undertake part-time work or as much part-time work (Harrison et al., 2018). All but one institution included in the Nursaw Associates (2015) report found that the majority of students reported receiving financial support meant that they either did not need to take up part-time work or were able to reduce the number of hours they worked.

Clark and Hordósy (2019) suggested the reduced need to undertake part-time work meant that students had more time to spend on extracurricular activities. Furthermore, Bowes et al. (2014) suggested this would enhance student experience and would subsequently lead to enhanced student engagement and improved retention.

Within our survey, 57% of students who receive a bursary responded that they undertook paid work. Of those, 68% responded that it was either important or very important in helping them continue at University.

Another factor used to measure the impact of financial support on continuation is improved wellbeing. Students often note that receiving financial support alleviates feelings of anxiety and stress more generally, and also specifically with regards to finances (Harrison et al., 2018; Cotton et al., 2017). Bradley (2017) found that “money per se was not a reason for leaving university, but it can compound a situation of stress and dissatisfaction” (p.39).

[Table 6](#) shows our survey results related to bursary recipients’ feelings of wellbeing.

Table 6: Please tell us how much you agree with the following statements: Receiving a bursary helps me to...

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree
Be able to concentrate on my studies without worrying about finances	45%	43%	8%	*	*
Feel less anxious than I would have felt otherwise	56%	34%	7%	*	*

88% agreed or strongly agreed that receiving a bursary from the University of York meant that they were able to ‘concentrate on their studies without worrying about finances’, while 90% agreed or strongly agreed that it meant they were able to ‘feel less anxious than I would have felt otherwise’.

Quotes collected from students also indicate the importance of the bursaries on their feelings of stress and anxiety:

“The bursary absolutely saved my university experience - without it I would have been extremely stressed and anxious”

“I feel that the bursary helped me to feel more comfortable and relaxed within my studies as I didn’t have to worry about not being financially stable.”

“The bursary has taken that stress off and allowed me to fully commit myself to my studies without having to stress about money and finances.”

“...making my experience less worrying, stressful and allowing me to feel part of being a student...”

“It is very much money that helps with quality of life things that lead to less stress in the overall year.”

“...gave me peace of mind to allow me to study without as much financial stress/pressure...”

A less well-researched influencing factor on continuation is whether students are living in university accommodation or not. Harrison et al. (2018) found the bursaries offered to students strongly influenced their decision to choose university accommodation. They note that this impacts students’ lived experiences and involvement in the university community, which subsequently affects wellbeing.

Harrison et al. (2018) proposed a model of student spending decisions and their effects, which incorporate the three intermediate factors of student continuation we have discussed in this section (see [Figure 1](#)). We can see how bursaries impact each of these and influence how a student may make decisions based on their own priorities.

Figure 1: Harrison et al.'s (2018) Proposed model of student spending decisions and their effects

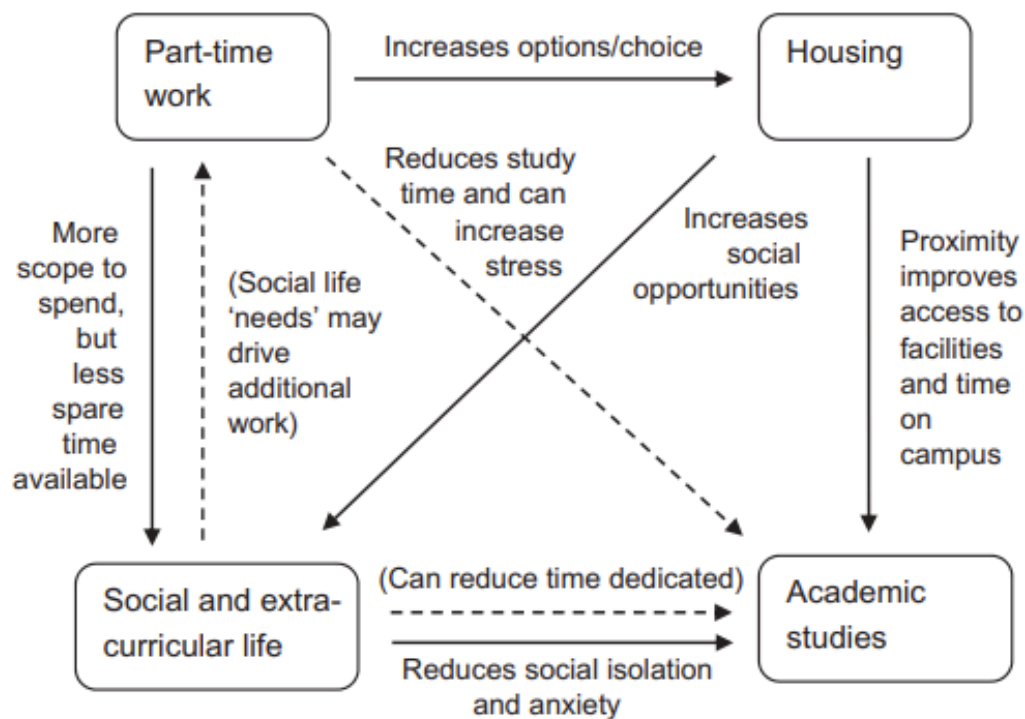


Figure from "Access, participation and capabilities: theorising the contribution of university bursaries to students' well-being, flourishing and success" by Harrison, N., Davis, S., Harris, R., & Waller, R. (2018), Cambridge Journal of Education, 48(6), p.689 (<https://doi.org/10.1080/0305764x.2017.1401586>)

Belonging

All the intermediate factors of continuation discussed above, and those proposed in Harrison et al.'s model (see [Figure 1](#)), contribute to a student's sense of belonging, which is heavily researched in relation to bursaries and student continuation.

The research regarding sense of belonging discusses how well a student feels they have integrated into their university and university lifestyle. This comes from the concept of 'academic and social integration' proposed by Tinto (1975, 2007). Sense of belonging has been found to positively impact a student's educational outcomes, experiences and persistence (Gopalan and Brady, 2020; Osterman, 2000; St-Amand et al., 2017; Thomas, 2012). Clark and Hordósy (2019) discuss how the likelihood of a student continuing in higher education is related to the extent to which they feel they belong within their institution.

Numerous studies link financial support provided by an institution and a student's sense of belonging within that institution (Nursaw Associates, 2015; Harrison et al., 2018; Mountford-Zimdars et al., 2015; O'Brien, 2015; Mbah et al., 2018). Clark and Hordósy (2019) found that students who received financial support were able to integrate with other students in ways that would not have been possible without financial support (such as sports and societies). This integration helped to enhance students' identification with the university. Pollard et al. (2019) suggest that financial support enables students to feel invested in by their university, which leads to greater confidence and effort from the student. In turn, this leads to a more positive view of their institution and subsequently an increased sense of belonging.

Quotes from our students support this:

"...meant I can participate alongside my peers."

"The bursary has been incredibly useful in relieving stress and making me feel like a greater part of the university community :)"

"It helps to relieve the anxieties about money and get more involved in university life."

"Thank you for allowing me to participate in uni as much as any other student! :)"

"The bursary made living costs a lot easier and having extra spending money for events etc., especially when surrounded by those from wealthier backgrounds who don't necessarily understand struggling to afford such things"

"...brought me in line with housemates and course mates to allow me to join in where I otherwise may not have been able."

[Table 7](#) shows survey results which also suggest greater feelings of belonging as a result of receiving a bursary from the University of York.

Table 7: Please tell us how much you agree with the following statements: Receiving a bursary helps me to...

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree
Afford to participate along with my fellow students	42%	46%	7%	4%	*
Feel part of the university community	25%	33%	34%	7%	*
Be able to participate in social and study trips	31%	39%	24%	4%	*
Feel more satisfied with my life as a student	45%	43%	9%	*	*

88% agreed or strongly agreed that receiving a bursary from the University of York meant they could ‘afford to participate along with their fellow students’, while 88% also agreed or strongly agreed that it meant they felt ‘more satisfied with their life as a student’. It is important to note however that only 58% agreed or strongly agreed that receiving a bursary from the University of York meant that they ‘feel part of the university community’, and actually 34% neither agreed or disagreed.

Not Just Money

An important question is raised within the literature on continuation: why do some recipients of financial support succeed whilst others do not (Cotton et al., 2017)?

Harrison et al. (2018) found in their study that there were students classified as ‘copers’ and ‘strugglers’, despite receiving identical financial support, and anecdotal evidence suggested that one was not worse off financially than the other. Therefore, it is likely that other factors contribute to the success of students beyond the financial support provided to them.

There is a suggestion that those typically eligible for financial support (i.e. those from low-income families) are more likely to be at risk of financial difficulties due to factors beyond the control of their institution (e.g. complex financial circumstances prior to higher education or other demands beyond the individual) (Harrison et al., 2018; Cotton et al., 2017). Therefore, although the aim of bursaries is to financially support students throughout their time at university, it is necessary to acknowledge that some financial circumstances are beyond the scope of what the university is able to support.

“Helped eliminate the financial struggles from myself and my mum”

“It also made it so I could help my family when needed”

Many studies also recognise the importance of an integrated package of support, rather than financial support in isolation (Byrne and Cushing, 2015). There is research on the role of pastoral support and mentoring alongside financial support to enable students to continue in higher education (Farenga, 2015). Mbah et al. (2018) comments that financial support is “not the silver bullet needed” (p.142).

AWARDING

Only one study was found which directly measured the impact of financial support on being awarded a 'good degree'¹⁶. Murphy and Wyness (2016) found that receipt of financial support is associated with a significantly higher likelihood of attaining a 'good degree' by 3.7 percentage points.

There is, however, more evidence regarding intermediate factors which are impacted by financial support and which in turn impact 'good degree' awarding rates.

Part-time work is discussed extensively in the literature. The logic chain is that students receiving financial support do not need to undertake part-time work or take on as much part-time work. This subsequently leaves more time for study, which ultimately leads to being awarded a better degree than had they not received the financial support (Hordósy et al., 2018). The impact of part-time work on degree awarding is well documented (Crockford et al., 2015; Harrison et al., 2018; Bowes et al., 2014).

Callender (2008) quantified the impact of students' part-time work on their degree results, while controlling for their academic attainment prior to higher education. They found that term-time work had a detrimental effect on degree results, with the more hours worked, the greater the negative effect. Consequently, students working the average number of hours per week (15 hours) were a third less likely to get a 'good degree' than non-working students. UCAS state that most universities recommend less than 15 hours work per week¹⁷. The University of York recommends up to 20 hours per week¹⁸.

Quotes from our students support this argument:

"Without this bursary, I would have had to work a lot more than I already do and this would have massively impacted my performance in tests."

"...it gave me the freedom to prioritise my studies over the job I acquired over summer, to the point where I now feel comfortable leaving my job with the increased workload of term 2."

"It put less pressure on me to have to work and means if I have lots of university work I can reduce paid work hours and not feel like I'm not going to be able to feed myself properly. It is so important to students."

Another area that financial support impacts in relation to being awarded a 'good degree' is wellbeing. Harrison et al. (2018) reported that students pointed to their bursary as a way to reduce their stress and anxiety, which subsequently freed up "cognitive 'space'" or prevented more serious mental health issues, thus allowing them to focus on their studies (p.687).

"Without it I am not sure I would have been physically or mentally as present on my course."

Therefore, although it is not possible to say with confidence that bursaries do impact a student's awarding of a 'good degree' due to a lack of research, the intermediate factors that it affects can have an impact on the final degree outcome.

PROGRESSION

Progression beyond higher education is not a stage of the student lifecycle that has been directly researched when evaluating the impact of financial support. However, throughout the review of the literature passing comments were made about the relationship between financial support and progression.

Multiple studies note that whilst receiving a bursary meant that students did not have to undertake as much part-time work, it did allow them to be more selective with the work they undertook, which subsequently contributed positively to their CV (Harrison et al., 2018; Clark and Hordósy, 2019). In addition, Harrison et al. (2018) found that receipt of financial support enabled students to pursue unpaid work experience and internships, which otherwise would not have been financially possible. They note that this was particularly relevant to subjects where work experience was needed for future career opportunities.

In the Nursaw Associates (2015) report, two institutions investigated the impact of financial support on students' decision to progress to postgraduate study. One of the institutions found that those who received financial support were more likely to say they wanted to complete a postgraduate course. Meanwhile, the other institution found that their students felt that the amount of debt acquired from postgraduate study would be an important factor in their decision to progress. The main barrier in both institutions reported by students with regards to progression to postgraduate study was funding.

¹⁶ A 'good degree' is defined as a first or upper second class (2.1) degree classification.

¹⁷ [Balancing Study And A Student Part Time Job | UCAS](#)

¹⁸ [Working while you study - Student home, University of York](#)

Our own students noted the lack of financial support beyond their undergraduate degree:

"...I am in the same financial situation as I was for my Undergraduate degree. The postgraduate loan cannot even cover the tuition fees and rent, so some financial support from the University for postgraduates would be beneficial."

"I'm considering a masters at York but with a lack of postgrad bursary I am not sure it is possible for me."

"I receive no government bursary as I study History PGCE...I struggle to afford to live as I cannot work alongside my course. It does not seem fair that I cannot receive the York Bursary."

THE AMOUNT AND THE THRESHOLDS

There is a lack of research on the impact of the amount of financial support received as well as the household income eligibility thresholds. The lack of existing research could be for a number of reasons, for example the ethical implications of providing different amounts of money to students in similar situations (such as household incomes) (see [Limitations and Confounding Variables](#) for more information).

One well-cited paper investigated the impact of the amount of financial support. Murphy and Wyness (2016) used financial support data provided by nine English universities and investigated the impact of the different amounts of financial support provided in the first year of study. The primary findings were:

- Bursaries worth £1,900 per year provided the most impact. The impact of bursaries decreases beyond this amount.
- The average amount of financial support received was £750 per year.
- Low-income and high-ability students are the most positively impacted by financial support.

This therefore suggests that there is an optimal amount of financial support. This is similar to the amount provided by the University of York in the first year of study (£2,000). However, the York Bursary currently moves from £2,000 provided in the first year of study to approximately half (£1,100 or £1,000 depending on household income) in subsequent years.

"...stay at £2,000 that would be life-changing to so many people like me with little to no financial support"

Murphy and Wyness (2016) also noted:

- There is no correlation between parental income and the amount of financial support received.
- There is a misallocation of aid - Universities typically do not provide students with the lowest incomes sufficient aid and instead provide higher than optimal aid to middle-income students.

The University of York is the only university in our review of [Other Institutions](#) which provides near equal amounts across its different household income thresholds. Therefore, there is a risk that the University of York falls into the second bullet point above regarding the misallocation of aid.

It is important to note that whilst Murphy and Wyness (2016) is a well-cited paper across the literature, there might be limitations to the interpretation of their results. Importantly, their data is pre-2012 with the main sample of students entering between 2006/07 and 2009/10. However, there has not been a more recent replication of this study.

Additionally, there is a lack of research regarding household income thresholds used in eligibility criteria. Only one study was found to investigate this. Moores and Burgess (2022) found that students who received financial support in the two lowest household income brackets (less than £18,000 and £18,001-£25,000) were five times less likely to withdraw from university than those who did not receive financial support. They also found this effect remained, though was less statistically significant, for students in the middle-income bracket (£25,001-£42,000). Therefore, this suggests that there are optimal household income thresholds to provide support to. Furthermore, this relates to Murphy and Wyness's (2016) point around the misallocation of aid, with Moores and Burgess (2022) demonstrating how this might be optimised.

The York Bursary currently has an upper household income threshold of £35,000 for providing aid. We discuss thresholds more in our review of [Other Institutions](#).

"This year my income exceeded the threshold by around £50 and that have affected my financial situation drastically"

When the research regarding bursary values and eligibility thresholds are combined, they provide an example of the optimal support that can be provided for a student. These are considered in the [Recommendations](#) section.

THE FORMAT

Mbah et al. (2018) note that the way in which financial support is provided can also have an impact on students. There are three main formats in which bursaries are administered: cash payments, tuition fee discounts (or fee waivers) and accommodation discounts. The University of York currently provides its bursaries as a combination of all three.

A survey by the National Union of Students (NUS) in 2012 (as cited in Byrne and Cushing, 2015) found that 66% of respondents indicated a preference for support to be provided in the form of a cash bursary; 13% for a fee waiver, 4% a discount on services and 17% for a combination of all three options. Meanwhile, the Student Income and Expenditure Survey (SIES) from 2014/15 (Maher et al., 2018) found that financial support was most commonly provided as a cash payment (83%), followed by discounted university accommodation (12%), prepaid cards for university goods and services (6%) and vouchers for textbooks (4%). The Nursaw Associates (2015) also found that the majority of institutions in their report provide cash payments as their favoured option. This is also observed in our review of [Other Institutions](#).

Our survey asked students to indicate their preferred bursary format (see [Table 8](#)).

Table 8: If you had the option, which of the following payment types would you have preferred for your bursary in the last academic year?

	1 (Most preferable)	2	3 (Least preferable)
Accommodation discount (University accommodation only)	22%	48%	30%
Cash payment	68%	22%	10%
Tuition fee discount	10%	30%	60%

The results of our survey indicate that cash payment is also the favoured option amongst our students at 68%.

"It is better this year when I am able to see the amount come into my account rather than straight into accommodation."

Pollard et al. (2019) suggest that cash bursaries have a greater impact on students' continuation, as this format alleviates students' concerns regarding meeting immediate living costs. Likewise, Clark and Hordósy (2019) suggest the autonomy to shape support around individual needs and interests can enhance a student's wider engagement with the university. This further supports Harrison et al.'s (2018) proposed model of student spending decisions and their effects on continuation (see [Figure 1](#)).

Our students also indicated that by receiving a cash payment they were better able to plan for their own individual situations and circumstances:

"...useful in terms of savings and potentially increased money to cover rental deposits etc"

"The bursary helped me to be able to pay rent in summer without having to go into debt or my overdraft"

Currently the York Bursary is given as an accommodation discount in the first year of study for those living in university accommodation. However, the University Accommodation Invoice does not reflect the bursary accommodation discount¹⁹. Therefore, students are required to know to apply the discount themselves and underpay the invoice. However, as indicated in the [Access](#) section, students are not necessarily aware that they are eligible for the bursary, and so do not necessarily take this into account when paying their accommodation invoice. This can result in students unintentionally overpaying their accommodation invoice.

Currently, instances of overpayment are based on anecdotal evidence, and the extent to which it occurs remains uncertain. The University typically is not able to reimburse accommodation payments until the end of the academic year (approximately July), resulting in low-income students being further financially disadvantaged. In this instance, there is a need to improve the existing processes in place to better support these students and mitigate any adverse effects .

"I was on a wild goose chase in August and September to get money paid off my accommodation back"

Again, this research and its impact on the University of York bursaries are considered in the [Recommendations](#) section.

¹⁹ [Guide to the University of York Bursary Schemes 2022/23](#) - Accommodation Payments

OTHER INSTITUTIONS

Please note, all information in this section was researched by the Access and Participation Monitoring and Evaluation Team by accessing individual institution's public websites in February 2023. If you find the information reported to be incorrect, please contact access-and-participation@york.ac.uk.

As part of this impact evaluation, we conducted a review of equivalent bursaries available in the higher education sector. We made use of two groups - the Comparison Universities and the Russell Group. The [Comparison Universities](#) are a group of eight universities that the Access and Participation Monitoring and Evaluation Team have identified as being similar to the University of York in terms of 'prestige', structure and local area. The [Russell Group](#) is a group of 24 'leading universities' with a focus on research and education.

The equivalent bursaries to the York Bursary and the Foundation Year Bursary that we have identified in the Comparison Universities and the Russell Group can be seen in [Appendix C](#) and [Appendix D](#) respectively.

The bursaries available at the Comparison Universities demonstrate a worked example of the discussion regarding 'Elite' Institutions in the [Access](#) section. Essentially, the Comparison Universities admit greater numbers of students who are typically eligible for bursaries (see percentage of IMD Quintile 1 students enrolled on the OfS' [Access and Participation Data Dashboard](#)) and we can see that these institutions have additional eligibility criteria for their bursaries. For example, the [University of Bath](#) and the [University of Kent](#) provide a list of additional eligibility criteria, most of which correspond with other APP target characteristics. The most commonly used additional criteria within the Comparison Universities is POLAR4. In comparison, only one of the Russell Group universities reviewed uses additional eligibility criteria for their bursaries beyond household income. The [Warwick Bursary](#) has additional eligibility criteria related to the type of school a student attended.

The Format

In [The Format](#) section, we identified cash payment as students' favoured format for receiving a bursary. In the review of other institutions, this is also observed as a preference. In the majority of cases, cash is the only option available to students, or is provided as the default option.

An accommodation discount is only provided as an option in two cases that we observed - the [University Bursary Scheme](#) at the University of East Anglia (UEA) and the [Leeds Bursary](#). In both cases, this is provided as an option out of the three format options discussed in [The Format](#) section and is not the default option. The University of York appears to be unique in offering an accommodation discount as the default and only option in the first year of study (unless a student is not in university accommodation).

Furthermore, although few universities offer an accommodation discount as part of their standard bursary, a number do offer additional financial support to students in their first year of study in university accommodation in addition to a bursary (for example, the [University of Bath](#)).

The option of a tuition fee waiver is more common than an accommodation discount, but is still noticeably less common than cash payments. It is only seen as the default option in one case - the [University Bursary Scheme](#) at UEA. A fee waiver is also offered by the [Leeds Bursary](#) and the [Loughborough University Bursary](#), but in slightly different circumstances. This is only provided to students on foundation year courses (similar to the University of York), but is offered as an alternative to a cash payment. In both cases, students are given the option of a cash bursary or a tuition fee discount at a higher amount than the cash bursary (different to the University of York).

Foundation Year Bursary

We have already noted only three other universities in our review of other institutions offer tuition fee discounts as a format. However, it is never the only option available to those students.

In addition, the Foundation Year Bursary tuition fee discount at the University of York is by far the highest bursary offered. [LSE](#) and the [University of Manchester](#) offer £4,000 to their lowest threshold students and [Imperial College London](#) offers £5,000. The University of York currently offers £5,600 to students with a household income of £25,000 or less.

Additionally, the Foundation Year Bursary lacks an upper household income threshold. Currently, anyone on a foundation year will receive this bursary. In no other institution have we seen eligibility criteria without an upper threshold on household income.

Finally, having a separate bursary for foundation year students is not common within our review of other institutions. We have only found three examples - the [University of Leeds](#), [Loughborough University](#) and the [University of Manchester](#). In all three cases, their foundation year and general bursaries are far more aligned than at the University of York.

The Amount and The Threshold

The York Bursary offers near equivalent amounts of financial support across its different eligibility criteria thresholds. The York Bursary has two thresholds for household income eligibility criteria: £25,000 or less and £25,001 to £35,000. The amount of bursary differs by only £100 in second and subsequent years for the two

household income thresholds. Nowhere else in our review of other institutions is this observed. Typically, if a university has given different eligibility criteria thresholds for their bursaries, there is a noticeable difference between the financial support provided to the different thresholds.

There are a couple of instances where universities do not provide different thresholds of eligibility criteria and instead have just one, usually set at £30,000 (for example, the [University of Nottingham](#) and the [University of Lancaster](#)).

We found one other institution which offers different amounts of financial support depending on the year of study, similar to the University of York - the [University of Kent](#). However, the University of Kent reduces its bursary amount across the years by a quarter, whereas the University of York reduces it by a half.

In terms of the amounts offered by the University of York, it is pretty consistent with other institutions. Many institutions offer bursaries in the range of £1,000-£2,000, with some offering more and some offering less, depending on eligibility criteria. We identified the [University of Manchester](#) and [Newcastle University](#) to have the most similar bursaries to the York Bursary in terms of amount awarded.

Looking at our review of other institutions, whilst there are differences between institutions in terms of amount, eligibility and format, they all follow a consistent pattern. Meanwhile, we have identified many differences and complexities within the University of York bursaries. Therefore, there is potential to align ourselves more closely with the other institutions we have reviewed, thus addressing some of the complexity issues for prospective students (see the [Access](#) section).

Finally, some institutions offer a higher household income upper threshold than the University of York (for example, £42,875 at [UCL](#)). £42,875 is the threshold for the student maintenance loan entitlement, from which assessed contributions change²⁰. This also fits with Moores and Burgess (2022) study which gave an upper limit of impact of £40,000 (see [The Amount and The Threshold](#) section).

RECOMMENDATIONS

These recommendations are based on the research and survey conducted by the Access and Participation Monitoring and Evaluation Team. We have considered all the information identified in this impact evaluation to suggest how The University of York's bursaries might best have an impact on its students.

²⁰ [Student finance: how you're assessed and paid 2022 to 2023 - GOV.UK](#)

Number	Recommendation	Suggested Priority	Impact	Suggested Implementation
1a	Adjust the amount offered by the York Bursary so that those in the lowest household income thresholds receive more than those in the higher threshold	High	<ul style="list-style-type: none"> Align with the sector Reduce complexity of bursaries, which will potentially impact access Address the issue of misallocation of aid to those in the middle-income threshold Impact on the intermediate factors (such as level of part-time work, wellbeing and sense of belonging) that impact continuation and awarding 	<p>Household income of £0 to £25,000 - eligible for £2,000</p> <p>Household income of £25,001 to £35,000 - eligible for £1,000</p>
1b	Adjust the amount offered by the York Bursary to be consistent across years of study within a household income threshold	High	<ul style="list-style-type: none"> Align with the sector Reduce complexity of bursaries, which will potentially impact access Impact on the intermediate factors (such as level of part-time work, wellbeing and sense of belonging) that impact continuation and awarding 	See Table 9
2	Offer the York Bursary as cash payment	High	<ul style="list-style-type: none"> Align with the sector Student preference for cash payments Impact on the intermediate factors (such as level of part-time work, wellbeing and sense of belonging) that impact continuation and awarding Address processing issues 	<p>Move to cash payments</p> <p>See Table 9</p>
3	Remove the Foundation Year Bursary and apply the York Bursary to foundation year students	High	<ul style="list-style-type: none"> Align with the sector Address issues of amount and lack of upper threshold See suggested impacts of above recommendations 	<p>Move to one universal York Bursary</p> <p>See Table 9</p>
4	Increase the upper household income threshold or add a third household income bracket	Medium	<ul style="list-style-type: none"> Align with proportion of the sector Impact more students who could be considered to be low-income and could be positively impacted by financial support 	<p>Either:</p> <p>Increase the upper threshold from £35,000 to £42,875 and continue to provide £1,000 or</p>

Number	Recommendation	Suggested Priority	Impact	Suggested Implementation
				Add an additional eligibility criteria threshold of £35,000 to £42,875 and provide £500 See Table 10
5	Introduction of a Masters Bursary	Low	<ul style="list-style-type: none"> Increased progression of undergraduate students to postgraduate study at the University of York 	TBC

Based on the above recommendations, see [Table 9](#) for our proposed York Bursary:

Table 9: Proposed York Bursary

Residual Household Income	Bursary Amount and Format
£0 - £25,000	£2,000 cash payment
£25,001 - £35,000	£1,000 cash payment

Based on Recommendation 4, see [Table 10](#) for the proposed options for changing the upper household income threshold:

Table 10: Proposed Options for Changing the Upper Household Income Threshold

Residual Household Income	Bursary Amount and Format
£25,000 - £42,875	£1,000 cash payment
OR	
£35,000 - £42,875	£500 cash payment

CONCLUSION

The York Bursary and Foundation Year Bursary are reasonable, especially as the University of York has the advantage of being able to provide more support to students from low-income households as an 'elite' institution. Our survey results suggest that students consider bursaries to be important to their continuation.

However, there is scope to make improvements that will positively impact our students. Primarily the University of York needs to be more in line with the sector. This will address the biggest challenge for students with regard to access - improving understanding of bursaries by decreasing the complexity surrounding them. Additionally, making changes to our bursary amounts and formats will positively impact students' continuation and awarding by impacting intermediate factors (such as levels of part-time work, wellbeing and sense of belonging).

As a result of this project, there is also scope to consider broader areas of work adjacent to financial support. We foresee this being an ongoing area of work for the Access and Participation Monitoring and Evaluation Team that we will continue to consider. This will include conducting our survey again in the future and carrying out statistical analysis once the impact of the coronavirus pandemic has primarily passed. We will continue to use this impact evaluation to support and inform our work.

OTHER WORK TO CONSIDER

In this section, we consider other areas of work which we identified through the research and impact evaluation of bursaries at the University of York (in addition to the [recommendations](#) made). They are listed here for future reference and to be taken forward by different teams across the University of York.

- Eligibility criteria and guidance - Noticeably, the eligibility of recipients of the NHS Learning Support Fund to also receive a bursary from the University of York.
- Information dissemination - Website - Reorganisation of the University of York's website used to advertise the bursaries and scholarships available, including definitions of what a bursary vs a scholarship is. Noticeably, ensuring all the scholarships available at the University of York are shown (e.g. the [Mature Student Scholarship](#))
- Information dissemination - Communication - Due to the process of receiving household income data and assessing bursary eligibility, it is not possible to tell students prior to arriving at the University of York if they will definitely receive a bursary or not. However, there is scope to improve communication of the potential of bursaries prior to arrival.
- Complexity - This should be resolved by the [recommendations](#) and the improved information dissemination. This will be included in future survey questions.
- Influence on access - We have survey results investigating the knowledge of bursaries prior to university but have not investigated the influence of bursaries on decision making. This will be included in future survey questions.
- OfS Financial Support Evaluation Toolkit - We aim to rerun our statistical analysis and survey again in the future.
- Sense of belonging - Work with the different areas across the University of York to improve our students' sense of belonging, which was identified in the survey questions to be the area where the University of York does not perform as well.
- Money management - Work with the Student Support Team and Library Services Team to ensure our money management advice is up-to-date, impactful and disseminated.
- Integrated package of support - Investigate the other areas of support offered to bursary recipients specifically and assess their impact, as well as other areas of development.
- Part-time work recommendation - Currently the University of York recommends up to 20 hours of part-time work per week. Meanwhile the research suggests that an average of 15 hours per week will already begin to have an impact on awarding.
- Postgraduate study - Investigate the impact of bursaries on the progression of bursary recipients to postgraduate study. This will be included in future survey questions.
- Specific groups - Complete a similar impact evaluation for the specific groups of care leavers and refugees, who each have their own bursary available at the University of York.
- HYMS - Liaise with HYMS to discuss the impact of their HYMS bursary.
- Replication of Murphy and Wyness (2016) - This is a key and well-cited paper that has a large impact on bursary research and the sector. However, the data is old and from pre-2012 and the tuition fee increase. There is scope to investigate a replication of this study, potentially by the University of York.

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APPENDICES

Appendix A - York Bursary from 2012/13 to 2017/18

2017/18:

Year of Study	Residual Household Income	Bursary Amount and Format
Year 1	£0 - £16,000	£2,000 accommodation discount*
	£16,001 - £25,000	£1,750 accommodation discount*
	£25,001 - £35,000	£1,500 accommodation discount*
Year 2 +	£0 - £16,000	£1,600 cash payment
	£16,001 - £25,000	£1,500 cash payment
	£25,001 - £35,000	£1,500 cash payment

2015/16 to 2016/17:

Year of Study	Residual Household Income	Bursary Amount and Format
Year 1	£0 - £25,000	£2,400 accommodation discount*
	£25,001 - £35,000	£1,000 accommodation discount*
Year 2 +	£0 - £25,000	£1,800 cash payment
	£25,001 - £35,000	£1,000 cash payment

2014/15:

Year of Study	Residual Household Income	Bursary Amount and Format
Year 1	£0 - £25,000	£3,000 accommodation discount*
	£25,001 - £30,000	£1,000 accommodation discount*
	£30,001 - £35,000	£500 accommodation payment*
Year 2 +	£0 - £25,000	£2,000 cash payment
	£25,001 - £35,000	£1,000 cash payment
	£30,001 - £35,000	£500 cash payment

2013/14:

Year of Study	Residual Household Income	Bursary Amount and Format
Year 1	£0 - £25,000	£2,000 tuition fee waiver £1,000 accommodation discount*
	£25,001 - £30,000	£1,000 accommodation discount*
Year 2 +	£0 - £25,000	£2,000 cash payment
	£25,001 - £35,000	£1,000 cash payment

2012/13:

Year of Study	Residual Household Income	Bursary Amount and Format
Year 1	£0 - £25,000	£2,000 tuition fee waiver £1,000 accommodation discount*
Year 2 +	£0 - £25,000	£2,000 cash payment

**Bursary is received as an accommodation discount if the student is in university accommodation. If the student is not in university accommodation, the bursary is received as a cash payment.*

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Appendix B - Foundation Year Bursary from 2012/13 to 2014/15

2012/13 to 2014/15:

Year of Study	Residual Household Income	Bursary Amount and Format
Year 0	£0 - £25,000	£8,500 tuition fee waiver
	Other	£7,500 tuition fee waiver

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Appendix C - Equivalent Bursaries at the Comparison Universities

HHI = household income

Comparison University	Equivalent to the York Bursary	Equivalent to the Foundation Year Bursary
University of Bath	<p>Bath Bursary - HHI less than £25,000 and one or more of the following:</p> <ul style="list-style-type: none"> • POLAR4 Quintile 1 or 2 • IMD Quintile 1 or 2 • Care Leaver • Estranged student • Carer • Refugee <p>Eligible for up to £3,000 cash</p> <p>Additional Accommodation Bursary</p>	
University of Exeter	<p>Access to Exeter Bursary -</p> <p>HHI less than £16,000 - eligible for £2,000 cash</p> <p>HHI £16,001 to £25,000 - eligible for £1,200 cash</p>	
University of Kent	<p>Kent Financial Support Package - HHI less than £30,000 and one or more the following:</p> <ul style="list-style-type: none"> • Under 21 and POLAR 4 Quintile 1 or 2 • Over 21 (mature student) • Under 21 and IDACI Quintile 1 • In receipt of Disabled Students' Allowance • Care Leaver/Individual student under 20/Estranged student/Foyer Federation (homeless) • Carer <p>Eligible for £1,500 cash in first year and £1,000 cash in subsequent years</p>	
Lancaster University	<p>Lancaster Bursary -</p> <p>HHI less than £30,000 - eligible for £1,000 cash</p>	
Loughborough University	<p>Loughborough University Bursary -</p> <p>HHI less than £25,000 and not from Wales - eligible for £1,200 cash</p>	<p>Loughborough University Bursary -</p> <p>HHI less than £25,000 and not from Wales - eligible for £1,200 cash or £2,000 fee waiver</p>
University of Surrey	<p>University of Surrey Bursary -</p> <p>HHI less than £20,000 and from POLAR4 Q1, Q2, or Q3 - eligible for £2,500 cash</p>	

Comparison University	Equivalent to the York Bursary	Equivalent to the Foundation Year Bursary
University of East Anglia (UEA)	University Bursary Scheme - HHI less than £16,000 - eligible for £1,300 HHI £16,001 to £20,000 and from POLAR4 Quintile 1 - eligible for £800 Fee waiver is given as default option, with accommodation discount and cash payments available as options.	

Please note, all information in this section was researched by the Access and Participation Monitoring and Evaluation Team by accessing individual institution's public websites in February 2023. If you find the information reported to be incorrect, please contact access-and-participation@york.ac.uk.

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Appendix D - Equivalent Bursaries at the Russell Group universities

HHI = household income

Russell Group university	Equivalent to the York Bursary	Equivalent to the Foundation Year Bursary
University of Birmingham	Chamberlain Award - One of more of the following: <ul style="list-style-type: none"> • HHI less than £25,000 • HHI less than £60,000 and completed a Pathways to Birmingham programme • HHI less than £60,000 and POLAR4 Quintile 1 Eligible for £2,000 cash Additional £1,000 accommodation discount for the third eligibility criteria if living in university accommodation in first year	
University of Bristol	University of Bristol Bursary - HHI less than £25,000 - eligible for £2,060 cash HHI £25,001 to £30,000 - eligible for £1,550 cash HHI £30,001 to £35,000 - eligible for £1,290 cash HHI £35,001 to £40,000 - eligible for £780 cash HHI £40,001 to £42,875 - eligible for £520 cash Additional Accommodation Bursary	
University of Cambridge	Cambridge Bursary Scheme - HHI up to £62,215 - eligible for up to £3,500 cash College specific schemes are also available	
Durham University	Durham Grant Scheme - HHI less than £30,000 - eligible for £2,500 cash HHI £30,001 to £47,200 - eligible for between £2,495 and £780 cash	
University of Exeter	Access to Exeter Bursary - HHI less than £16,000 - eligible for £2,000 cash HHI £16,001 to £25,000 - eligible for £1,200 cash	

Russell Group university	Equivalent to the York Bursary	Equivalent to the Foundation Year Bursary
Imperial College London	Imperial Bursary - HHI less than £16,000 - eligible for £5,000 cash HHI £16,001 to £50,000 - eligible for £4,000 cash HHI £50,001 to £55,000 - eligible for £3,000 cash HHI £55,001 to £60,000 - eligible for £2,000 cash	
King's College London		
University of Leeds	Leeds Bursary - HHI less than £25,000 and not from Wales - eligible for £2,000 HHI £25,001 to £30,000 and not from Wales - eligible for £1,500 HHI £30,001 to £36,000 - eligible for £1,000	Leeds Bursary - HHI less than £25,000 and not from Wales - eligible for £3,000 HHI £25,001 to £30,000 and not from Wales - eligible for £1,500 HHI £30,001 to £36,000 - eligible for £1,500 tuition fee waiver or £1,000 cash HHI £36,001 to £42,875 - eligible for £1,500 tuition fee waiver or £500 cash Cash payment is given as default option, with accommodation discount and tuition fee waiver as options.
University of Liverpool	Liverpool Bursary - HHI less than £25,000 - eligible for £2,000 cash HHI £25,001 to £35,000 - eligible for £750 cash Additional £1,000 accommodation discount for all of the above if living in university accommodation in first year	
LSE	LSE Bursary - HHI less than £18,000 - eligible for £4,000 cash HHI £18,001 to £25,000 - eligible for £3,500 cash HHI £25,001 to £30,000 - eligible for £2,250 cash HHI £30,001 to £35,000 - eligible for £1,500 cash HHI £35,001 to £42,875 - eligible for £500 cash Additional Accommodation Bursary	
University of Manchester	The Manchester Bursary - HHI less than £25,000 - eligible for £2,000 cash HHI £25,001 to £35,000 - eligible for £1,000 cash	Foundation Year bursaries - HHI less than £25,000 - eligible for £4,000 cash HHI £25,001 to £35,000 - eligible for £2,000 cash
Newcastle University	Opportunity Scholarship - HHI less than £25,000 - eligible for £2,000 cash HHI £25,001 to £35,000 - eligible for £1,000 cash	

Russell Group university	Equivalent to the York Bursary	Equivalent to the Foundation Year Bursary
University of Nottingham	University Core Bursary - HHI less than £35,000 - eligible for £1,000 cash	
University of Oxford		
Queen Mary, University of London	Queen Mary Bursary - HHI less than £20,000 - eligible for £1,700 cash HHI £20,001 to £35,000 - eligible for £1,000	
University of Sheffield	University of Sheffield Bursary Scheme - HHI less than £25,000 - eligible for £1,000 cash HHI £25,001 to £30,000 - eligible for £500 cash HHI £30,001 to £40,000 - eligible for £250 cash Additional £250 if live in one of the country's most deprived areas (unspecified, defined by the government)	
University of Southampton	Student Support Package - HHI less than £16,000 - eligible for £2,000 cash HHI £16,001 to £30,000 - eligible for £1,000 cash	
University College London	UCL Undergraduate Bursary - HHI less than £16,000 - eligible for £3,000 cash HHI £16,001 to £25,000 - eligible for £2,000 cash HHI £25,001 to £37,000 - eligible for £1,500 cash HHI £37,001 to £42,875 - eligible for £1,000 cash	
University of Warwick	Warwick Bursary - For your sixth form education to have been educated at a state school or college in England <u>or</u> received a full fee-paying means-tested bursary at an Independent School in England <u>or</u> a partial means-tested bursary which is clearly indicative of an annual family income below £25,001 per year and one of the following: <ul style="list-style-type: none"> • HHI less than £16,000 - eligible for £2,000 cash • HHI £16,001 to £25,000 - eligible for £1,500 cash • HHI £25,001 to £35,000 - eligible for £1,000 cash 	

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