

## Access and Participant Plan Financial Support Evaluation Executive Summary

### Introduction

#### 1. Introduction

The OfS regulates and monitors HEIs to ensure each meets the conditions of registration which includes having an agreed Access and Participant Plan (APP) in place and that this plan is annually evaluated. APPs are developed to set out “*how higher education providers will improve equality of opportunity for underrepresented groups to access, succeed in, and progress from higher education*” (OfS, 2021). At UON, the Institute for Social Innovation and Impact (ISII) conducts the evaluation for the APP in three ways. Firstly, through an evaluation of the impact of our widening access activities, secondly the impact of our investment in student success and progression, and finally the impact of UON’s financial support package in addressing the barriers to student success and progression. This summary of the ‘*Financial Support Evaluation*’ report focuses on the findings on the evaluation of the financial support data gathered by the university in 2021/22, through three data gathering tools supplied by the OfS. The statistical tool examined data provided by HESA for 2016/17 and 2019/20 (n= 4647), the survey tool collected responses through an online survey (n=110), and the interview tool invited students to take part in a semi-structured interview (n=10). This report and evaluation sits within the University’s wider five-year evaluation strategy.

The statistical tool provides a framework for the evaluation of the relationships that exist between financial support and four specific outcomes:

1. Retention into the second year (continuation)
2. Degree completion within five years
3. Degree attainment level or grade
4. Graduate outcome (5-year destination)

The statistical analysis is completed annually upon accessibility of data and reported in this financial evaluation. The survey and interview tools aim to at understanding the effectiveness of financial support packages from the student perspective and uses semi-structured interviews with a pre-designed interview question structure

The evaluation of UON’s financial support provision to students is ongoing, and this report builds on the previous reports, which highlighted the overall positive impact of UON’s financial support package on continuation, the impact of COVID-19 on students, and identified the need for more awareness amongst staff on the support available for students to enable improved signposting and earlier intervention.

For this year’s evaluation the financial support package included the following: -

- The Student Benefit Package (Perks including Laptop, Catering Vouchers, Accommodation Discount etc)
- Standalone bursary
- Carers Bursary
- Care leavers bursary
- Hardship fund
- Financial guidance

There are two main limitations on this report and the findings

Firstly, the report does not include an evaluation of academic partners' financial support package. Within the current APP, sub-contract partners can vary the financial support provided to our students studying with them dependent upon local requirements, differential student needs, and a comprehensive equality impact assessment identifying the appropriate approach required. As many of these partners are in the early stages, longitudinal data is not yet available, however an assessment of these arrangements and the impact of the different packages will be undertaken in preparation for the APP rewrite due later in 2023.

Secondly, there is inconsistency in record keeping, data management, reporting, and data sharing across departments which has hampered the research team's ability to interrogate the data fully. While GDPR has been used to block the sharing of data, it is acknowledged that some areas are under tremendous workload pressures and using systems that do not support the record keeping and reporting required. While this has improved significantly since the first report was produced, two years ago, more work is needed to improve these issues.

## **2. The Impact of the University of Northampton Financial Support Package in Overcoming Barriers to Student Success**

This section summarises the statistical analysis, suggesting the impacts the financial support package has at overcoming the financial barriers to student success on continuation, completion, good degree outcomes, and graduate outcomes.

### **2.1 Impact on Continuation**

There are no statistically significant findings on the impact of financial support on supporting students to continue from level 4-5. However, there are indications mature students in receipt of financial support (aged 21-24 at the start of their studies) are most likely to continue, GEM students are more likely to continue than their white peers, and those without a disability are more likely to continue than those with a declared disability. Finally, those students from working class backgrounds (defined as coming from households from areas of highest multiple deprivation, IMD Q1). There is also an indication the accommodation discount is more likely to positively impact on student continuation between level 4-5 than the other perks offered.

### **2.2 Impact on degree completion**

Overall, there is evidence UON's financial support package has a positive impact in addressing barriers to degree completion. However, the impact is maximised where students receive £1,000 per annum in financial support. These students were 45.7% more likely to complete their degrees than those receiving lower amounts, and above this level the impact experiences diminishing returns.

There is no positive impact evident in closing the gender or GEM completion gaps with female receiving £1,000 per annum remaining at circa 14% more likely to complete their

degrees than male students in receipt of the same amount of funding, and all ethnicities between 20-38% less likely to complete their degrees than white students. Where we have data, there is evidence that targeted financial support rather than means tested or generalised provision has the greatest impact, e.g., students with disabilities in receipt of DSA are 120% more likely to complete their degrees than those with no declared disabilities. Students who do not receive DSA but have accessed financial support at UON are 35% more likely to complete their degrees than students accessing financial support with no disability. The indication is targeted funding is utilised to pay for additional support with studies rather than address a specific financial need, but lack of data was unable to confirm this hypothesis.

### **2.3 Impact on Degree Classification**

Overall, while there are indications UON's financial support package impact on degree completion, there is no evidence it has any impact on degree classification with gaps in gender, ethnicity, and between socio economic groups persisting. The use of financial support appears to be a blunt tool with further research needed to understand what the financial barriers are and how they can be overcome to support other approaches to obtaining good degree outcomes.

### **2.4 Impact on Graduate Outcomes**

There is no evidence UON's financial support package positively impacts on graduate outcomes. Gender, Ethnicity, and socio-economic gaps and performance remain unchanged. The exception being students with a declared disability where students in receipt of DSA are 22% more likely to obtain graduate roles compared to those students with a disability who do not received DSA.

The indication is positive graduate outcomes are determined by good degree and student success outcomes rather than the amount of financial support received, and by targeting financial support earlier in the student lifecycle to meet specific student needs at amounts around £1,000 per annum could impact good degree and graduate outcome indicators.

## **3. Findings from the Student Survey and Interviews**

This section draws out the key themes and findings identified from the survey and interview tools. These reflect the views and perceptions of current students, building on previous reports. Overall, the findings reflect those of previous reports focussing on

- The need to improve communication of the financial support offer to students,
- The impact of the cost-of-living crisis,
- Access to, and transparency of, the hardship fund,
- The development of a more specialist and a tailored careers offering
- The need to improve data capture, monitoring, and reporting.

These are covered, in summary, in the following sections in the format of findings, recommendations, and actions that are both underway and suggested.

### **3.1. Improved Communication of Financial Support Provision Remains a Priority.**

Prior to enrolment, students have access to a vibrant environment of financial information on student loans and budgeting, provided by a range of stakeholders within their schools, online, and via UON and other universities. After enrolment, needs become more complex and related to specific individual requirements, with students reporting they find it difficult to communicate with the University and finding it difficult to access relevant information. In addition, the current package is perceived as complex, confusing, and difficult to access. For example, a care leaver noted they were unaware of the support available to them, leading to a reliance on working full-time whilst studying, impacting their grades and overall experience. Students noted a lack of transparency and difficulty in understanding what they are entitled too as the support is complex and at times appears to duplicate. There are suggestions students have a need for guidance and support that covers wider financial and legal guidance beyond hardship and bursary entitlement, with difficulties suggested in accessing support from the University regarding housing issues (this was a minor issue) interacting with banks and managing their finances better. Finally, participants highlighted the impact of financial stress on their friends', and their own, mental health leading to lower levels of continuation. This emphasised the findings of previous APP reports detailing the need for more structured and clear communication, a more simplified package, and proactive referral of students between departments and academic colleagues to ensure specialised student support needs are identified and provided as quickly as possible.

**Recommendation 1.1** Consideration given to exploring how UON can improve the existing signposting and access to appropriate information for students on the financial support available to them and improve access to such information through their Personal Tutors and other curriculum-based staff, NILE sites etc.

#### **Actions**

- Work has begun on the development of targeted comms to specific APP cohorts outlining support and opportunities which will support students' success. Work with IT, e-comms manager, student services managers to develop a timeline of relevant and impactful e-comms for September 2023 launch.

**Recommendation 1.2** UON explores the adoption of a proactive onward referral process via CRM or some other mechanism rather than leaving students to make their own arrangements, which in many cases they don't.

#### **Actions**

- Senior Business Analyst within IT has initiating meetings and discussions with Head of Student Services and student services section managers to direct the development of a UON Case Management System. APP considerations have been included in these initial discussions

**Recommendation 1.3** review, develop, and introduce a less complex financial support package targeted towards specific gaps and student demographics as part of the next APP. This should include an evaluation of the financial support provided by partners.

#### **Actions**

- Immediate development of a review group lead by Director of enterprise and Employability to streamline the bursary system. Also work developing on the financial support package for the new APP 2024 – 2027.
- APP Manager working with academic partners to design and implement FSP's in their institutions which align with UON's. These will be reviewed semesterly alongside their TOC commitments. Cost implications of academic partner FSP evaluations are currently being reviewed and developed.

### 3.2. The Cost of Living is Impacting Some Students More Than Others.

Students noted the impact the increased costs of living had on their studies, with many having to work over the suggested number of hours (15 per week) to remain financially secure while studying. These issues are compounded by the 'hidden' costs of study, with students noting high perceived on-campus prices of food and drink<sup>1</sup>, travel to the University, and costs of course related materials and trips. Students on placements reported experiencing additional expenses and delays on cost reimbursement they had not budgeted for or expected.

In many cases, although students were aware of there would be additional costs, they appear to be more at-risk of the impact of the increased cost-of-living, with delayed reimbursements for associated costs requiring them to take on additional work whilst studying. Also, having to apply for scholarships and means tested support adds to their stress, takes time, and there is no guarantee of success. Earlier intervention with information and guidance would help students prepare for these costs. The current cost-of-living project is addressing the need to help students, including free cereal, promotion of apps to find cheaper petrol, and the locations of warm spaces, but the need for more direct financial support is indicated to address these specific issues.

**Recommendation 2.1** review and revise as appropriate how and where information related to placement and course costs, expectations, and implications is made available and consider how to improve accessibility. Information related to the support available should be made available to students on courses with placements or where there are additional course costs with clear criteria and deadlines communicated directly with students.

#### Actions

- Work with the placements team to ensure that students and academics are aware of existing information surrounding placements. Where there are gaps in this guidance and support, develop appropriate resources that are easily accessible. Targeted e-coms to cohorts with placements will support this recommendation and this conversation with the E-coms team has been initiated.

**Recommendation 2.2** consideration to be given to how UON could diversify the existing Northampton Bursary, and/or introduce a placement or course cost bursary to assist APP students with these additional costs.

#### Actions

- This will be completed alongside the overall Financial Support Package review conducted by Director of Enterprise and Employability as part of Recommendation 1.3

**Recommendation 2.3** The impact of the cost-of-living project on APP student success to be included in future APP evaluations to assess the impact and inform future support.

#### **Actions**

- Cost of Living Working Group in place with representation from across professional and academic services to address these issues. APP Manager has membership of this group and ensures impact on APP targeted students is central to discussions

### **3.3. Improvements in Feedback on Unsuccessful Financial Support Applications is Needed.**

It was noted by participants that some had made multiple unsuccessful applications for financial support. Where provided, in many cases students felt they had addressed the feedback in future applications but still failed to access support. There was a feeling the feedback was either insufficient or not provided, and when unsuccessful there was a lack of understanding on what other options a student had available to them. This builds upon previous reports where students expressed a sense of being stigmatised when needing help, a perceived lack of ways to make an application, and a lack of transparency over decision making. While the evaluation recognises a lot of work has been undertaken to address previous feedback and recommendations, this has not yet impacted on the perceptions students have over their unsuccessful experience.

**Recommendation 3.1** The University should review and consider how improvements in the hardship fund application process can be made with regards to informing and supporting unsuccessful failed applications and avoid multiple failed applications.

#### **Actions**

- Work to be completed alongside the overall Financial Support Package review conducted by Director of Enterprise and Employability as part of Recommendation 1.3. This will be complimented by the targeted e-coms project.
- The development of a UON Case Management IT system could be the mechanism to address this issue following initial discussion with IT Senior Business Analyst.
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**Recommendation 3.2** Review and improve data capture and reporting of applications for financial support across all provision to inform future provision design, better understand student needs, provide transparency, and comply with the Equality Act public sector duty.

#### **Actions**

- Work to be completed alongside the overall Financial Support Package review conducted by Director of Enterprise and Employability as part of Recommendation 1.3
- The development of a UON Case Management IT system could be the mechanism to address this issue following initial discussion with IT Senior Business Analyst.

### **3.4 Introduce Specialist Employability Support Provision to Improve Graduate Outcome Destinations for all APP priority students.**

An area for further consideration is the relationship between the provision of financial support, addressing degree results, and the impact on positive graduate outcome destinations. Currently, disabled students who do not receive DSA only have a 79.4% likelihood of having a positive graduate outcome destination than their non-disabled peers, despite being more likely to complete their degree and receive higher grades. Findings from the APP Student Success End of Year Report 2022 discussed a lack of specialised employability support for disabled students who felt the work experience, placement offer, and employability offer was employer-led, rather than student-needs driven. This finding on financial support may provide further evidence of this issue, with students with specialised needs not accessing specialist provision required or appropriate support for future employment or study.

**Recommendation 4.1** Following on from recommendations in the APP Student Success End of Year Report 2022, the findings of this report further support the need to develop specialist employability and work experience support for students with additional needs, with the indication the generalised support being provided being ineffective in increasing the likelihood of positive graduate outcome destinations where additional needs require addressing.

#### **Actions**

- Successful application to Meta and employability skills company Body Swops for 2x VR headsets and access to VR employability resources to support neurodiverse students with employability opportunities.
- Additional Needs Team to input into The Directorate of Enterprise and Employability staff development opportunities developed through the Directorate bi-weekly briefing opportunity. Changemaker hub staff development

**Recommendation 4.2** Explore how graduate employment pathways with local employers can be improved for students with declared disabilities and other APP priority groups.

#### **Actions**

- Work is in progress to address this recommendation through the Employer Relations Team working with third sector organisations and businesses to develop employment pathways. For example; The UK Young Autism

Project. Autism UK are working with undergraduates in Psychology and Sociology identifying employment opportunities; Leadership of the county's Diversity and Inclusion Forum is leading to the raising awareness of EDI and GEM recruitment opportunities; Relationship building with Barclays various Employer Resource Groups (twelve groups) for mentoring and role model identification and black professional resource group opportunities with UON students.

### **3.5. Improve Data Collection, Reporting, and Monitoring to enhance the APP Evaluation and Services to Students.**

Confirming the findings of previous reports there remains a lack of consistency, process, and prioritisation of capturing and reporting data related to service provision. This issue is wider than financial support but has limited the findings and understanding of the impact of UON's investment in financial support in this instance. The team acknowledges the hard work of all departments in trying to capture data and the pressures they face from student demand, however inconsistent use of CRM, over reliance on spreadsheets, and the barriers in place due to the way GDPR is applied will need to be addressed if progress is to be made in improving student outcomes and achieving APP objectives.

**Recommendation 5.1** It is important for all departments involved in delivering services which fall within the APP to adopt systems for data collection that allow databases to be appropriately monitored and maintained and continuous improvement cycles to be informed. This will ensure alignment with the Equalities Act and enable more in-depth data collection for the evaluation on the impact of, and the improvements needed to, UON's financial support for students.

#### **Actions**

- This is an important action that the APP Operations Group are taking forward and workshopping to discover how it can be implemented effectively as a strategic intervention alongside the new APP.
- Student Services team have purchased the Titanium platform which will support this recommendation
- The development of a UON Case Management IT system could be the mechanism to address this issue following initial discussion with IT Senior Business Analyst.

#### **4. Areas for further research**

The following areas for further research have been identified to be included in the next evaluation or, funding permitting, as separate research projects:

- 1. Perk's bursary and Academic Investment.** Participants positively noted the impact the Perk's bursary had on them (the choice of a laptop, accommodation discount, or vouchers for on-campus food outlets). Previous

reports, and reinforced in this report, identified that although financial support encourages students to complete their degree, it has little impact on degree results. There are indications; however, that students who receive targeted financial support are more likely to invest into their academic needs, either through subscriptions to journals, materials, or field trips. Utilising theories of 'Mental Accounting', further investigation on the development of targeted support focussed on student success in their studies may help unpack whether the Perk's bursary leads to higher attainment and how it could be adapted for this purpose.

2. **Signposts toward Financial Guidance.** The current evaluation focusses on the monetary elements of financial support and fails to consider the impact of financial guidance provision. Indications are that when a student engages with the financial guidance team their experience is positive, however understanding this added value would help identify how this type of support can be targeted to support APP priority groups especially where limited impact has been seen in closing gaps. This could include an analysis of applications to the hardship fund to identify student needs, trends in both successful and unsuccessful applications, and potential service improvements.

3. **The Impact of the Accommodation Perk.** Currently, first year students who opted for the accommodation discount appear more likely to continue into their second year than those who picked either the laptop or catering vouchers. Although this is not currently statistically significant, further research should be conducted to measure the impact of the different perks on student continuation outcomes to inform the offer as part of continuous improvement.

4. **DSA and Non-DSA outcomes.** The evaluation identified interesting trends in student outcomes for students with declared disabilities across the student life cycle which raised several hypotheses. A deeper understand of how financial support impacts on these students, identification of the different experiences of disabled students, and a mapping of students' journey through the support available could improve service provision to improve outcomes.

5. **Evaluate Academic Partner Provision.** While an assessment of the financial support provided by partner institutions is planned as part of Impact Assessment for the APP rewrite, there is a need to ensure ongoing evaluation is undertaken. This is not currently budgeted for within the current evaluation and needs consideration. This would be especially beneficial in ensuring alternative provision is effective, identifying alternative best practice approaches that could be shared across all providers, and any potential areas of discrimination across providers are identified and addressed.