

# Rapid Review of Student Aid Programmes

August 2023





# CONTENTS

This synthesis report is composed of two substantive sections, along with additional appendices which provide further information:

Contents	Page No.
Executive Summary	3
1. Introduction	4
2. Key findings	10
References	20
Appendix 1: The research process	27
Appendix 2: Overview of student aid programmes	28
Appendix 3: Case Study example	34

## Acronyms:

- ADB – Asian Development Bank
- DMC – Developing Member Country
- GPA – Grade Point Average
- HOPE - Helping Outstanding Pupils Educationally
- JSP – Japan Scholarship Program
- MPS - Milwaukee Public Schools
- NSP – National Scholarship Programme
- OCOG – Ohio College Opportunity Grant
- STBF – Susan Thompson Buffett Foundation
- STEM – Science, Technology, Engineering and Mathematics

## Assumptions and limitations

This report is based on a rapid review of publicly available information, rather than a systematic review of the evidence. The findings are for general guidance only and have not been verified independently. See full list of documents consulted in References.

The review found limited research examining student aid programmes in the UK and care should be taken in interpreting findings from programmes abroad as the contexts differ. Limited research was also found examining the impacts of specific components of programmes and so clear conclusions on which types of student aid programmes are most effective cannot not be drawn.



# EXECUTIVE SUMMARY

## Further/Higher Education is one key driver of social mobility, but some face barriers to access

Completing further and Higher Education leads to higher levels of income, better employment prospects, and better overall life satisfaction and outcomes.

Despite the increasing number of students seeking to access Higher Education, students from disadvantaged backgrounds are much less likely to gain access than their peers. When they do gain access, students from disadvantaged backgrounds are less likely to complete their degree.



## Student aid can be effective at reducing these barriers...

Studies\* indicate that the short- and medium-term impact is predominately positive, and includes increased enrolment, persistence and degree completion.

Other less tangible psychological outcomes include raised aspirations, reduced financial anxiety, increased motivation to work harder and a greater sense of belonging.



## ...but more research is needed on longer-term impacts

While there are fewer studies measuring the longitudinal impacts, some have shown positive long-term effects such as increased access to chosen careers, better financial health, increased earnings and more likely to own a home.

There is also evidence of impact of additional support such as mentoring, tutoring and career guidance which help to overcome non-financial barriers around social and cultural capital which may emerge in the longer term.



## And some considerations for maximum impact include...

Ensuring eligibility criteria and application and selection processes are clear, simple and well communicated.

Considering any possible unintended negative consequences of the programme, such as creating pervasive incentives to join a degree that is not a good match for the recipient.

Monitoring and communicating the learnings about the programme and its impacts and adjusting the design accordingly.

\*This summary draws on the full list of sources, which are provided in the References section on pages 21- 26

# 1. INTRODUCTION



# INTRODUCTION

## Context

- The Leathersellers' Company has a long history of focussing on social mobility. Recently, it commissioned a rapid review of the social mobility landscape in England, followed by a strategic review of its Education portfolio through the lens of social mobility, looking at current and recent grantees.
- A significant component of the Education portfolio comprises direct funding to students through scholarships to attend Colfe's Sixth Form programme, as well as grants for students to attend UK universities (see box on right panel).
- The Company is keen to capture and understand the impact of these programmes on social mobility, and to inform the future approach to support with evidence of the effectiveness of similar programmes in the UK and internationally.

## Purpose of this review

- The Leathersellers' Company commissioned this report to summarise the evidence on the impact of past or existing student aid programmes in the UK and internationally for sixth form (or equivalent), undergraduate and graduate education<sup>1</sup>.
- This rapid review examines schemes in relation to their scope, reach, criteria and outcomes. The purpose of this report is to provide an accessible summary of evidence to shape and inform the design of the Company's upcoming evaluation of its Sixth Form Scholarship and Student Grant schemes.



*“Social mobility is the idea that every child or young person facing disadvantage is supported to realise their full potential, whatever pathways they choose to pursue.”*

*- Leathersellers' Company definition of social mobility*



### Sixth Form Scholarships

Colfe's is an independent day school in south-east London with a strong historical connection to the Leathersellers' Company. The Company provides scholarships to up to 20 pupils (per annum) from disadvantaged backgrounds in state schools to attend sixth-form at Colfe's with the intent that these pupils will then gain places at top universities. Independent evaluations of the programme were conducted in 2016 and 2020, which focused on the short-term impact of the programme, as well as recommendations to improve operations.

### Student Grants

The Student Grants programme is one of the most significant and long-standing components of the Company's portfolio. It provides support to students from disadvantaged backgrounds to attend a UK university, recently focusing on students who are care leavers and/or are students of the Leathersellers' Federation of Schools or Colfe's School. It provides £5,000 per annum for up to four years to each grantee. The programme has had substantial reach of 3,000 students to date, however the impact of the scheme is yet to be comprehensively assessed.

## Notes

1. This report considers grant schemes, scholarships and bursaries (but does not include student loans programmes). For simplicity, these are referred to as student aid programmes throughout the report.



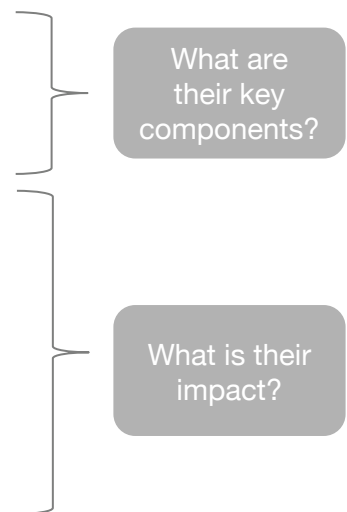
# OUR APPROACH

## Research questions

Key research questions for this rapid review were identified with the Leathersellers' Company as follows:

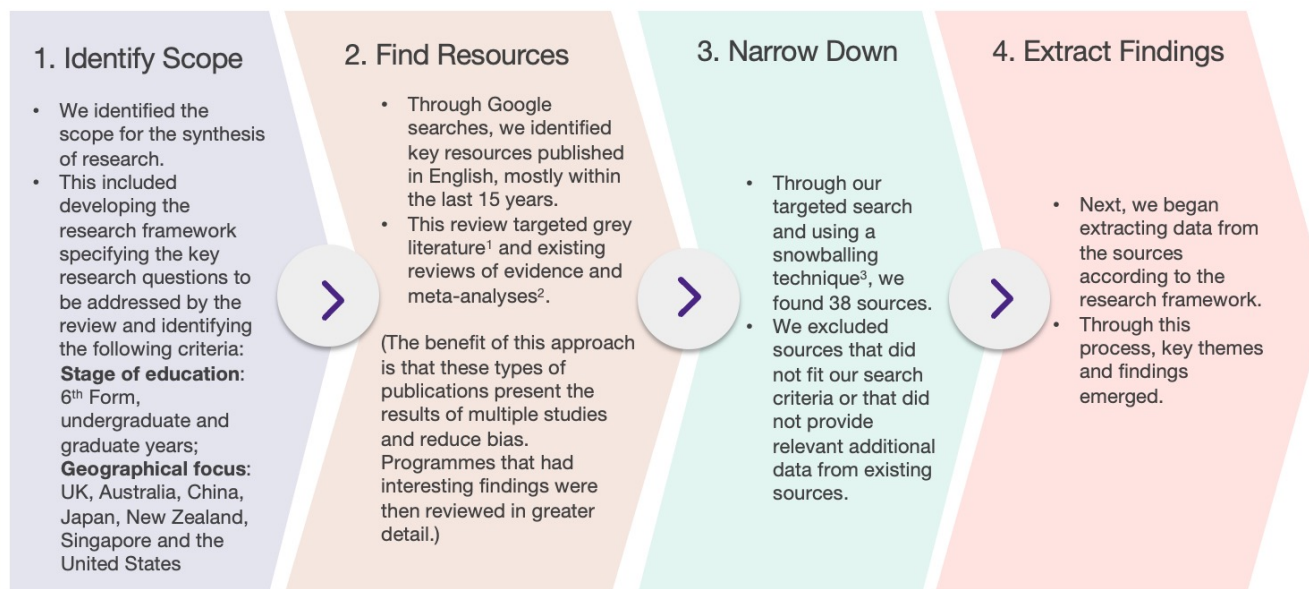
**For existing or previous student financial aid programmes in the UK and internationally:**

1. What is the scope, or main components of the programmes?
2. What is the reach or type of beneficiaries targeted?
3. What are the selection criteria?
4. What are the metrics used to measure success?
5. What are the achieved outcomes in the short, medium and long-term?
6. What are the impacts on families, schools and communities?



## Our rapid synthesis approach

To answer the research questions, we conducted a rapid review following the steps outlined in the figure below (see also Appendix 1).



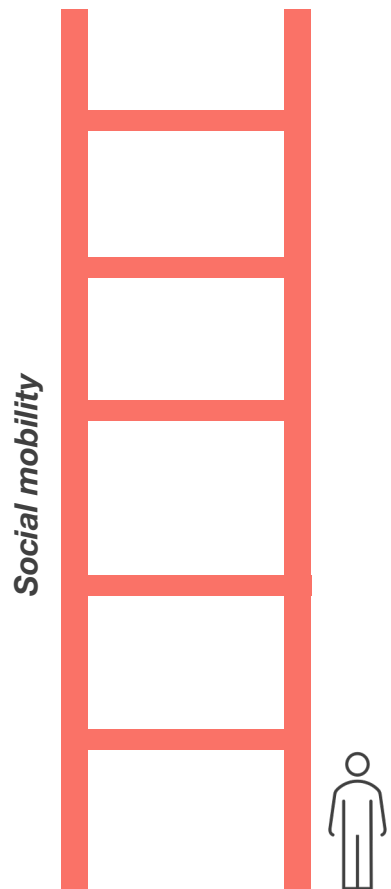
A full list of research consulted can be found in the References and a summary table found in Appendix 2, which breaks down the research by level of education and geographical focus.

### Notes

1. Grey literature: Literature that has not been published in a peer-reviewed journal.
2. Meta-analysis: Examination of evidence from a number of independent studies on the same subject, in order to establish overall trends and levels of effects.
3. Snowballing: A method that consists in finding sources using citations in another source.



# THE IMPORTANCE OF FURTHER & HIGHER EDUCATION IN THE CONTEXT OF SOCIAL MOBILITY



Further and Higher Education are **core drivers of social mobility within the UK and beyond**. Young people from disadvantaged backgrounds who attend university are **more likely to attain higher levels of income**. Further, **income gaps are lower** between **graduates** from disadvantaged backgrounds and non-disadvantaged graduates.



**Financial aid programmes** that support disadvantaged students to access Further and Higher Education play a **crucial role in increasing social mobility**. However, **public documentation of impact** achieved through programmes within the UK is **uncommon**.



This therefore poses a risk of programmes not being as evidence-driven and informed as possible. Within **young people eligible for free school meals at the age of 15 being 70% less likely to enter Higher Education by the age of 19 than those who are not eligible**, **evidence generation and dissemination on 'what works' to close this gap is crucial**.



This report enables The Leathersellers' Company to **understand key drivers of impact** for the Sixth Form Scholarships and Student Grants programme, and more **broadly can contribute to the limited literature currently available** within the UK sector.



# THE LITERATURE IDENTIFIES THREE BROAD FINANCIAL AID MECHANISMS

The research reviewed revealed **three broad categories of student aid mechanisms**. These mechanisms are not mutually exclusive, as some programmes offer multiple types of support, or there is flexibility in how the funding can be used.

The next page presents example programmes from each of these categories.

1

## Tuition support

Provision of financial support to fully or partly cover **tuition fees** for the student.

2

## Other monetary support

Provision of **financial aid** for **indirect costs**. These may be areas where students may face barriers **beyond the scope of tuition** such as **accommodation** and **school supplies**.

3

## Non-monetary support

Provision of non-financial support especially designed to **mitigate less tangible social, emotional and cultural disadvantage**. This may be through **mentoring**, **peer connections**, etc.

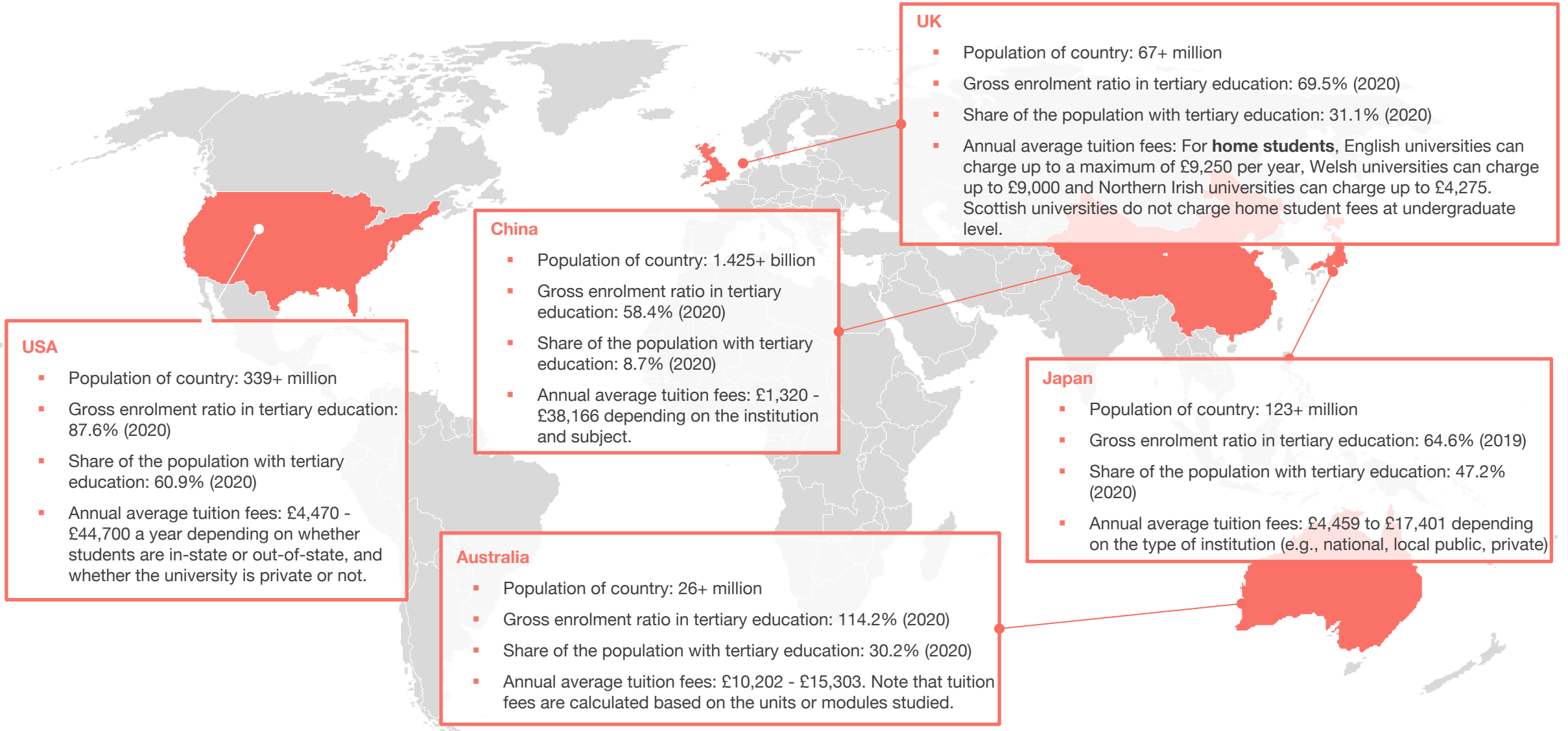
The Leathersellers' **Sixth Form Scholarships** programme is an example of mechanism that offers primarily the first type, **tuition support**, but also with some additional non-monetary support provided by Colfe's.

The Leathersellers' **Student Grants** programme is an example of mechanism which offers both **tuition support** as well as **other monetary support** in that the funding can be used to pay for part of tuition costs, as well as to pay for the grantee's accommodation or other needs. Recently, non-monetary support in the form of mentoring and networking opportunities have also been made available to grantees.





# COMPARISON OF STATE OF HIGHER EDUCATION ACROSS COUNTRIES

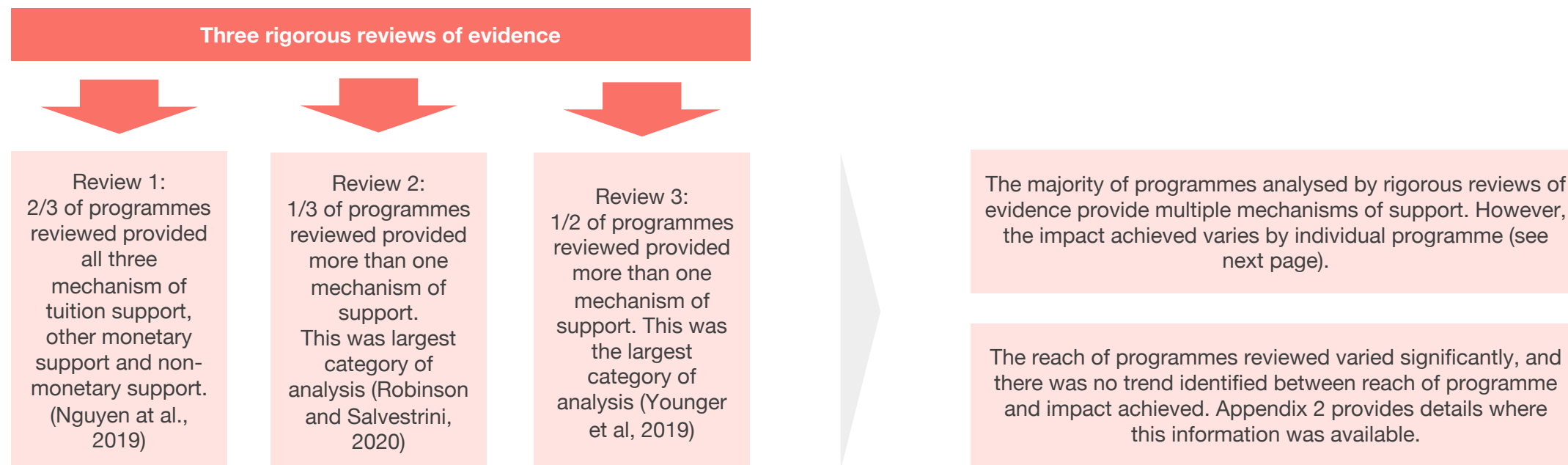


## 2. KEY FINDINGS



# RIGOROUS REVIEWS OF EVIDENCE INDICATE MOST PROGRAMMES PROVIDE MORE THAN ONE MECHANISM OF SUPPORT AND VARY IN REACH

**Financial barriers** are often at the **centre of concerns** about higher education opportunities for disadvantaged students. In some countries such as UK and China, the costs of **Higher Education have increased at an exponential rate**, raising concerns around affordability. However, barriers to higher education are **not solely financial**, students also **face challenges** around **less tangible but equally significant barriers** around **cultural capital** and **how to effectively navigate the schooling experience**.





# THERE IS STRONGER EVIDENCE ON THE BENEFIT OF COMBINING A RANGE OF MECHANISMS THAN OF SIMPLY PROVIDING TUITION SUPPORT

## Impact of tuition support

The impact of solely monetary support is **unclear and mixed**, with some evidence of a positive effect on enrolment, but a decreasing marginal impact on outcomes as the funding rises.

## Impact of other monetary support

Impact of monetary support beyond tuition fees is more promising compared simply to funding of tuition fees

## Impact of non-monetary support

Programmes that **combine support mechanisms** can have **positive Higher Education** outcomes such as enrolment, persistence and academic performance, though this is not always the case. **Drawing conclusions on the impact of specific components is also challenging** as it is **difficult to infer** which precise elements or combination of elements **produce greatest level of impact**.

● A study examining **The Degree Project** launched in US Milwaukee Public Schools found **no impact on enrolment for higher education**.

● A study on the **Ohio College Opportunity Grant (OCOG)** revealed more favourable impact whereby an **additional \$750 encouraged** low-income students to **enrol at four-year public colleges**.

● A study of 9 UK universities found similar positive outcomes, but with a **decreasing marginal impact** further than an increase of **£1900** or more.

● **The National Scholarship Programme (NSP)** provided university students with fee waivers **cash awards, subsidised/free accommodation, subsidised learning materials and/or travel allowance**. Results **were more positive** from those who **received additional monetary support** compared to those who only received fee waivers (see Case Study 2 in Appendix 3).

● **The Swinburne University** scholarship in Australia provided students **tuition support, indirect cost** supports such as **accommodation, textbooks and other school supplies**. **2/3 students agree** that they had **increased financial stability and a better of quality of life** which in turn enabled students to remain in university and **focus more on their studies**.

● The **Carolina Covenant scholarship** provides **mentoring by faculty and peers, career advice, professional development activities and social events**. It was found that these non-monetary mechanisms **improve progress and performance** of disadvantaged groups **more than when predominately offered basic monetary** support.

● A **combination of a scholarship and mentoring** for a US based community college programme resulted in **quadruple enrolment** rates.

● A study of the **Dell Programme** found that providing a combination of a scholarship, further academic support, and counselling **did not have an impact on enrolment rates**. However, there was **positive impact** with **persistence and completion rates** with 8-12% more likely to persist into their third year of college and 6-10% more likely to earn a bachelor's degree within four years compared to non-recipients of aid.

### Legend

- Positive impact
- No impact



# PROGRAMMES VARY IN THE CRITERIA THEY USE TO SELECT STUDENTS, BUT MANY COMBINE NEED AND MERIT IN THEIR SELECTION APPROACH

- Selection criteria for grant schemes **vary by geographical context** and by **type of financial aid**. Our review highlights **three broad selection categories: needs-based, merit-based and need-merit based**. Additional characteristics of target grantees are often added. Examples of each type can be found on the next page and in Appendix 2.
- Within the UK, after the flagship National Scholarship Programme ended, most universities continued to **offer their own financial aid to support students**. A study by Robinson and Salvestrini (2020) highlighted **complexity** of this as universities set their own criteria, application processes and levels of financial support.
- **Complicated processes** can be a **barrier for students to apply for and receive financial aid** and therefore there is a risk of inadvertently reducing the potential reach and impact. In order to enhance the effectiveness of schemes, the application **process** should be as **clear and simple to navigate** as possible.

Type	Description	Example criteria
Needs-based	<ul style="list-style-type: none"><li>• Aid awarded based on student's financial needs and ability to pay for education. These types of programmes typically target students from disadvantaged backgrounds.</li></ul>	<ul style="list-style-type: none"><li>• Eligible of national support benchmarks such as aid criteria such as Free School Meals (UK), Federal Student Aid (USA), Centrelink welfare payment (Australia)</li><li>• Household income below £42,000 or country currency equivalent</li></ul>
Merit-based	<ul style="list-style-type: none"><li>• Aid awarded based on student's achievements and/or interests. A sub-category of this are 'promise grants', whereby aid is provided to encourage students to attend university within state or to pursue certain areas of study.</li></ul>	<ul style="list-style-type: none"><li>• AAB at A-level (UK)</li><li>• 80% and above school attendance</li><li>• Pass interviews (USA)</li><li>• Skills assessment (USA)</li></ul>
Needs-Merit based	<ul style="list-style-type: none"><li>• Aid awarded based on a combination of students' financial needs and achievement and/or interests.</li></ul>	<ul style="list-style-type: none"><li>• Eligible for Federal Student Aid and 2.4 GPA (USA)</li></ul>

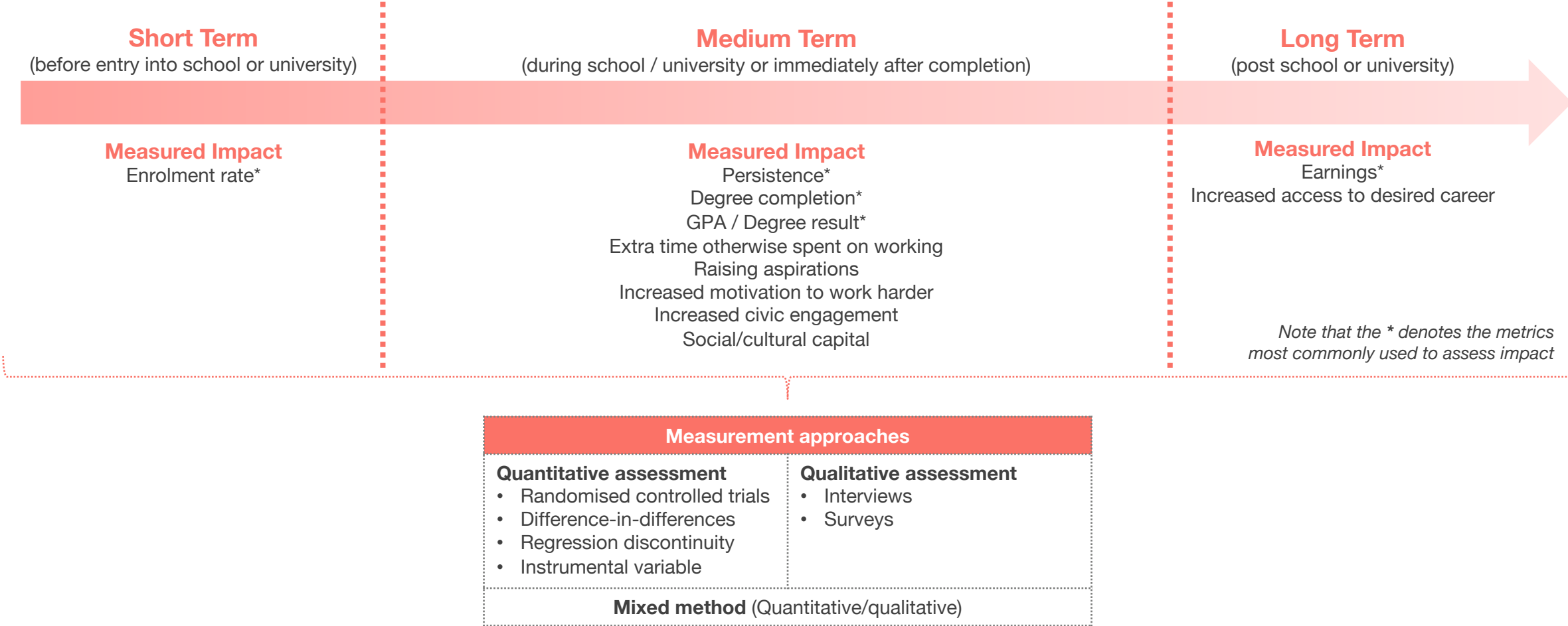


# PROGRAMMES ALSO VARY GREATLY IN THE PROCESS FOR AWARDING FUNDING, BUT THE EFFECT OF THESE DIFFERENCES IS UNCLEAR

Type	Programme	Selection criteria	Selection process and responsibility
Needs-based	Pell Federal Grant (see also Case Study 1 in Appendix 3)	<ul style="list-style-type: none"><li>Students are required to submit a Federal Student Aid application stating financial information. The Federal Student Aid form is used to calculate student/family income and subsequently how much they are eligible to receive.</li></ul>	<ul style="list-style-type: none"><li>The federal government funds the programme, selects eligible students and determines the amount of each student's grant.</li></ul>
Merit-based	Posse Foundation	<ul style="list-style-type: none"><li>Students must be nominated by their high school, demonstrate leadership abilities within the schools, families and/or communities and demonstrate academic excellence (<i>No GPA requirement however</i>).</li></ul>	<ul style="list-style-type: none"><li>The Foundation uses a unique selection method called the Dynamic Assessment Process. The process is designed to allow students to showcase their leadership and teamwork abilities through a combination of individual and team interviews.</li></ul>
Need-Merit	The Cape Cod Foundation	<ul style="list-style-type: none"><li>The Foundation provides over 90 scholarship programmes. The selection criteria varies by programme and can be based on financial need, academic achievements, community involvement and extracurricular activities. Some criteria include GPA of 3.0, qualify for financial need determined by Financial Student Aid reports. For full list, please see the <a href="#">scholarship handbook</a>.</li></ul>	<ul style="list-style-type: none"><li>Applications are reviewed by The Foundation's Scholarship Committee. The Committee is formed by an open call to volunteers who can demonstrate competencies such as ability to work with others in a team environment and understanding the need for fairness, objectivity and nondiscrimination.</li></ul>
	William G. & Marie Selby Foundation	<ul style="list-style-type: none"><li>Demonstrated financial need</li><li>Minimum 3.0 GPA</li><li>Letter of recommendation from teachers/community members</li><li>Student personal statement</li><li>Interview</li></ul>	<ul style="list-style-type: none"><li>Applications are reviewed by The Foundation's Scholarship committee which consists of a Scholarships and Special Projects Manager and volunteers with diverse knowledge and backgrounds. Those selected for interviews are reviewed against five factors – academic preparedness, academic rigor, commitment, resourcefulness and resilience.</li></ul>



# THE MOST COMMON METRICS TO MEASURE IMPACT ARE ENROLMENT, PERSISTENCE, DEGREE COMPLETION / RESULT AND EARNINGS



Sources: Robinson and Salvestrini (2020); Mattana (2018); Nguyen et al. (2018); Kaye (2020).



# STUDENT AID PROGRAMMES GENERALLY HAVE AT LEAST MODEST POSITIVE IMPACTS ON STUDENT ENROLMENT

**Short Term**  
(before entry into school or university)

---

**Measured Impact**  
Enrolment rate\*

**In the short-term, evidence across the studies suggest the following overall impact of student aid programmes:**

- Financial aid programmes are **designed to increase access to university**, whether that is underpinned by need and/or merit. Enrolment rates are therefore a key metric measured when assessing the impact of programmes.
- By reducing the financial cost of participating in Higher Education, financial aid programmes help to remove barriers that may otherwise act as a deterrence. A robust finding across the sources reviewed suggest a small but robust positive effect of student aid programmes on **enrolment rates** (increase of 2 to 3 percentage points).
- Expectedly, there is **a degree of variation with outcomes achieved depending on the programme and context**. The Susan Thompson Buffett Foundation scholarship reported that financial aid increased probability of enrolment of first year college students by 2 percentage points, this was increased to 7.2 percentage points in the Sophomore year (UK Year 11 equivalent).
- A rigorous study of The Greater Kanawha Valley Foundation scholarship showed that **25% of students would not have been able to attend university without the scholarship**.





# AID PROGRAMMES ENABLE STUDENTS TO STUDY LONGER, BUILD THEIR SOCIAL CAPITAL AND HAVE A MORE POSITIVE EXPERIENCE OVERALL

Some key findings around the overall medium-term impacts of student aid programmes include the following:

- Research consistently finds that financial aid increases **student persistence** (year-on-year attendance) and **degree completion** (though in some cases, the impact is relatively small, ranging from 0.4 to 3 percentage points).
- The **Macquarie University** in Australia separated the impact achieved into tangible and intangible outcomes. There was an emphasis of the intangible impact of ‘extra time’. This refers to the benefit for students to have more free time due to not having to simultaneously study and work to support themselves. This extra time allowed students to **engage more in academic and social endeavours** which contributed to **higher grades** and led to a **greater sense of security, belonging** and **reduced financial anxiety** which all contributed to a **more positive university experience** (see also Case Study 3 in Appendix 3). This, however, does not always occur organically; studies recommend that programmes also support under-presented groups in all aspects of integration within education.
- This is echoed with a study on Swinburne University, Australia whereby **two-thirds of students** stated that the greatest benefit of scholarships to students is **financial security and improved quality of life**.
- Evaluation of the **UK’s National Scholarship Programme (NSP)** also showed positive outcomes with 78% of students agreeing that they were **more able to participate more in university/college life** and 79% agreeing they were **more likely to complete their studies** (see also Case Study 2 in Appendix 3).
- A study of nine UK universities showed that recipients of financial aid are **more likely to graduate with a 2:1 classification and above**.

**Medium Term**  
(during school / university or immediately after completion)

---

**Measured Impact**  
Persistence\*  
Degree completion\*  
GPA / Degree result\*  
Extra time otherwise spent on working  
Raising aspirations  
Increased motivation to work harder  
Increased civic engagement  
Social/cultural capital

Sources: Nguyen et al. (2019); LaSota, Polanin & Perna (2022); Reed and Hurd (2016); CFE Research and Edge Hill University (2014); Murphy and Wyness (2015).



# LONG-TERM EVALUATIONS DEMONSTRATE HIGHER EARNINGS AND INCREASED ACCESS TO DESIRED CAREERS DUE TO STUDENT AID PROGRAMMES

**Long Term**  
(post school or university)

---

**Measured Impact**  
Earnings\*  
Increased access to desired career

Although there is not a significant amount of evidence around the longer-term impacts of student aid programmes, some key takeaways from the review include:

- Studies that have analysed longitudinal effects have shown **positive outcomes in career pathways** and **higher earnings**.
- Recipients of the West Virginia Promise Scholarship were found to be more **likely to own a home**, **live in higher-income neighbourhoods** and have more **financial stability** than those who did not receive the financial aid.
- The Scholarships in Science, Technology, Engineering and Maths (S-STEM) programme resulted in **nearly all recipients remaining in STEM**, either by starting a job in a STEM field (19%), pursuing an additional form of education in STEM after graduating (46%), or both (30%).
- Evaluation of The Dell Programme found that recipients were **better placed financially** and 63% **less likely to take on private loans** than the control group who did not receive financial aid.
- The Greater Kanawha Valley Foundation scholarship found that recipients had 50% **less debt post-graduation** than the national average and **earned 20% higher income** than their counterparts.



# IMPLICATIONS FOR LEATHERSELLERS TO CONSIDER



## There is a lack of research.

This rapid review suggests a relative lack of research examining the impacts of student aid programmes (especially the longer-term impacts and the specific contribution of different components of aid), especially in the UK. Investing in uncovering the specific contributions of the different types of support to students and to the longer-term impacts (even if indirect) will make a valuable contribution to the sector, especially in the UK.



## Clear and accessible processes are key.

To support the achievement of outcomes of student aid programmes, the selection criteria and application processes need to be easy to understand and navigate for students who need them the most. This supports the decision-making process for students, and their understanding of eligibility determination. Complex and/or unclear processes can act as a barrier for student to access aid and thus to access higher education. Building awareness of student aid programmes, especially for those from low-income backgrounds who attend schools that provide less information on Higher Education, can also be important.



## Non-monetary support plays an important role.

Aid programmes that provide non-monetary support can be particularly beneficial to students. Barriers to higher education are not solely financial, students also face challenges around less tangible but equally significant social, emotional and cultural disadvantage. Programmes such as the Dell Programme and the Carolina Covenant scholarship demonstrate how other support mechanisms such as mentoring, counselling, professional development activities can reduce social and educational divisions.



## Take care of unintended negative consequences.

There are instances of programmes leading to unintended negative outcomes. For example, an evaluation of the Bright Futures scholarship programme based in Florida found a reduction in persistence by 4 percentage points, due to academically weaker students misrepresenting their grades to qualify for aid despite not meeting the requirements, and who then are less likely to persist. The Helping Outstanding Pupils Educationally (HOPE), a US large-scale merit-based programme, has been shown to decrease the number of STEM graduates because of a requirements for students to keep high grades throughout their studies to maintain the scholarship. Students are thus incentivised to enrol in classes that will be easier to maintain high grades (i.e., not STEM classes).

# REFERENCES



# REFERENCES (1 OF 5)

- Asian Development Bank (2022). Asian Development Bank - Japan Scholarship Program Annual Report 2021. Available at: <https://www.adb.org/sites/default/files/institutional-document/816956/adb-jsp-annual-report-2021.pdf>
  - Baines Cutler Solutions (2016). The Leathersellers' Company: Leathersellers' Scholars' Review Report
  - Baines Cutler Solutions (2020). The Leathersellers' Company: Leathersellers' Scholars' Review
  - Better Purpose (2021). Social Mobility Landscape Review: A rapid review of literature on the policy and stakeholder landscape review of improving social mobility through Education in England. Available at: [https://www.betterpurpose.co/files/ugd/6a0d81\\_6d8ad0908c1e4f649b9d82ab9d8fb2af.pdf](https://www.betterpurpose.co/files/ugd/6a0d81_6d8ad0908c1e4f649b9d82ab9d8fb2af.pdf)
  - Bettinger E. (2015). Need-based aid and college persistence: The effects of the Ohio College Opportunity Grant. *Educational Evaluation and Policy Analysis*, 37, (1): 102S-119S. Available at: <https://journals.sagepub.com/doi/10.3102/0162373715576072>
  - [cambridgestudents.cam.ac.uk/cambridge-bursary#:~:text=The%20Bursary%20is%20free%20financial,which%20College%20you're%20at](http://cambridgestudents.cam.ac.uk/cambridge-bursary#:~:text=The%20Bursary%20is%20free%20financial,which%20College%20you're%20at).
  - Carson, T. (2010). Overcoming Student Hardship at Swinburne University, Australia: An insight into the impact of equity scholarships on financially disadvantaged students, *Widening Participation and Lifelong Learning*, 12 (3): 36-59. Available at: <https://www.ingentaconnect.com/content/open/jwpl/2010/00000012/00000003/art00004;jsessionid=1i86ntjkrqlal.x-ic-live-03>
  - Castillo, E., Robinson, J., Denman, K., & Choy, A., & Khraishi, T., (2020). Impact of Scholarships and Academic/Career Development Activities on the Success of Undergraduate Students, *SCIREA Journal of Education*, (5) 18-38. Available at: [\(PDF\) Impact of Scholarships and Academic/Career Development Activities on the Success of Undergraduate Students \(researchgate.net\)](#)
  - CFE Research Edge Hill University, (2014). Evaluation of the National Scholarship Programme, year 3: Report to HEFCE by CFE Research and Edge Hill University, November 2014. Available at: <https://dera.ioe.ac.uk/id/eprint/21388/1/nspevaly3.pdf>
-



## REFERENCES (2 OF 5)

- Clotfelter, C. T., Hemelt, S. W., & Ladd, H. F. (2016). Multifaceted aid for low-income students and college outcomes: Evidence from North Carolina, *National Bureau of Economic Research*. Available at: [https://www.nber.org/system/files/working\\_papers/w22217/w22217.pdf](https://www.nber.org/system/files/working_papers/w22217/w22217.pdf)
  - Colfe's School Development and Alumni Relations (2023). Celebrating Your Support: 5-Year Donor Impact Report. Available at: [https://issuu.com/colfesalumni/docs/colfe\\_s-school\\_5-year-donor-impact-report-2023\\_fin](https://issuu.com/colfesalumni/docs/colfe_s-school_5-year-donor-impact-report-2023_fin)
  - Dearden, L., and Jin, W. M. (2014). The rise and demise of the National Scholarship Programme: implications for university students. Available at: <https://ifs.org.uk/articles/rise-and-demise-national-scholarship-programme-implications-university-students>
  - Harris, D. Farmer-Hinton, R., Kim, D. Diamond, J., Blakely Reavis, T., Rifelj, K., Lustick, H. & Carl, B. (2018). The promise of free college (and its potential pitfalls), *Brookings*. Available at: [https://www.brookings.edu/wp-content/uploads/2018/09/gs\\_9202018\\_free-college.pdf](https://www.brookings.edu/wp-content/uploads/2018/09/gs_9202018_free-college.pdf)
  - Henry, G. T., Rubenstein, R. and Bugler, D. T. (2004). Is HOPE Enough? Impacts of Receiving and Losing Merit-Based Financial Aid, *Educational Policy*, (18), 686-709. Available at: [https://www.researchgate.net/publication/249680851\\_Is\\_HOPE\\_Enough\\_Impacts\\_of\\_Receiving\\_and\\_Losing\\_Merit-Based\\_Financial\\_Aid](https://www.researchgate.net/publication/249680851_Is_HOPE_Enough_Impacts_of_Receiving_and_Losing_Merit-Based_Financial_Aid)
  - Joshua, A., Autor, D., Hudson, S. and Pallais, A. (2014). Leveling Up: Early Results from a Randomized Evaluation of Post-Secondary Aid. *National Bureau of Economic Research*. Available at: [https://www.nber.org/system/files/working\\_papers/w20800/w20800.pdf](https://www.nber.org/system/files/working_papers/w20800/w20800.pdf)
  - Kaye, N. (2020). Evaluating the role of bursaries in widening participation in higher education: a review of the literature and evidence. Available at: [https://discovery.ucl.ac.uk/id/eprint/10109923/3/Kaye\\_Evaluating%20the%20role%20of%20bursaries%20in%20widening%20participation%20in%20higher%20education-%20a%20review%20of%20the%20literature%20and%20evidence\\_AAM.pdf](https://discovery.ucl.ac.uk/id/eprint/10109923/3/Kaye_Evaluating%20the%20role%20of%20bursaries%20in%20widening%20participation%20in%20higher%20education-%20a%20review%20of%20the%20literature%20and%20evidence_AAM.pdf)
  - [kcl.ac.uk](https://www.kcl.ac.uk)
-



## REFERENCES (3 OF 5)

- [lancingcollege.co.uk](http://lancingcollege.co.uk)
  - LaSota, R. R., Polanin, J. R., Perna, L. W., Austin, M. J., Steingut, R. R., & Rodgers, M. A. (2022). The Effects of Losing Postsecondary Student Grant Aid: Results From a Systematic Review. *Educational Researcher*, 51(2), 160–168. Available at: <https://journals.sagepub.com/doi/abs/10.3102/0013189X211056868>
  - Latief, R. and Lefen, L. (2018) Analysis of Chinese Government Scholarship for International Students Using Analytical Hierarchy Process (AHP). *Sustainability* 10(7). Available at: <https://www.mdpi.com/2071-1050/10/7/2112>
  - [leathersellers.co.uk/leather-student-grants/](http://leathersellers.co.uk/leather-student-grants/)
  - [marquette.edu/central/financial-aid/grants/undergraduate-pell.php](http://marquette.edu/central/financial-aid/grants/undergraduate-pell.php)
  - Mattana, E. (2018). Literature Review on Financial Aid to University Students. Available at: [literaturereview.pdf \(dors.dk\)](#)
  - Murphy, R. and Wyness, G. (2015) Testing means-tested aid. CEP Discussion Paper (1396). *Centre for Economic Performance*. Available at: <http://eprints.lse.ac.uk/66060/7/dp1396.pdf>
  - Myers, C., Brown, D., & Pavel, M. (2010). Increasing Access to Higher Education Among Low-Income Students: The Washington State Achievers Program. *Journal of Education for Students Placed at Risk*. (15), 299-321. Available at: <https://eric.ed.gov/?id=EJ908783>
  - Nguyen, T. D., Kramer, J. W., & Evans, B. J. (2019). The Effects of Grant Aid on Student Persistence and Degree Attainment: A Systematic Review and Meta-Analysis of the Causal Evidence. *Review of Educational Research*, 89(6), 831–874. Available at: <https://journals.sagepub.com/doi/abs/10.3102/0034654319877156>
  - [officeforstudents.org.uk/news-blog-and-events/press-and-media/students-from-disadvantaged-backgrounds-less-likely-to-complete-their-course/](http://officeforstudents.org.uk/news-blog-and-events/press-and-media/students-from-disadvantaged-backgrounds-less-likely-to-complete-their-course/)
-



## REFERENCES (4 OF 5)

- [officeforstudents.org.uk/publications/schools-attainment-and-the-role-of-higher-education/](https://officeforstudents.org.uk/publications/schools-attainment-and-the-role-of-higher-education/)
- Ohio College Opportunity Grant (n.d.) Programme overview. Available at: <https://careernavigator.chrr.ohio-state.edu/sites/default/files/prog-overview/ocog.pdf>
- [ox.ac.uk/admissions/undergraduate/student-life/help-with-the-cost/crankstart-scholarships](https://ox.ac.uk/admissions/undergraduate/student-life/help-with-the-cost/crankstart-scholarships)
- Page, L. Kehoe, S. Castleman, B. and Sahedewo, G. (2017). More than dollars for scholars: The impact of the Dell Scholars Program on College Access, Persistence and Degree Attainment. Available at: [https://www.dell.org/wp-content/uploads/2020/04/msdf-dsp-exec-summary\\_FINAL.pdf](https://www.dell.org/wp-content/uploads/2020/04/msdf-dsp-exec-summary_FINAL.pdf)
- Pluhta, E. A., & Penny, G. R. (2013). The Effect of a Community College Promise Scholarship on Access and Success. *Community College Journal of Research and Practice*, 37(10), 723–734. Available at: <https://eric.ed.gov/?id=EJ1021931>
- [possefoundation.org/recruiting-students/the-nomination-process](https://possefoundation.org/recruiting-students/the-nomination-process)
- Reed, R. J., & Hurd, B. (2016). A value beyond money? Assessing the impact of equity scholarships: from access to success. *Studies in Higher Education*, 41(7), 1236-1250. Available at: <https://www.tandfonline.com/doi/abs/10.1080/03075079.2014.968541>
- Robinson, D. and Salvestrini, V. (2020). The impact of interventions for widening access to higher education: A review of evidence. *Education Policy Institute*. Available at: [https://epi.org.uk/wp-content/uploads/2020/01/Widening\\_participation-review\\_EPI-TASO\\_2020.pdf](https://epi.org.uk/wp-content/uploads/2020/01/Widening_participation-review_EPI-TASO_2020.pdf)
- Scott-Clayton, J. (2011). On Money and Motivation: A Quasi-Experimental Analysis of Financial Incentives for College Achievement, *Journal of Human Resources*, 46(3), 614-646. Available: <https://www.jstor.org/stable/41304834>
- Scrivener, S., Weiss, M., Ratledge, A., Rudd, T., Sommo, C., & Fresques, H. (2015) Doubling Graduation Rates: Three-Year Effects of CUNY's Accelerated Study in Associate Programs (ASAP) for Developmental Education Students. Available at: [https://papers.ssrn.com/sol3/papers.cfm?abstract\\_id=2571456](https://papers.ssrn.com/sol3/papers.cfm?abstract_id=2571456)





# REFERENCES (5 OF 5)

- [selbyfdn.org/a-peek-inside-our-scholarship-selection-process/](https://selbyfdn.org/a-peek-inside-our-scholarship-selection-process/)
- [self-service.kcl.ac.uk/article/KA-01966/en-us#:~:text=If%20you%20receive%20the%20King's,off%20payment%20of%20%C2%A3160.](https://self-service.kcl.ac.uk/article/KA-01966/en-us#:~:text=If%20you%20receive%20the%20King's,off%20payment%20of%20%C2%A3160.)
- The Cape Cod Foundation (2023). Impact: Annual Report. Available at: <https://ccfoundation.wpenginepowered.com/wp-content/uploads/2023/07/2022-ANNUAL-REPORT-FINAL-WEB-VERSION.pdf>
- The Greater Kanawha Valley Foundation (2018), Understanding our impact: Scholarship program evaluation. Available at: <https://tgkvf.org/wp-content/uploads/2018/09/TGKVF-Scholarship-Impact-Report-WEB.pdf>
- The Sutton Trust. (2021). Universities and Social Mobility. Available at: <https://www.suttontrust.com/wp-content/uploads/2021/11/Universities-and-social-mobility-final-summary.pdf>
- Thorndill, S. (2001) Washington Education Foundation Partners with Bill & Melinda Gates Foundation on School Reform and Scholarship Program. Available at: <https://www.gatesfoundation.org/Ideas/Media-Center/Press-Releases/2001/01/New-Washington-State-Achievers-Program>
- [ucl.ac.uk](https://ucl.ac.uk)
- [undergraduate.study.cam.ac.uk/financial-support-and-cost-effective-living](https://undergraduate.study.cam.ac.uk/financial-support-and-cost-effective-living)
- [universityofcalifornia.edu](https://universityofcalifornia.edu)
- Younger, K., Gascoine, L., Menzies, V., & Torgerson, C. (2019). A systematic review of evidence on the effectiveness of interventions and strategies for widening participation in higher education. Journal of Further and Higher Education. Available at: <https://dro.dur.ac.uk/23935/1/23935.pdf>

# APPENDICES



# APPENDIX 1: THE RESEARCH PROCESS WAS UNDERPINNED BY A RESEARCH FRAMEWORK, DESK RESEARCH AND REVIEW

Better Purpose and the Leathersellers' Company collaboratively designed the research framework to inform the process underpinning this study. This include the design of the key research questions this report is seeking to answer, core research terms and comparable countries in scope for the research.

Research questions	Research scope	Research method
<p><b>For existing or previous financial aid programs...</b></p> <ol style="list-style-type: none"><li>1. What is the scope?</li><li>2. What is the reach?</li><li>3. What is the selection criteria?</li><li>4. What are the metrics used to measure success?</li><li>5. What are the intended outcomes in the short, medium and long-term?</li><li>6. What are the achieved outcomes in the short, medium and long-term?</li><li>7. What are the impacts on families, schools and communities?</li></ol>	<p>The stages of education considered are Sixth Form (or equivalent), undergraduate and graduate years.</p> <p>The geographical scope of research included is both the UK- and international-based financial aid programmes. The research explores programmes more broadly than the UK for two key purposes:</p> <ol style="list-style-type: none"><li>1. There is a lack of research that analyses the impact of UK financial aid programmes as revealed.</li><li>2. There are relevant and applicable practice in comparable contexts in measuring impact.</li></ol> <p>The criteria to identify comparable contexts included the following criteria:</p> <ol style="list-style-type: none"><li>1. Comparable tuition</li><li>2. Increase in school/ university fees within the last 20 years, generating demand for financial aid</li></ol> <p>Countries included within scope in addition to the UK are Australia, China, Japan, New Zealand, Singapore and the United States.</p>	<p>This report is based on a rapid review of publicly available information. Due to the nature of the report, the approach leveraged a combination of meta-analysis/systematic reviews and key studies of individual programmes.</p> <p>The benefit of this approach is that meta-analysis and systematic reviews synthesise the results of multiple studies and reduce bias. This supported to be able to explore impacts on a larger scale more efficiently.</p> <p>Programmes outlined in meta-analysis and systematic reviews that had robust and/or interesting findings were extracted and reviewed in greater detail.</p>



# APPENDIX 2: OVERVIEW OF STUDENT AID PROGRAMMES WITHIN THE 3 RIGOROUS REVIEWS OF EVIDENCE (1 OF 6)

Programme	Country	Target			Scope			Total reach			Eligibility			Outcomes / Impact
		6 <sup>th</sup> form	Undergraduate	Graduate	Tuition support	Other monetary support	Non-monetary support	0-100 students	101-1000 students	1001+ students	Need based	Merit based	Need-Merit based	
16 to 19 Bursary Fund	UK	✓				✓				✓*	✓			<ul style="list-style-type: none"> <li>Of the providers surveyed, 83% agreed the Fund had a positive impact on post-16 participation, 75% agreed the Fund had a positive impact on engagement (attendance, punctuality and ability to fully participate in courses) and 80% agreed that the Fund was effective at targeting learners who face the greatest financial disadvantage.</li> <li>28% of students surveyed stated that they would not have not been able to stay in education if they did not receive the support.</li> <li>9% of young people who did not receive the bursary stated they were at risk of dropping out of education due to affordability concerns.</li> </ul>
Accelerated Study in Associate Programs (ASAP)	USA		✓		✓	✓	✓			✓			✓	<ul style="list-style-type: none"> <li>Recipients demonstrated increased persistence, credit accumulation, and graduation – with 40% of the treatment group attaining a degree within three years compared to 22% of the control group.</li> </ul>
Asian Development Bank (ADB)–Japan Scholarship Program (JSP)	Japan			✓	✓	✓				✓		✓		<ul style="list-style-type: none"> <li>The program has awarded 4,154 mid-career professionals from 37 developing member countries with graduate studies scholarships at 25 well-known universities in the region.</li> <li>After their studies, scholars are expected to return to their home countries to apply and share their new knowledge and skills to promote socioeconomic development.</li> <li>The ADB–JSP also facilitates capacity building in DMCs with the innovation, knowledge, and technology needed to compete in a rapidly changing global community.</li> </ul>

\* denotes an estimation of reach based on nature of programme (e.g., national, region specific, cohort specific etc.) and further research (e.g., the total amount of financial assistance awarded, when the scholarships began etc.)



# APPENDIX 2: OVERVIEW OF STUDENT AID PROGRAMMES WITHIN THE 3 RIGOROUS REVIEWS OF EVIDENCE (2 OF 6)

Programme	Country	Target			Scope			Total reach			Eligibility			Outcomes / Impact
		6 <sup>th</sup> form	Undergraduate	Graduate	Tuition support	Other monetary support	Non-monetary support	0-100 students	101-1000 students	1001+ students	Need based	Merit based	Need-Merit based	
Cambridge University Bursary Scheme	UK		✓		✓	✓				✓	✓			<ul style="list-style-type: none"> <li>Impact not publicly documented.</li> </ul>
Cape Cod Foundation Scholarship	USA		✓		✓					✓*	✓	✓	✓	<ul style="list-style-type: none"> <li>In the process of conducting robust programme evaluation. Evaluation will collect demographic data &amp; success rates, identify barriers in applying for scholarships &amp; college completion, identify gaps in scholarship support for the cape &amp; islands community and understand students' needs for wraparound support.</li> </ul>
Chinese Government Scholarship	China		✓		✓	✓				✓		✓		<ul style="list-style-type: none"> <li>From the viewpoint of student respondents, most can cover their daily expenses using the scholarship funding, such as recreational expenses, utility bills, food, and others. The results also highlighted that most of the respondents were satisfied with their study in China in terms of teaching methodology, curriculum, laboratory equipment, and study room.</li> </ul>
Colfe's Independent School: Leathersellers' Scholarship Programme <sup>1</sup>	UK	✓			✓				✓				✓	<ul style="list-style-type: none"> <li>Between 2015 and 2020, top 10 Leathersellers scholarship recipients went on to Russell Group universities, with 4 who went onto Oxbridge.</li> <li>More broadly, 1/3 of Leathersellers scholarship recipients achieved top quartile A-Level results.</li> <li>However, 19 students have ranked in the bottom 2 percentiles.</li> </ul>
Helping Outstanding Pupils Educationally (HOPE)	USA		✓		✓					✓		✓		<ul style="list-style-type: none"> <li>HOPE scholarship recipients achieved slightly higher-grade point averages and were more likely to have graduated after 4 years of college.</li> <li>However, some evidence suggest that it reduced the likelihood that a young person earned a degree in a STEM field by 12.6%.</li> </ul>

\* denotes an estimation of reach based on nature of programme (e.g., national, region specific, cohort specific etc.) and further research (e.g., the total amount of financial assistance awarded, when the scholarships began etc.)

<sup>1</sup> **Note:** This programme was not part of the rigorous reviews of evidence but is included in this overview as it is particularly relevant to the Leathersellers' work.



# APPENDIX 2: OVERVIEW OF STUDENT AID PROGRAMMES WITHIN THE 3 RIGOROUS REVIEWS OF EVIDENCE (3 OF 6)

Programme	Country	Target			Scope			Total reach			Eligibility			Outcomes / Impact
		6 <sup>th</sup> form	Undergraduate	Graduate	Tuition support	Other monetary support	Non-monetary support	0-100 students	101-1000 students	1001+ students	Need based	Merit based	Need-Merit based	
King's Living Bursary	UK		✓			✓			✓*		✓			<ul style="list-style-type: none"> <li>Impact not publicly documented.</li> </ul>
Lancing College	UK	✓			✓	✓		✓					✓	<ul style="list-style-type: none"> <li>All recipients of the bursary have progressed to university.*</li> </ul>
Macquarie University scholarship (See Appendix 3)	Australia		✓		✓	✓	✓			✓	✓			<ul style="list-style-type: none"> <li>Positive impact on retention rates with scholarship students demonstrating 90.6 % retention compared to 84.1% compared to non-recipients.</li> <li>All students interviews stated that the scholarship allowed them to have a better work and study balance.</li> <li>A significant number of students interviewed stated that the scholarship supported with better grades, sense of belonging, increased motivation to work hard, increased motivation to engage in civic engagement.</li> </ul>
National Scholarship Programme (NSP) (See Appendix 3)	UK		✓		✓	✓	✓			✓	✓			<ul style="list-style-type: none"> <li>Views from NSP recipients are generally positive. 78% of students agreed they were able to participate more in university/college life and 79% agreed they were more likely to complete their studies.</li> <li>33% of institutions agree that the NSP helps to improve achievement rates, but many stated it was too soon to tell by time of evaluation.</li> <li>When analysing the effect of the programme compared to those who only received fee waivers, in 4/5 categories, results were more positive from those who received additional monetary support.</li> </ul>
Ohio College Opportunity Grant (OCOG)	USA		✓		✓					✓	✓			<ul style="list-style-type: none"> <li>Student drop-out rates fell by 2% as a result of the program.</li> <li>The new program also increased the likelihood that students attend 4-year campuses and increased their first-year grade point averages.</li> </ul>

\* denotes an estimation of reach based on nature of programme (e.g., national, region specific, cohort specific etc.) and further research (e.g., the total amount of financial assistance awarded, when the scholarships began etc.)



# APPENDIX 2: OVERVIEW OF STUDENT AID PROGRAMMES WITHIN THE 3 RIGOROUS REVIEWS OF EVIDENCE (4 OF 6)

Programme	Country	Target			Scope			Total reach			Eligibility			Outcomes / Impact
		6 <sup>th</sup> form	Undergraduate	Graduate	Tuition support	Other monetary support	Non-monetary support	0-100 students	101-1000 students	1001+ students	Need based	Merit based	Need-Merit based	
<b>Oxford University Crankstart Scholarship</b>	<b>UK</b>		✓		✓	✓	✓			✓	✓			<ul style="list-style-type: none"> <li>Impact not publicly documented.</li> </ul>
<b>Pell Grant (See Appendix 3)</b>	<b>USA</b>		✓		✓	✓	✓			✓	✓			<ul style="list-style-type: none"> <li>Pell Grant evaluations have shown mixed results. Studies by Hansen (1983) and Kane (1995) found no evidence of increased enrolments of recipients compared to non-recipients.</li> <li>In contrast, a study by Seftor and Turner (2002) found increased enrolment rates for adult students (22-35 years old). Bettinger (2004) and Denning (2016) found increased persistence and acceleration in graduation conditional on enrolment.</li> </ul>
<b>Scholarships in Science, Technology, Engineering, and Mathematics (S-STEM)</b>	<b>USA</b>		✓		✓	✓	✓	✓					✓	<ul style="list-style-type: none"> <li>Retention rate of 92% and graduation rate of 73%.</li> <li>Nearly all of those who graduated reported that they either obtained a job in a STEM field (19%), intend to pursue some form of further education in STEM after graduating (46%), or both (30%).</li> </ul>
<b>Susan Thompson Buffett Foundation (STBF)</b>	<b>USA</b>		✓		✓	✓				✓			✓	<ul style="list-style-type: none"> <li>Increased probability of enrolment for first year of college by 2 percentage points however, more substantial gains at the sophomore year by 7.2 percentage points.</li> <li>Equalised enrolment and persistence rates between student groups with expected low persistence with their traditionally-college bound peers.</li> </ul>

\* denotes an estimation of reach based on nature of programme (e.g., national, region specific, cohort specific etc.) and further research (e.g., the total amount of financial assistance awarded, when the scholarships began etc.)



# APPENDIX 2: OVERVIEW OF STUDENT AID PROGRAMMES WITHIN THE 3 RIGOROUS REVIEWS OF EVIDENCE (5 OF 6)

Programme	Country	Target			Scope			Total reach			Eligibility			Outcomes / Impact
		6 <sup>th</sup> form	Undergraduate	Graduate	Tuition support	Other monetary support	Non-monetary support	0-100 students	101-1000 students	1001+ students	Need based	Merit based	Need-Merit based	
<b>Swinburne University Equity scholarship</b>	<b>Australia</b>		✓		✓	✓		✓*			✓			<ul style="list-style-type: none"> <li>Supported with persistence. Before receiving the grant 57.7% of students considered deferring or discontinuing their course. This reduced to 3.8% after receiving the scholarship.</li> <li>2/3 of students reported that the most significant benefit of the programme was financial security and improved quality of life.</li> </ul>
<b>The Carolina Covenant</b>	<b>USA</b>		✓		✓					✓	✓			<ul style="list-style-type: none"> <li>Found that there was little/no improvement in postsecondary progress, performance or completion. However, when increasing the portion of non-monetary aid, this improved GPA scores and were more likely to meet credit accumulation benchmarks toward timely graduation.</li> </ul>
<b>The Degree Project</b>	<b>USA</b>		✓		✓					✓			✓	<ul style="list-style-type: none"> <li>Students had increased interest in other scholarship programmes.</li> <li>Positive effects on raising college expectations raising the percentage of seniors planning to attend college from 68% to 72%.</li> </ul>
<b>The Dell Programme</b>	<b>USA</b>		✓		✓	✓	✓			✓			✓	<ul style="list-style-type: none"> <li>Positive outcomes of the scholarship programme when evaluated against a control group.</li> <li>Dell Scholars are 23% more likely to earn a bachelor's degree within 4 years.</li> <li>Dell Scholars earn a higher GPA.</li> <li>Dell Scholars are more financially well placed after college and are 63% less likely to take on private loans.</li> </ul>

\* denotes an estimation of reach based on nature of programme (e.g., national, region specific, cohort specific etc.) and further research (e.g., the total amount of financial assistance awarded, when the scholarships began etc.)





# APPENDIX 2: OVERVIEW OF STUDENT AID PROGRAMMES WITHIN THE 3 RIGOROUS REVIEWS OF EVIDENCE (6 OF 6)

Programme	Country	Target			Scope			Total reach			Eligibility			Outcomes / Impact
		6 <sup>th</sup> form	Undergraduate	Graduate	Tuition support	Other monetary support	Non-monetary support	0-100 students	101-1000 students	1001+ students	Need based	Merit based	Need-Merit based	
The Greater Kanawha Valley Foundation scholarship	USA		✓		✓					✓	✓		<ul style="list-style-type: none"> <li>Scholarship supported with enrolment with 25% of students stating they would not have been able to attend without the scholarship.</li> <li>Scholarship supported with achieving high grades with recipients attaining a 3.7 GPA average compared to national average of 3.1 GPA.</li> <li>Scholarship supported with higher graduation rates of 96% compared to 59% national average.</li> <li>Scholarship supported with less debt upon graduation with approximately 50% less than the national average.</li> <li>Scholarship supported with higher income after graduation with 20% higher income than their counterparts.</li> </ul>	
University College London Bursary	UK		✓		✓	✓				✓*	✓		<ul style="list-style-type: none"> <li>Impact not publicly documented.</li> </ul>	
Washington State Achievers Programme	USA		✓		✓	✓				✓		✓	<ul style="list-style-type: none"> <li>Financial aid recipients were 218% more likely to attend a highly selective institution than a moderately selective one when compared to non-recipients.</li> </ul>	
West Virginia University scholarship	USA		✓		✓					✓*	✓		<ul style="list-style-type: none"> <li>No impact on enrolment or persistence at university.</li> <li>Recipients were 9.5 percentage points more likely to have completed 120 credits after four years.</li> <li>Four-year BA completion rates rise by 9.4 percentage points from a baseline of just 16 percent (more than a 50 percent increase).</li> </ul>	
William G. & Marie Selby Foundation	USA		✓		✓		✓			✓*		✓	<ul style="list-style-type: none"> <li>Impact not publicly documented.</li> </ul>	

\* denotes an estimation of reach based on nature of programme (e.g., national, region specific, cohort specific etc.) and further research (e.g., the total amount of financial assistance awarded, when the scholarships began etc.)



# APPENDIX 3: CASE STUDY EXAMPLE | PELL GRANT

### Education level:

- 6<sup>th</sup> form
- Undergraduate**
- Graduate

### Type of aid programme

- Need**
- Merit
- Need-Merit

### Mechanism:

- Basic monetary**
- Additional monetary
- Non-monetary

### Overview:

The Pell Grant is a form of need-based federal financial aid awarded by the U.S. Department of Education to help eligible low-income students pay for college costs, including tuition, fees, room and board, and other educational expenses. It is the largest financial aid grant in the US and has supported over 211.8 million people to date.

### Impact achieved:

- Pell Grant evaluations have shown mixed results. Studies by Hansen (1983) and Kane (1995) found no evidence of increased enrolments of recipients compared to non-recipients.
- In contrast, a study by Seftor and Turner (2002) found an increased enrolment rates for adult students (22-35 years old). Bettinger (2004) and Denning (2016) found increase persistence and acceleration in graduation conditional on enrolment.

### Testimonials:

*“If it wasn't for the Pell Grant, I don't think that I would be here, point blank. Coming from a low-income family and having to support my elderly parents, college would not have been an option if it were not for the financial support I received through the Pell Grant. Granted, it was not the most comprehensive financial support, but it was something that made the difference between being stuck in a cycle of poverty and violent neighbourhoods, and taking the chance to go to college and get an education.”* – **Eli Martinez, UC Berkley student**

*“As a low-income, first-generation college student, the Pell Grant helped cover some of the costs associated with attending UCLA. The culmination of housing, a meal plan, health insurance, fees and tuition costs made me hesitant to attend a four-year university after high school.”* – **Iris Hinh, University of California student**

*“I am a maximum Pell grant recipient first-generation college graduate. I am one of many success stories out there.”* - **Michael Dannenberg, Director Of Higher Education And Education Finance Policy, The Education Trust**

**Country:** USA 

**Funder:** U.S. Department of Education



# APPENDIX 3: CASE STUDY 2 | NATIONAL SCHOLARSHIP PROGRAMME

## Education level:

6<sup>th</sup> form

Undergraduate

Graduate

## Type of aid programme

Need

Merit

Need-Merit

## Mechanism:

Basic monetary

Additional monetary

Non-monetary

### Overview:

The National Scholarship Programme (NSP) was a flagship financial aid programme in the UK. The Programme was aimed at students from disadvantaged backgrounds and provided students fee waivers, cash awards, subsidised/free accommodation, subsidised learning materials and/or travel allowance.

### Impact achieved:

- Views from NSP recipients are generally positive.
- 78% of students agreed that they were more able to participate more in university/college life.
- 79% of students agreed they were more likely to complete their studies.
- Mixed perspective on achievement and success with 33% of institutions agreeing the NSP helps to improve achievement rates,
- When analysing the effect of the programme compared to those who *only* received fee waivers, in 4/5 categories, results were more positive from those who received additional monetary support.

### Testimonials:

*“I was like, ‘Oh my God, £9,000 fee a year and then living costs!’ So it was very shocking, actually, to see the reality. It certainly helped knowing that there’s the opportunity to get a scholarship, and then there’s the opportunity to have a tuition fee loan. So that really helped, having those options.”* – **Student at selective institution**

*“You say to yourself, ‘If you’re studying and you get a bit of help like this, why don’t you go on? There are other people who don’t have this help.’ So it’s motivation for you. There are people who don’t have this opportunity, who don’t receive this help. So you say to yourself, ‘Goodness me, £3,000 off my tuition fee, and I’m getting money to spend on my books.’”* – **Student at selective institution**

*“I think increased confidence and less distraction because of anxiety is bound to lead to a better performance. [...] My academic background is in sports psychology; I can tell you quite categorically that higher and better confidence is going to lead to better performance, there’s no question about that whatever the domain, whether it’s academic or sport or anything else.”* – **Institution**

Country: UK 

Funder: UK Government



# APPENDIX 3: CASE STUDY 3 | MACQUARIE UNIVERSITY

### Education level:

- 6<sup>th</sup> form
- Undergraduate**
- Graduate

### Type of aid programme

- Need**
- Merit
- Need-Merit

### Mechanism:

- Basic monetary**
- Additional monetary
- Non-monetary

### Overview:

The Macquarie University in Sydney Australia provides need-based scholarships to students from disadvantaged backgrounds. The value of each scholarship varies, ranging from one-off payments intended as a contribution to educational costs, to larger awards intended for students relocating from rural areas covering the costs of accommodation in purpose-built student accommodation on the university campus.

### Impact achieved:

- Positive impact on retention rates with scholarship students demonstrating 90.6 % retention compared to 84.1% compared to non-recipients.
- All students interviews stated that the scholarship allowed them to have a better work and study balance.
- A significant number of students interviewed stated that the scholarship supported with better grades, sense of belonging, increased motivation to work hard, increased motivation to engage in civic engagement.

### Testimonials:

*“The scholarship gave me that push. It made me stronger in character, and I think now that I know I can do things for myself I’m less scared. Before I had more doubt, thinking I can’t do it [i.e. moving away from home], but now I don’t have that doubt any more, I know I can do it now”* - **Student at Macquarie University**

*“The help I received made me focus more on giving back to the community. I probably entered university feeling a bit more selfish than I do now, now I’m thinking about how my future job will help benefit society.”* - **Student at Macquarie University**

*“It’s given me a sense of security. Because of my background having a sense of security takes a lot of stress off. The sense of security doesn’t only help in a financial sense, it’s also an emotional sense of stability as well knowing that I’m going to be okay if something happens to me, or if I have to pay for something. It’s one less stress so you can focus more on your degree. I don’t really use it unless I have to, but it’s still there and I know it is there so it really relieves the stress.”*  
**Student at Macquarie University**

**Country:** Australia 

**Funder:** Macquarie University

Better Purpose is an education-focused consultancy that shapes and accelerates the work of organisations that want to make a difference to education outcomes all over the world. Better Purpose provides support with strategy, policy and the design and delivery of education initiatives.

[www.betterpurpose.co](http://www.betterpurpose.co)

