

March 2009/02

**This document gives the outcomes of
OFFA's annual monitoring of access
agreements for 2007-08.**

Access agreement monitoring

Outcomes for 2007-08

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Foreword

I am really pleased to be able to present such an encouraging set of figures following our second year of monitoring access agreements.

Higher education institutions have spent a quarter of their additional fee income on access measures including £192 million on bursaries and scholarships for lower income students. This is a remarkable achievement and demonstrates the continued commitment by the sector to making sure that no student is deterred from higher education on financial grounds.



Following a recommendation from the Innovation, Universities, and Skills Select Committee to provide more detail on who benefited, we can also report this year that more than 70 per cent of the money spent by universities and colleges on financial support went to the very lowest income group, helping almost 133,000 students with a household income of less than £17,910.

Overall, more than 205,000 students from lower income and other under-represented groups received a bursary or scholarship – an excellent result.

Our report also demonstrates that following some teething problems in the first year of access agreements, universities and colleges have increased their efforts around bursary take-up. As a result, bursary take-up has now improved significantly. We estimate that the number of students failing to claim their bursary has almost halved from an estimate of 12,000 students in the lowest income group in 2006-07 to 6,500 per student intake in 2007-08. What's more, take-up will improve still further in 2008-09 following changes to the student finance application form. However, we are not complacent – we have commissioned a good practice review to assist institutions to raise awareness of bursaries at key decision making stages. In addition, where take-up has been below average we have asked institutions to review their own marketing activities.

As in 2006-07, bursary support varies from one institution to another, both in the proportion of additional fee income spent on bursaries and scholarships, and in the size of bursaries awarded to students. Some feel that this variance is unfair and have called for a national bursary scheme to be introduced. However, our view is that national financial support for lower income students already exists in the form of Government grants and loans, and the minimum bursary (£305 in 2007-08). We believe it is absolutely right that, over and above this threshold, institutions should be free to make their own decisions regarding the financial support they offer to lower income students and others. The fact is that over half of institutions spend more than 20 per cent of their additional fee income on bursaries and scholarships,

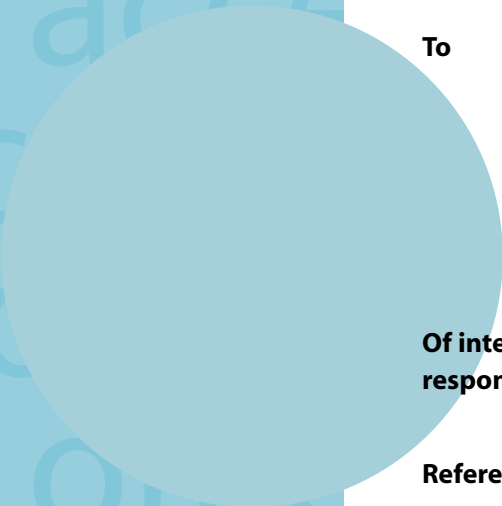
with the lowest income students receiving a typical bursary of £1,000 a year. This is a far greater investment in bursary support than would be achievable under a national scheme.

In conclusion, our second round of monitoring demonstrates the considerable efforts that institutions are making to ensure that all eligible young people can access higher education regardless of their financial circumstances. However, our report does not tell the full story of what institutions are doing to widen participation. This is because access agreements focus on financial support and only cover additional outreach expenditure introduced since the introduction of higher fees. For this reason, next year will see a change to our reporting with the establishment of the new Widening Participation Strategic Assessments to which access agreements will be annexed. The documents will be closely related and joint reporting against strategic assessments and access agreements will allow institutions to demonstrate more fully their widening participation commitments and activities. We hope it will prove a valuable development tool for the sector, helping all of us concerned with widening participation in the ongoing challenge to create diverse student bodies that fully represent the nation's talent.



Sir Martin Harris
Director of Fair Access

Access agreement monitoring outcomes for 2007-08



To	Heads of higher education institutions in England Heads of HEFCE-funded further education colleges Managers of higher education in school centred initial teacher training providers
Of interest to those responsible for	Implementation of access agreements, Widening Participation, Finance
Reference	2009/02
Publication date	March 2009
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Executive summary

1. As a regulator, the Office for Fair Access (OFFA) has a responsibility to ensure that universities and colleges are meeting their commitments to individual students and are moving towards the milestones and legal obligations set out in their access agreements.
2. This report gives an overview of the progress made in 2007-08 – the second year of operation under the new student finance arrangements. It is based on the response from institutions to our monitoring requirements – set out in the document 'Access agreement monitoring 2007-08' (OFFA 2008/03). Covering expenditure on bursaries and scholarships for lower income students, the number of bursary holders at each institution, and expenditure on additional outreach, it demonstrates that the higher education (HE) sector is meeting its obligations and that progress is being made to promote and safeguard fair access to HE for under-represented groups.

3. Key findings include:-

- higher education institutions (HEIs) spent almost £192 million on bursaries and scholarships for students from lower income and other under-represented groups
- more than 70 per cent of this £192 million was spent on the poorest students ie those with a household income of less than £17,910
- HEIs spent just under £27 million on additional outreach – an increase of £6 million from 2006-07
- in total, HEIs spent 25 per cent of their increased fee income on additional access measures
- more than 205,000 students from lower income or other under-represented groups have received a bursary or scholarship. Almost 133,000 of these students were from the lowest income group
- we estimate that bursary take-up among students from the lowest income group has improved from 80 per cent to 92 per cent.

Background

4. The Office for Fair Access was established under the Higher Education Act 2004. Our role is to safeguard and promote fair access to higher education by regulating the charging of variable tuition fees through the approval and monitoring of access agreements.

5. An access agreement shows the fee limits an institution has established, its plans for bursaries and other financial support for lower income students and other under-represented groups, and, in some cases, additional outreach work. It also sets out the milestones and objectives the institution will use to monitor its progress in improving access.

6. When institutions draw up their access agreements, they are also asked to provide estimates of the additional fee income they expect to receive and their estimated expenditure on access measures.

What our monitoring requirements are

7. There is a legal requirement for institutions with an approved OFFA access agreement to inform us about the extent to which they have met their obligations, and to report on their progress against their objectives and milestones. Full details of our monitoring requirements can be found in the document 'Access agreement monitoring 2007-08' (OFFA 2008/03), which was published in July 2008.

8. We asked institutions to give us data on:-

- additional fee income
- actual expenditure on bursaries and scholarships to students from lower income and other under-represented groups¹
- actual expenditure on any additional outreach activities covered in their access agreement
- the number of lower income students in receipt of a bursary or scholarship and the proportion of the total student body that this represents
- the number of students estimated to be eligible for a bursary.

9. We also asked institutions to give us:-

- an explanation of any significant differences between estimated and actual expenditure
- information about any shortfalls in expenditure reallocated to other widening access measures
- a report on bursary awareness raising activities where there appeared to be a significant difference between the number of eligible students and the number of bursary holders
- a report on their progress against the objectives and milestones they have set themselves.

¹ Throughout this document wherever we use the term lower income student this should be taken to include other under-represented groups as well.

Higher education institutions monitoring

Financial data

Background information

10. We have always been clear that the expenditure levels that institutions set out in access agreements and financial returns are estimates based on assumptions of student profiles and are not firm financial commitments or targets.

11. In the 2006-07 monitoring, because of the absence of other data, we monitored institutions against estimated expenditure. However, because estimated expenditure is not a financial target and because actual expenditure will vary depending on the numbers of students an institution recruits and the profile of these students, we do not think it sensible to monitor against predictions on an ongoing basis. Going forward, we think it is more helpful to compare actual expenditure year on year. Accordingly, from next year, we will monitor against previous levels of expenditure and will not publish amounts of predicted expenditure.

Our findings on expenditure across all higher education institutions

Comparison with 2006-7 income and expenditure

12. **Annex A** shows institutions' overall spend on access measures in 2006-07 and 2007-08. **Annex B** shows the proportions of additional fee income spent on bursaries and scholarships for lower income students in 2006-07 and 2007-08 for each institution.

13. Key findings on overall spend are that:-

- HEIs spent almost £192 million on bursaries and scholarships for lower income students and other under-represented groups in 2007-08
- there is no significant difference between the proportion of fee income spent on bursaries and scholarships between 2006-07 and 2007-08 (see **Table 1**)
- HEIs spent just under £27 million on additional outreach, an increase of £6 million (see **Table 2**).

Table 1: Comparison of 2007-08 with 2006-07 expenditure on bursaries and scholarships for lower income students as a proportion of additional fee income

	2006 %	2007 %	Difference %
HEIs	21.1	21.8	0.7

Table 2: Comparison of 2007-08 with 2006-07 expenditure on additional outreach

	2006 £000	2007 £000	Difference £000
HEIs	20,699	26,975	6,276

Comparison of estimated and actual income and expenditure in 2007-08

14. **Annex C** shows the figures for actual and estimated income and expenditure for the sector. These figures show that overall there is very little difference between predicted and actual expenditure as proportions of additional fee income.

Actual and estimated expenditure on bursaries and scholarships for lower income students

15. **Table 3** shows that overall there is no significant difference between actual and estimated expenditure on bursaries and scholarships for lower income students as a proportion of additional fee income. HEIs estimated that approximately £202 million would be spent on bursaries and scholarships for lower income students, representing 22.6 per cent of additional fee income. The actual figure is almost £192 million which is almost 22 per cent.

Table 3: Expenditure on bursaries and scholarships for lower income students as a proportion of additional fee income 2007-08

	Predicted %	Actual %	Difference %
HEIs	22.6	21.8	0.8

16. HEIs also spent at least a further £7 million on bursaries and scholarships for students who are not in OFFA countable groups².

Actual and estimated expenditure on additional outreach

17. HEIs estimated they would spend just over £27 million on additional outreach under access agreements. The actual figure is just under £27 million. This is additional investment since the introduction of variable fees and does not represent HEIs' total investment in outreach activities or widening participation. Institutions also carry out many other widening participation activities which do not fall under OFFA 'countable' expenditure. However, institutions will be able to include these in their new Widening Participation Strategic Assessments – due to be submitted to the Higher Education Funding Council for England and OFFA by 30 June 2009.

Our findings on bursary and scholarship expenditure for lower income students

18. **Annex D** shows the predicted and actual proportions of additional fee income spent by individual institutions in 2007-08.

19. Key findings on bursary and scholarship expenditure for lower income students (in addition to those outlined above) are that:-

- the proportion of additional fee income that HEIs spent on bursaries and scholarships for lower income groups (and where the minimum bursary requirement applies) ranged from 6 to 48 per cent
- on average, institutions charging the full fee spent 21.5 per cent of their additional fee income on bursary and scholarship expenditure for lower income students. More than half of institutions (63) fall within the 15 to 25 per cent range
- 43 per cent (53 HEIs) spent 100 per cent or more than they predicted

- 32 per cent (39 HEIs) spent between 90 and 99 per cent of their predicted expenditure
- 25 per cent (30 HEIs) spent 89 per cent or below of their predicted expenditure.

Institutions' explanations for the difference between actual and estimated expenditure

20. Following the first monitoring exercise we offered institutions the opportunity to revise their forecasts based on better data from the first year of operation. This and improved take-up of bursaries has resulted in much less variance between predicted and actual expenditure than in 2006-07. Where actual expenditure was more than 10 per cent below the estimate, we asked HEIs to give us an explanation. Only 25 per cent of institutions fell outside this reporting margin.

21. The main reason given by HEIs to account for the differences between estimated and actual expenditure was that some students or sponsors failed to tick the appropriate box on their loan application form giving the Student Loans Company (SLC) permission to share information about their assessed household income with their university or college. The SLC needs this permission either to pay bursaries on behalf of institutions, or share the information so that institutions can pay the bursaries themselves.

22. In some cases, estimates also included an element of scholarship expenditure relating to lower income students based on attainment at entry or progression criteria. Because of the additional criteria attached to such awards it is difficult for institutions to accurately forecast how many of these discretionary awards may be taken up. For example, some HEIs reported fewer students than anticipated meeting the academic standard required for a scholarship.

23. As some institutions met or exceeded their predictions for bursary expenditure without managing full bursary take-up, there appears to be an element of underestimating in some financial forecasts. This is a further reason why comparisons against predictions are not an entirely meaningful measure for monitoring purposes going forward.

² This figure comes from HEBSS data on the expenditure made to students where no income detail was recorded or where income was above £48,330. This information is not requested from institutions not subscribed to the HEBSS full administration service.

24. We are satisfied that institutions have delivered the bursary and scholarship packages agreed with us and we know of no eligible student who applied through the appropriate procedure and failed to receive their bursary entitlement.

The difference between bursary spend at each institution

25. The difference in the proportion of additional fee income that HEIs spend on bursaries is due to the numbers of lower income students at each institution, the size of bursary that students receive and the individual priorities of the institution on widening participation and recruitment– largely based on the current make-up of their student body. For example, institutions who have further to go in widening participation may decide to give more generous bursaries to students than institutions who already have a diverse student body. The ability of institutions to set their own bursary levels enables them to take into account their own individual circumstances and progress in widening participation.

Expenditure on bursaries and scholarships across income groups

26. Following a recommendation from the Innovation, Universities and Skills Select Committee to provide some detail on who was benefiting from bursaries and scholarships, we asked institutions to report on their expenditure by income thresholds so that we could identify how much money they were spending on the lowest income group.

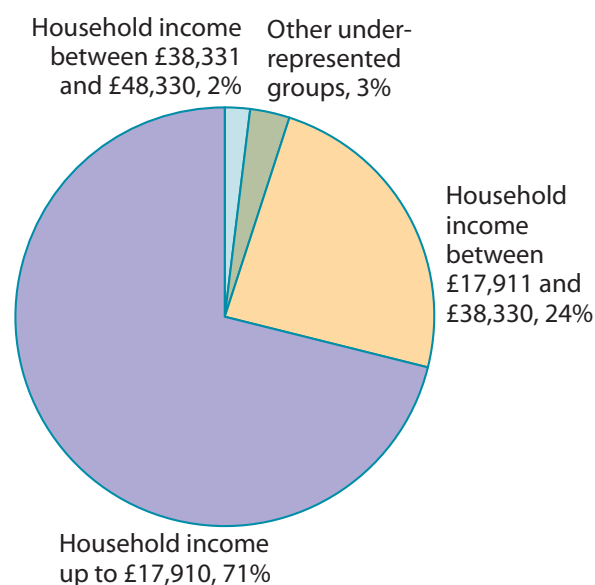
27. **Table 4** shows the amounts spent on students from different income groups.

Table 4: Expenditure on bursaries and scholarships by income group

	£000
Household income up to £17,910	136
Household income between £17,911 and £38,330	47
Household income between £38,331 and £48,330	4
Other under-represented groups	5
Total	192

28. **Chart 1** shows that, of the £192 million spent on OFFA countable awards, 71 per cent is distributed to the lowest income group.

Chart 1: Proportion of OFFA countable expenditure awarded to different income groups



Notes on interpreting the data

29. OFFA was established to ensure that students from lower income and other under-represented groups are not deterred from applying to higher education because of variable fees. For this reason, when we approve access agreements and in all subsequent monitoring we only count expenditure that is directed at our target groups.

30. For our assessment purposes, we define 'lower income' as students with assessed household incomes below £48,330. This is £10,000 above the threshold for state support in recognition that some institutions feel it is important to target and support students who just miss out on state financial support as well as those entitled to state support.

31. We ask institutions to report only on the amount of additional fee income they spend on bursaries and scholarships for students up to this income level and for other under-represented groups. The amount of expenditure reported is therefore not the total amount that the sector spends on bursaries and scholarships – as mentioned in paragraph 16 we know that at least a further £7 million was spent on bursaries or scholarships for students outside of our target groups.

Our conclusions on expenditure on bursaries and scholarships for lower income students

32. We are satisfied that all institutions have met the commitments in their access agreements.

33. Expenditure on financial support broadly matches the proportions estimated by institutions.

34. Expenditure also broadly matches the proportions of fee income spent in 2006-07.

35. Bursary take-up improves but continues to be an issue. This is dealt with later in the report.

- achieving planned levels of activity at a lower than anticipated cost
- reducing the level of expenditure to reflect a lower than expected income or higher than estimated spend on bursaries
- receiving additional funding from other sources meaning it was unnecessary to use all of the proposed outreach budget.

Notes on interpreting the data

39. Some access agreements cover additional outreach work that institutions committed themselves to after the introduction of variable fees. This is not compulsory and there is no expectation that institutions should undertake extra outreach – it is a decision for institutions to make based on the bursary scheme they introduce, their current investment in outreach and how far they have to go in attracting a broader range of applicants. Access agreements do not, therefore, set out the full widening participation activity or total amount an institution invests in this area. Fuller information will be available later this year when institutions report on access agreements as part of their new Widening Participation Strategic Assessment.

40. In Annex D, where an institution has a zero entry, this does not mean they spend nothing on outreach – it means they are either not using additional fee income to invest further in outreach (ie on top of what they are already spending), or have chosen not to include such investment in their access agreement.

Our findings on outreach expenditure

36. Annex D shows the predicted and actual amounts spent on additional outreach. In summary the figures³ for HEIs show that the vast majority of HEIs exceeded or broadly met their expenditure forecasts for outreach. Compared to forecasts:

- 65 per cent (70 HEIs) spent 100 per cent or more than they predicted
- 21 per cent (23 HEIs) spent between 90 and 99 per cent of their predicted expenditure
- 14 per cent (15 HEIs) spent 89 per cent or below of their predicted expenditure.

Institutions' explanations for the difference between actual and estimated expenditure on outreach

37. We asked institutions to give us an explanation where actual expenditure was more than 10 per cent below their estimate. The figures above show that only 14 per cent of institutions fell outside this reporting margin.

38. Where institutions spent less than they forecast on outreach, this was for a variety of reasons:-

- delays in recruiting or replacing staff with knock-on effects for additional activities and expenditure

Our conclusions on expenditure on outreach

41. We are satisfied that even where expenditure has been lower than predicted institutions have achieved, or have made good progress towards, their outreach objectives and have met the commitments in their access agreement.

³ Percentages exclude HEIs that did not estimate additional expenditure on outreach

Bursary holders and numbers of eligible students

Background information

42. In 2006-07 a significant number of students failed to claim their bursary. This was largely due to a data sharing problem related to the Higher Education Bursary and Scholarship Scheme (HEBSS) which the majority of institutions use to administer their bursary scheme. For the process to work, students and/or their sponsors had to tick a box on their student finance application form to allow the SLC to pay their bursary or to share information about the student's assessed household income with their university or college so that they can pay the bursary. We estimated that some 12,000 students may have missed out on a bursary because they did not consent to share their financial information and that the take-up rate across the sector for the lowest income group was around 80 per cent.

43. Having identified this as an issue, we asked HEIs to estimate both the number of students eligible to receive a bursary and their bursary take-up rate.

Our findings on bursary holders

44. **Annex E** shows the number of students in OFFA countable groups who were awarded a bursary or scholarship at each institution, as well as the proportion of the student body this represents. The figures show that:-

- over 205,000 students from lower income or other under-represented groups received a financial award
- almost 133,000 (65 per cent) of these 205,000 students were from the lowest income group
- the percentage of students being awarded financial support at institutions ranges from 9 to 90, with a total across all institutions of 42 per cent⁴

- 78 HEIs (65 per cent) give bursaries and scholarships to approximately a third of their students or more while 37 HEIs (31 per cent) give bursaries to over half their students⁵.

45. HEIs also awarded around 8,000 bursaries or scholarships to students who are not in OFFA countable groups.⁶

Our findings on bursary take-up

46. Institutions have made substantial efforts to promote their bursary schemes and to encourage take-up and there is a large improvement on last year:-

- the bursary take-up rate for students in the lowest income group has increased from around 80 per cent in 2006-07 to around 92 per cent
- the number of students in this income group who may have missed out on a bursary has fallen considerably from around 12,000 across one student intake in 2006-07 to around 6,500 per student intake (13,000 in total across the two intakes).

Bursary take-up going forward

47. The student finance application form for 2008-09 has been changed so that students and sponsors have to tick a box to opt out of sharing their financial information rather than opt in. This will improve the consent to share rates still further. Current data from the SLC suggests that the overall consent rate across all income groups is now at around 95 per cent. Given this high rate, we will not be asking institutions subscribed to HEBSS to report on the number of eligible students in future years, but we will continue to collect data centrally.

⁴ We did not ask institutions to provide the total number of students paying the full fee – only the proportion of their students who received a bursary. We have therefore calculated the total number of students based on the reported percentages.

⁵ Three institutions are excluded from the calculations: The Open University do not have to provide bursaries. Leeds Metropolitan University do provide a small number of bursaries but because a lower fee is charged these are discretionary, small in number and not directly comparable with the data for other institutions. London Metropolitan University have not reported on the percentage of students who receive a bursary as yet, due to some data issues.

⁶ This figure comes from HEBSS data on the number of bursary holders where no income data was provided by the students or where household income was above £48,330. This information is not requested from institutions not subscribed to the HEBSS full administration service.

48. However, the take-up rate at institutions not subscribed to HEBSS is lower with an average of 85 per cent. It is important that these institutions have management systems to allow them to monitor likely student take-up of bursaries. In future, we will continue to ask non-HEBSS institutions to report on how this has been managed.

Notes on interpreting the data

49. We ask institutions to report only on the number of bursary or scholarship holders from lower income or other under-represented groups. The number of bursary or scholarship holders reported is therefore not necessarily the total number of students receiving financial support at an institution. As mentioned in paragraph 45 we know that at least a further 8,000 students outside of our target groups were awarded a bursary or scholarship.

50. The figures for the number of bursary and scholarship holders do not include numbers of students awarded financial support through additional hardship funds established at institutions from their additional fee income.

51. In the course of our monitoring we encountered some problems with the data on the number of students/sponsors who have not consented to share their information which leads us to believe that the numbers of students missing out on bursaries for 2006-07 and 2007-08 may be slightly overstated. The figures should therefore only be seen as indicative⁷.

Our conclusions on bursary take-up

52. All institutions have met their commitments to individual students who applied for a bursary and provided their financial details through the appropriate channels.

53. Following the changes to the student finance application form for 2008, institutions should be able to identify continuing students who did not receive a bursary in the past even though they were eligible to do so. Where there has been a lower than average take-up rate we suggest that institutions should consider making retrospective bursary payments available if they become aware of appropriately eligible individuals.

54. Although changes in the student finance application form will further improve take-up rates, institutions that have considerably lower than average take-up will want to understand why this has been a particular problem. This may lead to institutions reviewing the way they market and publicise their bursaries.

55. Institutions not subscribed to HEBSS will need to ensure they have their own methods for increasing take-up in line with the sector average.

56. While take-up has generally improved, the continued lack of awareness amongst some students highlights once again the importance of clear information about bursaries. If bursaries are to play a role in ensuring applicants are not deterred on financial grounds it is important that all institutions continue to publicise bursary schemes early in the decision making process, both pre and post application.

⁷ The data should be viewed as indicative as it includes some ineligible students where records have not been updated, such as those who have withdrawn or transferred to another institution. Also because the SLC can only provide the number of students who have not consented and not personal data, it is impossible for institutions to identify the exact number of students eligible to receive a bursary. Records from a different data set also show that several institutions have paid more bursaries than the number of their students who consented to share, suggesting a further anomaly. Given the small numbers involved at the margins, the full reconciliation required to resolve the discrepancies between different datasets would have caused an unnecessary and disproportionate burden for institutions and we are therefore happy to live with a margin of error.

Milestones

Background information

57. Institutions set their own milestones and objectives to monitor their progress in improving access so the range of milestones and objectives is extremely varied. The majority (75 per cent) of HEIs use some or all of the Higher Education Statistics Agency's (HESA) published Performance Indicators on widening participation (www.hesa.ac.uk) as part of their milestones. Institutions use HESA data in a variety of ways – some institutions aim to meet the location-adjusted benchmark each year, others aim to improve their performance year on year.

58. A smaller number of institutions rely on application data, the number of students entitled to a maintenance grant or bursary or the number of students from other target under-represented groups. Beyond this, milestones include a diverse range of objectives based on outreach activities or operational functions. For example, many institutions have set themselves objectives such as the timely publicising of bursary schemes.

59. The HESA data for 2006-07 was published in June 2008 allowing institutions to give a fuller report on milestones than in the first year of monitoring. As institutions have multiple objectives, different measurements of success and varying progress against each objective, it is difficult to summarise progress for the sector other than in very broad terms.

Our findings on milestones

60. Our findings on milestones are as follows:-

- 79 institutions (65 per cent) report that they are exceeding or meeting their own objectives⁸.
- 17 institutions (14 per cent) report mixed progress, with some milestones met or exceeded, and others where progress is still needed
- 13 institutions (11 per cent) have not met their aims but report some positive progress towards their goals

- 12 institutions (10 per cent) report progress that was less than anticipated. However, many report this as a one year dip in an otherwise upward trend. In all cases there was acceptable evidence that institutions are addressing any issues by changing or reviewing their bursary package, outreach work or widening participation policy.

61. On outreach and process-based milestones, institutions have reported good progress. The majority say they have carried out planned activities, or that progress has been made. Where planned activities have not taken place this is largely due to staffing issues or because widening participation priorities have been refocused.

Our conclusions on milestones

62. We are satisfied that institutions have made good progress against their own milestones.

⁸ The categorisation of whether milestones have been met or not is based on the achievement or otherwise of the main statistical milestones of interest to OFFA – for example entrants from Socio-Economic Classes 4-7. Where these are reported on with other institutional milestones such as achievement of outreach or continuation rates, we have focused on the most relevant milestones. The categorisation also excludes any milestones around entrants from Low Participation Neighbourhoods as the method of calculating these figures changed in 2007-08, making their original milestones unrealistic for many institutions. Going forward, Low Participation Neighbourhood milestones will need to be revised in line with the new measure.

Further education colleges monitoring

Background information

63. Forecasting expenditure is particularly difficult for many further education colleges (FECs) due to the small size of their higher education provision. This can lead to large variations between estimated and actual additional fee income and estimated and actual expenditure. For this reason FECs are given a wider tolerance band in their reporting and are only asked to provide explanations where actual expenditure is more than 20 per cent below their estimate.

64. A total of 50 FECs had access agreements in place in 2007-08. Ten colleges chose to charge the standard fee of £1,225 in 2007-08 and were not required to submit monitoring returns. Due to the wide variation in fees amongst FECs comparable data tables are problematic and therefore have not been included in this report. However data is available on request:-

- of the 40 colleges that charged higher variable fees, 50 per cent (20 FECs) charged the maximum allowed
- of the 20 that charged below the maximum amount, fees ranged from £1,485 to £2,765
- 33 per cent (13 FECs) had fewer than 100 students paying a variable fee. 15 per cent (6 FECs) had 500 or more students paying a variable fee.

Our findings on bursary expenditure

65. Key findings overall are that:-

- FECs spent over £5 million on bursaries for lower income students and other under-represented groups in 2007-08
- there is only a small difference between the proportion of fee income spent on bursaries and scholarships between 2006-07 and 2007-08 (see **Annex C**)

- there is no difference between actual and estimated expenditure on bursaries and scholarships for lower income students as a proportion of additional fee income. FECs estimated that approximately £6 million would be spent on bursaries and scholarships for lower income students, representing 36 per cent of additional fee income. The actual figure is £5 million which is 36 per cent of the actual additional fee income
- FECs also spent at least a further £131,000 on bursaries for students who are not in OFFA countable groups⁹
- the proportion of additional fee income that FECs spent on bursaries for lower income groups (where the minimum bursary requirement applies) ranges from four to 64 per cent
- on average, FECs charging the full fee spent 30 per cent of their additional fee income on bursary and scholarships for lower income students
- 38 per cent (15 FECs) spent 100 per cent or more than they predicted
- 30 per cent (12 FECs) spent between 80 and 99 per cent of their predicted expenditure
- 33 per cent (13 FECs) spent 79 per cent or below of their predicted expenditure. However, seven of these institutions did not charge the maximum fee. Six had fewer than 100 students paying a variable fee.

Our findings on bursary holders

66. Key findings are that:-

- over 6,500 students from lower income or other under-represented groups received a bursary
- 61 per cent of students at FECs paying variable fees received a bursary.

⁹ This figure comes from HEBSS data on the expenditure made to students where no income detail was recorded or where income was above £48,330. This information is not requested from institutions not subscribed to the HEBSS full administration service.

Our findings on outreach

67. FECs spent over £600,000 on outreach.

Our conclusions on FEC monitoring

68. We are satisfied that all institutions have met the commitments in their access agreements.

69. The majority of FECs exceeded or broadly met their expenditure forecasts.

70. Some FECs reported that take-up was an issue and they will want to continue to work to improve this.

School centred initial teacher training providers monitoring 2007-08

Background information

71. In 2007-08 there were 44 School Centred Initial Teacher Training providers (SCITTs) with access agreements. Seven SCITTs chose to charge the standard fee of £1,225 in 2007-08 and did not have to submit a monitoring return. Five charged a fee above £1,225 but below the amount allowed by their access agreement. One SCITT had no trainees.

72. SCITT providers have very small numbers of trainees and no SCITT reported an additional fee income above £100,000. Like FECs, these small numbers lead to forecasting difficulties and we only ask SCITTs to provide explanations when their actual expenditure is more than 20 per cent below their original estimate. Like FECs, variation in fee levels amongst SCITTs is problematic so comparable data tables have not been included in this report. However data is available on request.

Our findings on bursary expenditure and bursary holders

73. Key findings are that:-

- SCITTs spent £164,000 on bursaries for trainees from lower income or other under-represented groups. This represents 13.6 per cent of their additional fee income
- SCITTs spent £125,000 on outreach work
- over 250 trainees¹⁰ received a bursary.

¹⁰ This calculation does not include High Force Education SCITT or Leeds SCITT as data was not available at the time of publication.

Annex A

Summary data for sector income and expenditure: a comparison with 2006-07

Additional fee income

	2006 £000	2007 £000
HEIs	451,125	878,239
FECs	7,367	13,984
SCITTs	1,402	1,375
Total	459,894	893,598

Expenditure on bursaries and scholarships for lower income students

	2006 £000	2007 £000
HEIs	95,309	191,688
FECs	2,799	5,015
SCITTs	107	164
Total	98,215	196,867

Expenditure on bursaries and scholarships for lower income students as a proportion of additional fee income

	2006 %	2007 %
HEIs	21.1	21.8
FECs	38.0	35.9
SCITTs	7.6	11.9
Total	21.4	22.0

Expenditure on additional outreach

	2006 £000	2007 £000
HEIs	20,699	26,975
FECs	576	630
SCITTs	95	125
Total	21,370	27,730

Overall expenditure

	2006 £000	2007 £000
HEIs	116,008	219,136 ¹
FECs	3,375	5,645
SCITTs	202	290
Total	119,585	225,071

Overall expenditure as a proportion of additional fee income

	2006 %	2007 %
HEIs	25.7	25.0
FECs	45.8	40.4
SCITTs	14.4	21.1
Total	26.0	25.2

Notes on interpreting the data

1. Additional fee income is all fee income above the basic fee (£1,225 in 2007-08) for Home/European Union full-time undergraduates including Postgraduate Certificate in Education (PGCE) and Initial Teacher Training (ITT) students.

2. The expenditure on bursaries and scholarships is only the amount spent on lower income students or other under-represented groups. Lower income is defined as any student with an assessed household income of up to £48,330. This is the Government threshold for state support plus £10,000.

3. The expenditure on additional outreach is not the total amount spent by institutions on outreach or widening participation. It is the additional amount that institutions have spent following the introduction of variable fees.

¹ This figure is more than the amount of expenditure on bursaries plus outreach because it includes reallocated funds detailed in the expenditure sheet at Annex D.

3. Expenditure is based on all actual expenditure to 31 July 2008.
4. The Student Loans Company provided data for all expenditure paid from the Higher Education Bursaries and Scholarship Scheme (HEBSS) to lower income students in respect of 2007-08 up to 23 August 2008.
5. In some cases the figures for 2006-07 do not match the figures published in the OFFA publication 2008/01 because of late amendments to data.

Annex B

Expenditure on bursaries and scholarships: a comparison with 2006-07

This annex shows, as a comparison with 2006-07:-

- the proportion of additional fee income spent by individual institutions on bursaries and scholarships for students from lower income and other under-represented groups.

Higher education institutions	2006 %	2007 %
Anglia Ruskin University	29.5	36.6
Aston University	19.9	21.1
University of Bath	20.1	19.0
Bath Spa University	28.1	23.7
University of Bedfordshire	40.0	40.7
University of Birmingham	18.9	20.6
Birmingham City University	13.4	14.5
University College Birmingham	19.6	23.9
Bishop Grosseteste University College, Lincoln	33.1	32.1
University of Bolton	16.0	18.7
Arts Institute at Bournemouth	15.5	15.6
Bournemouth University	27.5	28.5
University of Bradford	17.3	22.9
University of Brighton	21.8	23.1
University of Bristol	18.4	16.5
Brunel University	13.0	14.6
Buckinghamshire New University	35.5	40.2
University of Cambridge	19.4	24.0
Canterbury Christ Church University	19.5	21.5
University of Central Lancashire	40.8	34.5
Central School of Speech and Drama	4.5	10.3
University of Chester	25.3	20.8
University of Chichester	21.8	20.7
City University, London	19.1	17.9
Courtauld Institute of Art	13.6	16.4
Coventry University	28.4	19.9
University College for the Creative Arts	7.9	11.9

Higher education institutions

	2006 %	2007 %
University of Cumbria	44.3 ¹	29.6
Conservatoire for Dance and Drama	20.4	18.6
De Montfort University	14.8	21.3
University of Derby	24.7	26.4
University of Durham	27.1	28.1
University of East Anglia	13.1	18.8
University of East London	30.3	22.0
Edge Hill University	34.9	35.3
Institute of Education	12.1	9.9
University of Essex	9.1	12.0
University of Exeter	17.1	20.6
University College Falmouth	15.4	22.0
University of Gloucestershire	17.9	13.0
Goldsmiths College, University of London	21.8	21.2
University of Greenwich	6.6	8.1
Guildhall School of Music & Drama	12.0	13.1
Harper Adams University College	20.6	17.5
University of Hertfordshire	37.6	31.0
Heythrop College ²	-	26.8
University of Huddersfield	18.7	24.8
University of Hull	22.7	24.3
Imperial College London	31.1	31.9
Keele University	11.5	11.5
University of Kent	18.4	18.3
King's College London	21.1	19.3
Kingston University	15.1	16.2
Lancaster University	17.6	18.2
University of Leeds	15.8	15.7
Leeds Metropolitan University	1.3	0.6
Leeds College of Music	16.6	19.0
Leeds Trinity & All Saints	9.9	10.0

¹ This is a joint figure representing the expenditure of St Martin's College and Cumbria Institute of the Arts which merged on 1 August 2007 to form the University of Cumbria. This merger accounts for the difference in expenditure from 2006-07 to 2007-08.

² Prior to 2006-07 Heythrop College was privately funded and charged more than the variable tuition fee. Therefore no 'additional' income was recorded.

Higher education institutions

	2006 %	2007 %
University of Leicester	19.8	18.8
University of Lincoln	39.3	25.4
University of Liverpool	26.8	25.9
Liverpool Hope University	22.9	43.5
Liverpool John Moores University	29.1	26.9
Liverpool Institute for Performing Arts	7.7	8.7
University of the Arts London	9.9	10.6
London School of Economics and Political Science	26.1	24.3
London Metropolitan University	18.6	25.7
London South Bank University	14.8	18.0
London Studio Centre	28.1	15.7
Loughborough University	13.8	14.9
University of Manchester	29.0	28.5
Manchester Metropolitan University	17.9	21.9
Middlesex University	5.8	7.0
Newcastle University	15.9	14.6
Newman University College	35.0	47.9
University of Northampton	21.9	24.8
University of Northumbria at Newcastle	22.2	19.5
Norwich University College of the Arts	9.9	12.0
University of Nottingham	22.9	19.2
Nottingham Trent University	20.8	20.2
School of Oriental and African Studies	11.1	15.9
University of Oxford	35.2	33.4
Oxford Brookes University	24.4	31.6
School of Pharmacy	14.6	16.6
University of Plymouth	13.0	15.9
University College Plymouth St Mark & St John	31.9	18.2
University of Portsmouth	15.2	17.8
Queen Mary, University of London	31.2	29.8
Ravensbourne College of Design and Communication	7.5	12.5
University of Reading	22.3	26.0
Roehampton University	15.5	14.3

Higher education institutions

	2006 %	2007 %
Rose Bruford College	7.3	9.8
Royal Academy of Music	33.7	20.8
Royal Agricultural College	13.7	18.1
Royal College of Music	5.8	6.4
Royal Holloway, University of London	17.5	23.6
Royal Northern College of Music	14.6	15.0
Royal Veterinary College	26.1	27.2
St George's Hospital Medical School	19.4	21.4
St Mary's University College	19.6	19.8
University of Salford	11.8	14.4
University of Sheffield	14.9	13.3
Sheffield Hallam University	22.5	24.2
University of Southampton	14.3	14.0
Southampton Solent University	22.6	24.2
Staffordshire University	24.9	38.3
University of Sunderland	18.9	31.4
University of Surrey	17.2	17.4
University of Sussex	19.6	14.1
University of Teesside	38.3	35.9
Thames Valley University	24.6	32.4
Trinity Laban Conservatoire of Music and Dance	7.2	8.9
University College London	23.0 ³	24.6
University of Warwick	16.6	27.1
University of the West of England, Bristol	25.5	24.4
University of Westminster	12.7	22.9
University of Winchester	24.2	23.9
University of Wolverhampton	16.3	23.0
University of Worcester	15.2	18.7
Writtle College	2.6	1.9
University of York	17.1	19.5
York St John University	30.3	33.0

³ This figure is different to the published figure for 2006-07 because the institution had reported expenditure which had already been reported from HEBSS.

Annex C

Summary data for sector income and expenditure 2007-08

Additional fee income

	Predicted £000	Actual £000
HEIs	893,865	878,239
FECs	16,927	13,984
SCITTs	1,890	1,375
Total	912,682	893,598

Expenditure on bursaries and scholarships for lower income students

	Predicted £000	Actual £000
HEIs	201,886	191,688
FECs	6,154	5,015
SCITTs	318	164
Total	208,358	196,867

Expenditure on bursaries and scholarships for lower income students as a proportion of additional fee income

	Predicted %	Actual %
HEIs	22.6	21.8
FECs	36.4	35.9
SCITTs	16.8	11.9
Total	22.8	22.0

Expenditure on additional outreach

	Predicted £000	Actual £000
HEIs	27,015	26,975
FECs	781	630
SCITTs	161	125
Total	27,957	27,730

Overall expenditure

	Predicted £000	Actual £000
HEIs	228,901	219,136
FECs	6,935	5,645
SCITTs	478	290
Total	236,314	225,071

Overall expenditure as a proportion of additional fee income

	Predicted %	Actual %
HEIs	25.6	25.0
FECs	41.0	40.4
SCITTs	25.3	21.1
Total	25.9	25.2

Notes on interpreting the data

1. Additional fee income is all fee income above the basic fee (£1,225 in 2007-08) for Home/European Union full-time undergraduates including Postgraduate Certificate in Education (PGCE) and Initial Teacher Training (ITT) students.
2. The expenditure on bursaries and scholarships is only the amount spent on lower income students or other under-represented groups. Lower income is defined as any student with an assessed household income of up to £48,330. This is the Government threshold for state support plus £10,000.
3. The expenditure on additional outreach is not the total amount spent by institutions on outreach or widening participation. It is the additional amount that institutions have spent following the introduction of variable fees.
3. Expenditure is based on all actual expenditure to 31 July 2008.
4. The Student Loans Company provided data for all expenditure paid from the Higher Education Bursaries and Scholarship Scheme (HEBSS) to lower income students in respect of 2007-08 up to 23 August 2008.

Annex D

Expenditure under access agreements 2007-08

This annex shows, for 2007-08, individual institutions':-

- estimated and actual proportions of additional fee income spent on bursaries and scholarships for lower income students – plus the actual amount spent
- amount of additional fee income spent on additional outreach work
- overall expenditure under access agreement
- unspent funds reallocated and spent on other widening participation measures in 2007-08 or carried forward.

	Bursaries and scholarships				Additional outreach		Reallocated and spent in 2007-08		Overall expenditure		Reallocated and carried forward	
	Estimated %	Actual %	Actual £000	Estimated £000	Actual £000	Estimated £000	Actual £000	Estimated %	Actual %	Actual £000	Estimated %	Actual £000
Higher education institutions												
Anglia Ruskin University	36.3	36.6	2,864	235	325			39.2	40.7	3,189		
Aston University	17.0	21.1	1,196	0	0			17.0	21.1	1,196		
University of Bath	21.1	19.0 ¹	1,393	138	136			22.9	20.9	1,530		
Bath Spa University	31.8	23.7	1,423	126	126			34.2	25.8	1,548		
University of Bedfordshire	35.2	40.7	2,365	0	0			35.2	40.7	2,365		
University of Birmingham	20.7	20.6	3,072	205	254			22.1	22.3	3,325		
Birmingham City University	17.8	14.5 ²	1,315	102	92			18.9	15.5	1,407		100
University College Birmingham	19.8	23.9	543	110	258			23.8	35.2	801		
Bishop Grosseteste University College, Lincoln	34.8	32.1	523	42	45		8	37.4	35.3	576		

¹ An increase in EU students meant an increase in fee income without the corresponding increase in bursary payments as these students are not eligible for bursaries.

² Retrospective bursary payments are available for students who were eligible but who failed to claim a bursary

Higher education institutions	Bursaries and scholarships				Additional outreach		Reallocated and spent in 2007-08		Overall expenditure		Reallocated and carried forward	
	Estimated %	Actual %	Actual £000	Actual £000	Estimated £000	Actual £000	Estimated £000	Actual £000	Estimated %	Actual %	Estimated £000	Actual £000
University of Bolton	20.0	18.7	669	88	66	88	21.8	21.1	21.8	21.1	757	757
Arts Institute at Bournemouth	15.9	15.6	346	22	20	22	16.9	16.6	16.9	16.6	368	368
Bournemouth University	26.4	28.5	2,552	100	100	100	27.8	29.6	27.8	29.6	2,652	2,652
University of Bradford	24.1	22.9 ³	1,481	0	0	0	24.0	22.9	24.0	22.9	1,481	1,481
University of Brighton	20.8	23.1	2,780	315	345	315	23.7	25.7	23.7	25.7	3,095	304
University of Bristol	19.1	16.5 ⁵	1,780	426	412	426	22.7	20.4	22.7	20.4	2,206	2,206
Brunel University	20.9	14.6 ⁶	1,328	0	0	0	20.9	14.6	20.9	14.6	1,328	1,328
Buckinghamshire New University	39.7	40.2	1,402	100	100	95	42.1	42.9	42.1	42.9	1,497	1,497
University of Cambridge	29.2	24.0 ⁷	2,501	0	0	0	29.2	24.0	29.2	24.0	2,501	2,501
Canterbury Christ Church University	28.9	21.5 ⁸	1,519	15	15	15	29.2	27.9	29.2	27.9	1,968	1,968
University of Central Lancashire	33.6	34.5	4,787	630	630	485	38.0	38.0	38.0	38.0	5,272	5,272
Central School of Speech and Drama	10.8	10.3 ⁹	73	154	154	64 ¹⁰	32.5	19.3	32.5	19.3	137	137
University of Chester	20.6	20.8	1,407	0	0	0	20.5	20.8	20.5	20.8	1,407	1,407
University of Chichester	21.8	20.7	802	57	50	57	23.1	22.2	23.1	22.2	860	860
City University, London	17.7	17.9	860	139	140	139	20.9	20.8	20.9	20.8	999	999

³ Includes £15,500 of expenditure on postgraduate bursaries for under-represented groups

⁴ Unspent funds to be carried forward and spent on outreach.

⁵ Eligibility for the bursary scheme has increased for 2008-09

⁶ Bursary scheme has been simplified and the value of awards has increased for 2008-09

⁷ Limited retrospective bursary payments are available for students who were eligible but who failed to claim a bursary. Eligibility for the bursary scheme has increased for 2008-09.

⁸ All shortfall in bursary expenditure has been reallocated.

⁹ Retrospective bursary payments are available for students who were eligible but who failed to claim a bursary.

¹⁰ An element of outreach activity expenditure allocated in 2007-08 will fall in the 2008-09 reporting year.

Higher education institutions	Bursaries and scholarships				Additional outreach			Reallocated and spent in 2007-08		Overall expenditure			Reallocated and carried forward	
	Estimated %	Actual %	Actual £000	Actual £000	Estimated £000	Actual £000	Actual £000	£000	£000	Estimated %	Actual %	Actual £000	Actual £000	£000
Courtauld Institute of Art	26.7	16.4 ¹¹	30	4	4	4	34			30.0	18.6	34		
Coventry University	16.6	19.9	1,907	967	1,128	967	2,874			27.5	30.0	2,874		
University College for the Creative Arts	13.2	11.9 ¹²	534	200	200	200	746	12		17.3	17.0	746		
University of Cumbria	34.2	29.6	1,792	236	236	240	2,032			38.2	33.6	2,032		
Conservatoire for Dance and Drama	22.5	18.6	241	0	0	0	241			22.5	18.5	241		
De Montfort University	19.9	21.3	2,593	100	100	96	2,689			20.6	22.1	2,689		
University of Derby	28.9	26.4	1,971	250	250	237	2,208			32.0	29.6	2,208		
University of Durham	29.5	28.1	3,004	188	188	218	3,222			31.2	30.1	3,222		
University of East Anglia	18.6	18.8	2,231	655	655	508	2,739			23.9	23.1	2,739		
University of East London	25.0	22.0	2,184	84	84	139	2,323			26.1	23.4	2,323		
Edge Hill University	38.2	35.3	2,382	750	750	936	3,319			49.6	49.1	3,319		
Institute of Education	10.0	9.9	200	199	199	158	358			18.0	17.7	358		
University of Essex	11.7	12.0	920	257	257	302	1,222			15.0	15.9	1,222		
University of Exeter	21.2	20.6	2,255	30	30	30	2,285			21.5	20.9	2,285		
University College Falmouth	25.0	22.0	440	19	19	18	458			26.0	23.0	458	2	
University of Gloucestershire	14.6	13.0 ¹³	828	288	288	276	1,103			18.6	17.3	1,103		

¹¹ Institution has 100 per cent take-up of bursaries but over estimated the cost of the bursary scheme.

¹² Retrospective bursary payments are available for students who were eligible but who failed to claim a bursary.

¹³ Bursary scheme has been simplified for 2008-09.

Higher education institutions	Bursaries and scholarships				Additional outreach				Reallocated and spent in 2007-08		Overall expenditure		Reallocated and carried forward	
	Estimated %	Actual %	Actual £000	Actual £000	Estimated £000	Actual £000	Estimated £000	Actual £000	£000	%	Estimated %	Actual %	£000	£000
Goldsmiths College, University of London	15.6	21.2	1,139	27	219 ¹⁴				15.9	25.3	1,358			
University of Greenwich	14.2	8.1 ¹⁵	467	200	210				20.0	11.8	677			
Guildhall School of Music & Drama	11.6	13.1	65	86	88				30.7	30.9	153			
Harper Adams University College	15.1	17.5	234	0	0				15.1	17.4	234			
University of Hertfordshire	24.7	31.0	4,178	90	115				25.3	31.9	4,293			
Heythrop College	32.7	26.8	120	89	105				63.3	50.2	225			
University of Huddersfield	27.0	24.8	2,520	0	0				27.0	24.8	2,520			
University of Hull	22.3	24.3	2,218	51	56				23.1	24.9	2,274			
Imperial College London	29.0	31.9	1,759	74	74				30.4	33.3	1,832			
Keele University	14.6	11.5 ¹⁶	599	194	118				18.4	13.7	717			
University of Kent	20.2	18.3	1,911	325	330				23.8	21.4	2,242			
King's College London	22.4	19.3	1,797	50	54				22.9	19.8	1,851		252 ¹⁷	
Kingston University	23.5	16.2	2,300	181	178				24.7	17.5	2,478			
Lancaster University	19.7	18.2	1,446	250	267				22.7	21.6	1,713			
University of Leeds	20.1	15.7	3,082	200	200				21.1	16.7	3,282		901 ¹⁸	
Leeds Metropolitan University	0.5	0.6 ¹⁹	42	1,000	1,000				10.5	15.7	1,042			

¹⁴ A large one-off payment was made for outreach activity in 2007-08.

¹⁵ The full fee is only charged for one course.

¹⁶ The value of the bursary award will increase in 2009-10

¹⁷ Funds have been carried forward for the disability fund, student hardship fund and work to enhance relationships with further education providers.

¹⁸ Unspent funds are ring-fenced and carried forward. Eligibility for bursary scheme and the value of awards have been increased for 2008-09.

¹⁹ Charged lower fees.

Higher education institutions	Bursaries and scholarships				Additional outreach		Reallocated and spent in 2007-08		Overall expenditure		Reallocated and carried forward	
	Estimated %	Actual %	Actual £000	Actual £000	Estimated £000	Actual £000	Estimated £000	Actual £000	Estimated %	Actual %	Estimated £000	Actual £000
Leeds College of Music	15.8	19.0	135	32	34	32	19.9	23.4	19.9	23.4	167	167
Leeds Trinity & All Saints	12.5	10.0 ²⁰	146	82	82	82	17.6	15.6	17.6	15.6	228	228
University of Leicester	18.5	18.8	1,549	200	200	200	21.0	21.3	21.0	21.3	1,749	1,749
University of Lincoln	25.0	25.4	2,449	380	400	380	29.4	29.3	29.4	29.3	2,829	2,829
University of Liverpool	23.5	25.9	2,834	263	230	263	25.3	28.3	25.3	28.3	3,096	3,096
Liverpool Hope University	38.5	43.5 ²¹	2,528	100	100	100	40.2	45.2	40.2	45.2	2,628	2,628
Liverpool John Moores University	27.5	26.9	4,066	224	225	224	28.8	28.4	28.8	28.4	4,290	4,290
Liverpool Institute for Performing Arts	7.5	8.7	56	54	60	54	16.7	17.1	16.7	17.1	110	110
University of the Arts London	12.2	10.6	1,199	1,255	1,223	1,255	24.3	21.6	24.3	21.6	2,454	17
London School of Economics and Political Science	23.8	24.3	647	150	150	150	29.3	29.9	29.3	29.9	797	797
London Metropolitan University	38.2	25.7	3,063	0	0	0	38.2	25.7	38.2	25.7	3,063	3,063
London South Bank University	20.0	18.0 ²²	1,114	240	213	240	23.0	21.9	23.0	21.9	1,354	1,354
London Studio Centre	17.0	15.7 ²³	51	55	53	55	34.0	32.4	34.0	32.4	106	106
Loughborough University	13.4	14.9	1,562	204	284	204	16.0	16.8	16.0	16.8	1,766	1,766
University of Manchester	29.2	28.5	5,703	380	380	380	31.1	30.3	31.1	30.3	6,083	6,083
Manchester Metropolitan University	28.2	21.9	4,525	683	683	683	31.2	25.2	31.2	25.2	5,208	234 ²⁴

²⁰ Charged lower fees. Bursary scheme has been simplified for 2009-10.

²¹ Retrospective bursary payments are available for students who were eligible but who failed to claim a bursary.

²² Retrospective bursary payments are available for students who were eligible but who failed to claim a bursary.

²³ Late bursary awards were pending at the time of reporting and are not reflected in the figures.

²⁴ £900k has been reallocated over a three year period to fund postgraduate study for students who would otherwise not be able to afford it. It is estimated that 26 per cent of this (£234k) will be allocated to students from under-represented groups.

Higher education institutions	Bursaries and scholarships				Additional outreach		Reallocated and spent in 2007-08		Overall expenditure		Reallocated and carried forward	
	Estimated %	Actual %	Actual £000	Actual £000	Estimated £000	Actual £000	Estimated £000	Actual £000	Estimated %	Actual %	Estimated £000	Actual £000
Middlesex University	5.7	7.0	901	360	360	360	8.5	9.8	1,261			
Newcastle University	18.0	14.6 ²⁵	1,915	1,172	1,200		26.1	23.8	3,115	13		
Newman University College	36.0	47.9	769	70	70		39.3	52.2	839			
University of Northampton	25.0	24.8	1,196	20	20		25.4	25.2	1,216			
University of Northumbria at Newcastle	21.4	19.5	2,601	0	0		21.4	19.5	2,601			
Norwich University College of the Arts	12.5	12.0	165	13	13		13.3	12.9	177			
University of Nottingham	19.8	19.2	2,939	250	385		21.3	21.7	3,324	225 ²⁶		
Nottingham Trent University	19.8	20.2	3,501	325	356		21.6	22.2	3,857			
The Open University	-27	-	-	43	40		10.0	9.9	40			
School of Oriental and African Studies	16.0	15.9	313	100	67		20.6	19.3	380			
University of Oxford	32.6	33.4	3,634	0	0		32.6	33.4	3,634			
Oxford Brookes University	34.2	31.6	2,589	360	373		38.7	36.2	2,962			
School of Pharmacy	25.0	16.6	85	0	0		25.0	16.6	85			
University of Plymouth	19.1	15.9 ²⁸	1,502	260	236		21.9	18.4	1,739			

²⁵ Retrospective bursary payments are available for students who were eligible but who failed to claim a bursary. Eligibility for bursary scheme and value of awards have both been increased for 2009-10. The institutional widening participation policy is currently under review.

²⁶ Unspent funds carried forward for hardship fund and widening participation projects.

²⁷ The Open University's access agreement only covers flexible PGCE courses where the fees are met by the TDA and there is no requirement to provide bursaries.

²⁸ Eligibility for the bursary scheme and the value of awards have been increased for 2008-09.

Higher education institutions	Bursaries and scholarships				Additional outreach			Reallocated and spent in 2007-08		Overall expenditure		Reallocated and carried forward	
	Estimated %	Actual %	Actual £000	Actual £000	Estimated £000	Actual £000	Actual £000	£000	£000	Estimated %	Actual %	Actual £000	Actual £000
University College Plymouth St Mark & St John	17.4	18.2 ²⁹	317	49	53	49				19.9	20.9	366	
University of Portsmouth	19.1	17.8	2,351	647	636	647				24.0	22.7	2,998	
Queen Mary, University of London	32.2	29.8	2,835	0	0	0				32.2	29.8	2,835	
Ravensbourne College of Design and Communication	20.7	12.5	126	82	80	82	20			33.4	22.7	228	
University of Reading	27.2	26.0	2,128	259	326	259				30.9	29.2	2,386	
Roehampton University	6.3	14.3 ³⁰	982	140	155	140				8.6	16.3	1,122	
Rose Bruford College	11.5	9.8 ³¹	73	85	42	85				17.9	21.2	158	
Royal Academy of Music	20.0	20.8	47	16	16	16				26.8	27.8	63	
Royal Agricultural College	18.2	18.1	120	22	24	22				21.7	21.4	143	
Royal College of Music	7.1	6.4	15	16	16	16				14.0	13.2	31	
Royal Holloway, University of London	19.8	23.6	1,158	216	291	216				25.8	28.0	1,374	
Royal Northern College of Music	14.7	15.0	62	36	32	36				22.8	23.7	98	
Royal Veterinary College	34.2	27.2	297	34	38	34				37.2	30.3	331	
St George's Hospital Medical School	20.4	21.4	280	73	47	73				23.9	27.0	353	
St Mary's University College	24.0	19.8	698	110	116	110				28.2	22.9	807	
University of Salford	11.1	14.4	1,718	310	300	310				13.7	17.0	2,028	

²⁹ Charged lower fees.

³⁰ The access agreement and financial estimates were deliberately conservative and based on awarding the minimum bursary amount to allow flexibility in changing the bursary offer without having to change the bursary scheme. The actual value of individual bursaries has been larger than the minimum.

³¹ Eligibility for the bursary scheme and the value of awards have both been increased for 2008-09.

Higher education institutions	Bursaries and scholarships				Additional outreach		Reallocated and spent in 2007-08		Overall expenditure		Reallocated and carried forward	
	Estimated %	Actual %	Actual £000	Estimated £000	Actual £000	Actual £000	Estimated £000	Actual £000	Estimated %	Actual %	Estimated £000	Actual £000
University of Sheffield	13.5	13.3	1,809	823	608		19.6	17.8	19.6	17.8	2,416	
Sheffield Hallam University	19.7	24.2	4,246	510	550		22.9	27.4	22.9	27.4	4,796	
University of Southampton	19.3	14.0	1,642	220	370		21.3	17.2	21.3	17.2	2,012	120 ³²
Southampton Solent University	24.0	24.2	1,948	384	524		29.1	30.7	29.1	30.7	2,473	
Staffordshire University	32.9	38.3	2,620	300	313		36.3	42.9	36.3	42.9	2,933	
University of Sunderland	32.8	31.4	2,257	700	634		41.4	40.2	41.4	40.2	2,891	
University of Surrey	19.0	17.4	1,044	100	100		20.8	19.1	20.8	19.1	1,144	195
University of Sussex	15.5	14.1	1,048	210	198		18.4	16.8	18.4	16.8	1,246	15
University of Teesside	31.1	35.9	2,422	280	290		34.8	40.2	34.8	40.2	2,712	
Thames Valley University	34.5	32.4 ³³	1,435	200	117		38.3	35.0	38.3	35.0	1,552	
Trinity Laban Conservatoire of Music and Dance	6.3	8.9	57	108	107		22.9	25.5	22.9	25.5	165	
University College London	20.7	24.6	2,018	350	293		25.0	28.1	25.0	28.1	2,310	670
University of Warwick	30.1	27.1	2,657	634	572		36.6	32.9	36.6	32.9	3,229	
University of the West of England, Bristol	23.6	24.4	3,992	1,232	1,199		31.1	31.8	31.1	31.8	5,191	
University of Westminster	18.2	22.9	2,547	748	582		24.6	28.1	24.6	28.1	3,130	
University of Winchester	21.9	23.9	965	78	100		23.9	26.4	23.9	26.4	1,064	
University of Wolverhampton	25.0	23.0	2,469	0	60		25.0	23.5	25.0	23.5	2,529	

³² Funds carried forward for retrospective bursary payments.

³³ Charged lower fees.

Higher education institutions	Bursaries and scholarships				Additional outreach		Reallocated and spent in 2007-08		Overall expenditure		Reallocated and carried forward	
	Estimated %	Actual %	Actual £000	Actual £000	Estimated £000	Actual £000	Estimated £000	Actual £000	Estimated %	Actual %	Estimated £000	Actual £000
University of Worcester	17.8	18.7	867	184	184	184	21.4	22.6	21.4	22.6	1,052	30
Writtle College	1.3	1.9 ³⁴	18	85	85	85	7.7	11.3	7.7	11.3	103	
University of York	19.2	19.5	1,449	136	125	136	21.0	21.3	21.0	21.3	1,585	
York St John University	31.4	33.0 ³⁵	864	53	90	53	34.8	35.0	34.8	35.0	917	10
Total	22.6	21.8	191,688	27,015	26,975	474	25.6	25.0	25.0	219,136	2,814	

Notes on interpreting the data

1. The expenditure on bursaries and scholarships is only the amount spent on lower income students or other under-represented groups. Lower income is defined as any student with an assessed household income of up to £48,330. This is the Government threshold for state support plus £10,000.

2. The expenditure on additional outreach is not the total amount spent by institutions on outreach or widening participation. It is the additional amount that institutions have spent following the introduction of variable fees. Where an institution has a zero entry, this does not mean they spend

nothing on outreach – it means they are either not using additional fee income to invest further in outreach (ie on top of what they are already spending), or have chosen not to include such investment in their access agreement.

3. Expenditure is based on all actual expenditure to 31 July 2008.

4. The Student Loans Company provided data for all expenditure paid from the Higher Education Bursaries and Scholarship Scheme (HEBSS) to lower income students in respect of 2007-08 up to 23 August 2008.

³⁴ Charged lower fees.

³⁵ Charged lower fees.

Annex E

Bursary and scholarship holders

This annex shows for 2007-08:-

- the number of undergraduate students at individual institutions who hold a bursary or scholarship. It excludes awards paid to students who do not fall in 'OFFA-countable groups'
- the proportion of full fee-paying students this number represents.

Higher education institutions	With assessed household income of up to £17,910		Other OFFA countable incomes/groups		Total OFFA countable	
	Number	%	Number	%	Number	%
Anglia Ruskin University	1,241	29	1,724	41	2,965	70
Aston University	1,041	34	517	17	1,558	51
University of Bath	658	16	557	13	1,215	29
Bath Spa University	947	29	634	19	1,581	48
University of Bedfordshire	1,562	50	472	15	2,034	65
University of Birmingham	1,471	18	1,005	12	2,476	30
Birmingham City University	1,843	37	743	15	2,586	52
University College Birmingham	453	38	195	16	648	54
Bishop Grosseteste University College, Lincoln	249	24	255	25	504	49
University of Bolton	986	56	273	14	1,259	70
Arts Institute at Bournemouth	255	21	156	13	411	34
Bournemouth University	1,335	24	885	16	2,220	40
University of Bradford ¹	1,932	59	569	17	2,501	76
University of Brighton	1,989	27	1,033	20	3,022	48
University of Bristol	815	14	830	14	1,645	28
Brunel University	1,258	24	845	16	2,103	40
Buckinghamshire New University	700	37	624	33	1,324	70
University of Cambridge	576	12	565	11	1,141	23
Canterbury Christ Church University	1,398	36	742	20	2,140	56
University of Central Lancashire	2,929	39	1,786	24	4,715	63
Central School of Speech and Drama	73	19	-	-	73	19

¹ There were an additional 31 postgraduate beneficiaries that are not counted in these figures which only reflect undergraduate bursary holders.

	With assessed household income of up to £17,910		Other OFFA countable incomes/groups		Total OFFA countable	
Higher education institutions	Number	%	Number	%	Number	%
University of Chester	1,026	28	477	13	1,503	41
University of Chichester	576	25	348	15	924	40
City University, London	879	33	-	-	879	33
Courtauld Institute of Art	10	9	-	-	10	9
Coventry University	1,545	16	1,040	11	2,585	27
University College for the Creative Arts	701	22	54	2	755	24
University of Cumbria	1,248	36	854	25	2,102	61
Conservatoire for Dance and Drama	110	16	85	13	195	29
De Montfort University	2,390	37	1,410	22	3,800	58
University of Derby	1,477	36	920	22	2,397	58
University of Durham	926	16	385	7	1,311	23
University of East Anglia	1,672	22	1,306	21	2,978	42
University of East London	2,842	46	1,017	16	3,859	62
Edge Hill University	1,366	37	1,115	31	2,481	68
Institute of Education	460	34	179	13	639	46
University of Essex	767	23	568	17	1,335	40
University of Exeter	1,153	21	611	11	1,764	33
University College Falmouth	360	29	280	23	640	52
University of Gloucestershire	715	20	258	7	973	27
Goldsmiths College, University of London	1,063	23	269	6	1,332	28
University of Greenwich	556	15	153	4	709	19
Guildhall School of Music & Drama	31	12	38	14	69	26
Harper Adams University College	152	18	133	15	285	33
University of Hertfordshire	2,005	29	1,023	15	3,028	44
Heythrop College	72	29	30	12	102	41
University of Huddersfield	2,558	42	447	7	3,005	50
University of Hull	1,452	29	976	19	2,428	48
Imperial College London	418	17	347	14	765	30
Keele University	671	25	114	4	785	30
University of Kent	1,328	24	958	18	2,286	42
King's College London	1,044	17	554	9	1,598	26

	With assessed household income of up to £17,910		Other OFFA countable incomes/groups		Total OFFA countable	
Higher education institutions	Number	%	Number	%	Number	%
Kingston University	2,599	34	1,124	15	3,723	48
Lancaster University	758	20	326	9	1,084	29
University of Leeds	1,802	17	1,383	13	3,185	29
Leeds College of Music	79	20	71	18	150	38
Leeds Trinity & All Saints	394	24	243	14	637	38
University of Leicester	964	22	660	15	1,624	37
University of Lincoln	1,411	29	1,065	21	2,476	50
University of Liverpool	1,308	22	1,057	18	2,365	39
Liverpool Hope University	1,234	41	775	25	2,009	66
Liverpool John Moores University	3,372	41	1,843	23	5,215	64
Liverpool Institute for Performing Arts	68	19	83	24	151	43
University of the Arts London	1,403	23	253	4	1,656	27
London School of Economics and Political Science	250	17	142	9	392	26
London Metropolitan University	2,732	not provided	469	not provided	3,201	not provided
London South Bank University	1,576	50	298	10	1,874	60
London Studio Centre	22	12	23	12	45	24
Loughborough University	818	14	666	11	1,484	25
University of Manchester	2,292	21	1,314	12	3,606	33
Manchester Metropolitan University	3,535	30	1,706	15	5,241	45
Middlesex University	2,374	31	85	1	2,459	32
Newcastle University	972	14	745	11	1,717	25
Newman University College	586	46	350	27	936	73
University of Northampton	851	32	921	30	1,772	62
University of Northumbria at Newcastle	2,010	29	1,862	27	3,872	56
Norwich University College of the Arts	224	28	155	19	379	47
University of Nottingham	1,260	15	1,618	20	2,878	35
Nottingham Trent University	2,373	25	1,565	17	3,938	42
School of Oriental and African Studies	315	43	92	12	407	55
University of Oxford	683	12	679	12	1,362	23
Oxford Brookes University	926	21	514	12	1,440	32

	With assessed household income of up to £17,910		Other OFFA countable incomes/groups		Total OFFA countable	
Higher education institutions	Number	%	Number	%	Number	%
School of Pharmacy	111	40	38	14	149	54
University of Plymouth	1,189	18	201	3	1,390	21
University College Plymouth St Mark & St John	326	20	291	18	617	39
University of Portsmouth	1,754	25	534	8	2,288	32
Queen Mary, University of London	1,983	39	571	11	2,554	51
Ravensbourne College of Design and Communication	127	37	28	8	155	45
University of Reading	1,066	19	843	15	1,909	35
Roehampton University	1,236	31	486	12	1,722	43
Rose Bruford College	109	25	23	6	132	31
Royal Academy of Music	17	14	18	15	35	28
Royal Agricultural College	48	15	40	12	88	27
Royal College of Music	14	11	7	5	21	16
Royal Holloway, University of London	606	23	425	16	1,031	39
Royal Northern College of Music	37	32	41	36	78	68
Royal Veterinary College	78	13	115	19	193	33
St George's Hospital Medical School	196	27	85	12	281	39
St Mary's University College	525	34	444	28	969	62
University of Salford	2,200	41	763	14	2,963	55
University of Sheffield	1,250	17	1,009	14	2,259	31
Sheffield Hallam University	2,848	44	2,947	46	5,795	90
University of Southampton	1,095	18	572	9	1,667	28
Southampton Solent University	1,628	31	719	14	2,347	45
Staffordshire University	1,722	30	1,045	18	2,767	48
University of Sunderland	2,162	45	1,191	25	3,353	70
University of Surrey	566	20	384	13	950	33
University of Sussex	937	21	73	2	1,010	23
University of Teesside	1,455	39	684	18	2,139	57
Thames Valley University	1,409	49	457	16	1,866	65
Trinity Laban Conservatoire of Music and Dance	66	19	43	12	109	31
University College London	730	18	460	11	1,190	29
University of Warwick	860	17	762	15	1,622	32

	With assessed household income of up to £17,910		Other OFFA countable incomes/groups		Total OFFA countable	
Higher education institutions	Number	%	Number	%	Number	%
University of the West of England, Bristol	2,580	29	1,021	12	3,601	41
University of Westminster	2,794	50	686	12	3,480	62
University of Winchester	565	26	697	32	1,262	57
University of Wolverhampton	2,149	36	1,148	19	3,297	55
University of Worcester	764	31	564	23	1,328	54
Writtle College	71	17	-	-	71	17
University of York	661	15	678	16	1,339	31
York St John University	537	27	55	3	592	30
Total	132,946		72,594		205,540	42

Notes on interpreting the data

1. We ask institutions to report only on the number of bursary or scholarship holders from lower income or other under-represented groups. The number of bursary or scholarship holders reported is therefore not the total number of students receiving financial support at an institution.

2. The figures for the number of bursary and scholarship holders do not include the numbers of students awarded financial support through additional hardship funds established at institutions from their additional fee income.

3. The Student Loans Company provided data for all bursary holders paid from the Higher Education Bursaries and Scholarship Scheme (HEBSS) up to 23 August 2008.

4. For institutions that charge a lower fee the figures are the number of students in receipt of a bursary or scholarship and the percentage of their total number of students that this represents.

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