EQUITY SCHOLARSHIP PROVISION AND IMPACTS
NCSEHE-Funded Research Review
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Australian universities provide equity scholarships to new and continuing students as a standard practice. The equity scholarships that are made available across universities vary in amount and duration and also in stated eligibility criteria. A process through which eligibility is determined and through which the scholarships are administered, also varies significantly from institution to institution. Until relatively recently, there has been little data available which reflects both institutional practice(s) in the provision of equity scholarships and the impacts on the recipients – the students – of these scholarships. This is an issue of concern for funders and providers alike given that the aggregated number of scholarships offered has, in an uncapped and HEPPP funded context, raised significantly in the period between 2009 and 2016. Addressing the range of issues associated with an uncapped environment is currently the focus of the newly formed Higher Education Standards Panel (HESP, 2016).

As part of its national mandate to highlight and address issues pertaining to student equity in Australia, the NCSEHE has commissioned a review of four recent Australian studies focussed on equity scholarships. The purpose of this review is to:

- Identify which scholarship architectures are most appropriate;
- Determine which equity students relative to need benefit most from scholarships;
- What the threshold amounts for scholarships are that have most impact; and
- Identify best institutional practice for administering scholarships.

Based on this analysis, the review aims to also posit recommendations with respect to:

- Policy – for funders and providers;
- Institutional administration of equity scholarships; and
- Future research priorities.
2. Sample and Approach

Consistent with the aims of the review, a purposive sample approach was used. This meant identifying research that met the criteria of being:

- Recent (undertaken within the last 5 years)
- Undertaken within the Australian national context (for consistency of nomenclature/funding parameters and sociodemographic context)
- Focused on an aspect, or aspects of equity scholarship policy, provision, administration and impact including lived experiences of recipients as well as providers, and
- Generated identifiable findings which could serve to inform practice in other institutional contexts.

So as to not exclude research currently in progress completion and publication were not included as criteria. Based on the criteria above, four studies were identified for inclusion in the review. Those identified are presented in the following table.

<table>
<thead>
<tr>
<th>Study Number, Title &amp; Authors</th>
<th>Date</th>
<th>Method(s)</th>
<th>Status</th>
<th>Domain Availability</th>
</tr>
</thead>
<tbody>
<tr>
<td>4. Clerke, T. &amp; Raffaele, C. Maximising the capacity for equity scholarships to improve participation and success in higher education by people from low SES backgrounds</td>
<td>2016</td>
<td>Survey – with students, staff and stakeholders</td>
<td>Preliminary findings available</td>
<td>Web resource: University of Technology, Sydney</td>
</tr>
</tbody>
</table>

Table 1 Studies included in review
3. Summary Findings

Having reviewed the studies and, inter alia, their varied foci, the findings across them have been aggregated under the three key areas of:

1. equity scholarships
2. student cohorts/characteristics, and
3. impacts.

These are presented in the following sections. Sources of findings are indicated by study number from previous table, i.e. 1-4.

3.1 Equity Scholarships

3.1.1 Administration and Evaluation
- Structural arrangements, accountabilities and reporting lines with respect to equity scholarships are variable across institutions (2).
- Collaboration between institutions and agencies expedites efficient equity scholarship processing (2,3)
- Evaluation of impacts of scholarships across institutions has been variable to date, as has the extent to which it has informed institutional policy (1, 2, 3).

3.1.2 Amount and Duration
- All equity scholarships have a positive impact (1, 2, 3, 4) but higher value ($7,500 - $10,000+) and longer duration scholarships have a proportionally greater impact for most, but not all, students (1, 3, 4).
- Scholarships of even small amounts (e.g. $500) can make a difference to equity students with high degrees of financial stress (3, 4).

3.1.3 Applications Processes
- Transparency of decision making processes is important in ensuring fairness, engendering trust in outcomes (2, 3).
- Providing support to students through the application process is important (4).
- Streamlined processing of scholarship applications, a “bundling” supports approach and a “one form” orientation is best practice and least stressful to applicants, mitigating the effects of “application fatigue” (2, 3).

3.1.4 Architecture
- Simple architectures are the most powerful (3).
- Equity scholarship architectures and their discrete foci (e.g. specific equity group) are most powerful when informed by relevant stakeholder groups (2).

3.1.5 Autonomy
- Institutional autonomy is important in setting priorities for equity scholarship provision relative to context, profile and strategy (2,3).
- Institutional autonomy in equity scholarship provision enhances flexibility in a fluid policy environment (2).

3.1.5 Communications
- Naming and framing are important considerations in how equity scholarships are communicated and the ways in which they are viewed (2).
- Commencing students are not always aware of the availability of equity scholarships and other supports, so promoting scholarship availability early is important (1, 2, 4).
- Information regarding equity scholarships can be difficult to find for potential applicants (1, 2, 4).
- Organic communications strategies such as “tell a friend” can be valuable in growing awareness (2, 3).
- University staff can benefit from greater awareness of equity scholarship provisions within their institution as they represent an important potential philanthropic source (2, 3, 4).

3.1.6 Ethos
- Equity scholarships delivered within the ethos of a “caring community” (2, 3) that include a range of supports represent best practice.
- Normalisation of need as opposed to stigmatisation relative to disadvantage contributes to an empowering ethos for applicants (2,3).

3.1.7 Merit
- Where merit (ATAR score/previous academic achievement) is included as either a primary or secondary eligibility criterion, retention and success rates are enhanced. Although 3 noted that effect of merit criteria variable is dependent on institution. However, this finding should be viewed with caution as it does not reflect the presence of confounding variables and may represent an “in-built achievement bias” (3).

3.1.8 Timing
- Provision of equity scholarships prior to Census date reduces financial stress (3,4). Scholarship holding – especially retention – as poverty is (3).
3.2 Student Cohorts/Characteristics

3.2.1 Complexity
- Complex life circumstances are not as responsive to the impacts of scholarship holding – especially retention – as poverty is (3).

3.2.2 Equity groups, age and gender
- Overall low SES students comprise the largest cohort to receive scholarships (3, 1).
- The 25-29 year age group was the group in which the largest and most consistent retention effect was observable (3).
- Female scholarship recipients had higher retention and success rates than male recipients (3).

3.2.3 Financial Neediness
- Those with greatest levels of financial neediness (but low amounts of complex life circumstances) respond most significantly to scholarship provision (3).

3.2.4 Recruitment
- The availability of equity scholarships does not have a strong impact on equity student choice of institution, i.e. it does not seem to work as a focus of recruitment, per se (1, 3, 4).

3.3 Impacts

3.3.1 Belonging and Loyalty
- Receiving an equity scholarship enhances a sense of belonging to the university community and loyalty to it (1, 3, 4).

3.3.2 Engagement
- Receiving an equity scholarship enables greater levels of engagement in university life and enhanced civic contribution (1, 3, 4).

3.3.3 Independence
- Scholarship holders experience an enhanced sense of independence; practically, from parents/carers; and, existentially, in terms of greater levels of choice and control (1, 4).

3.3.4 Motivation
- Recipients of equity scholarships experience enhanced motivation towards their studies now and in career/postgraduate plans for the future (1, 3).

3.3.5 Performance
- Students who receive equity scholarships perform above average, however, performative effects vary across different equity groups (1, 3).

3.3.6 Psychological “Boost” and Efficacy Beliefs
- Receiving a scholarship can provide recipients with a psychological “boost” which stems from feeling valued and supported and can strengthen belief in self efficacy relative to meeting demands of university life competently (1, 3).

3.3.7 Retention
- Holding an equity scholarship tends to enhance retention across all equity groups (1, 3, 4) although 3 stated this was often dependent on institution.
- Students who have undertaken previous studies – either TAFE or university, complete or incomplete – have higher retention outcomes with a scholarship (3).
- Students from Aboriginal and Torres Strait Islander backgrounds who are scholarship recipients have higher retention outcomes (3).
- In adjusting to university life, access to a scholarship and/or financial support can be the most important factor, followed by the availability of appropriate academic support (4).

3.3.9 Security
- Being awarded an equity scholarship enhances feelings of security and provides a “safety net” of financial support (1, 3, 4).

3.3.10 Social Inclusion
- Being a scholarship recipient means real and symbolic inclusion in not only the university as a whole, but more broadly, in society (1, 4).

3.3.11 Time/Work
- Equity scholarship recipients report they have more time for study (1, 3, 4).
- Scholarship recipients who work less have best outcomes (1, 3, 4).

Each of the studies reviewed, with the exception of 4, contained a series of recommendations. Rather than re-present these, what follows in the next section is a synthesis of key recommendations that are based in the aggregated findings presented above. The headings of scholarships, students and impacts are retained for consistency.
4. Synthesis: Key Recommendations for Policy and Provision

Based on the meta-analytic review of the studies on equity scholarships in Australia (as cited in Section 2), the following summative recommendations are posited for consideration by funders and providers in order to inform and guide both policy and practice. Each summative recommendation section contains three key recommendations and is preceded by a brief discussion which serves to encapsulate issues and phenomena identified in the findings.

At an aspirational level, it is hoped that these recommendations may also stimulate the identification of best practice guidelines for equity scholarship provision in Australia.

4.1 Scholarships

Australian universities offer equity scholarships to enhance the representation of equity and under-represented groups as part of their institutional strategy as well as being a means through which to enact their social contract. The means to an end of equity scholarship offerings is a more inclusive society in which people from all backgrounds are equitably represented in the professional workforce. The ways in which universities organise, oversee and administer equity scholarships varies relative to context, strategic priorities and extant relationships with key agencies (e.g. TACs, Centrelink) and stakeholder groups. Ultimately, the suite of equity scholarships on offer and the eligibility criteria represent, to a greater or lesser extent, institutional values and culture such as meritorious academic performance. Despite a recent focus nationwide on equity scholarship offerings, information regarding scholarship availability can be difficult to find, predicating a need to focus on proactive communication strategies through a range of media/channels.

4.1.1 Recommendation 1

Promoting equity scholarships to students from under-represented backgrounds who face structural, technology and informational barriers will require innovative solutions to identify more appropriate channels of communication and improve the quality of applicants in terms of need. Strategies can be informed by market research and concept testing to target scholarships to students from disadvantaged background. Equity scholarship offerings need to be communicated widely, through multiple platforms and students need support in accessing and completing applications. Processing of, and decision-making with respect to, applications should be transparent and timing should allow for delivery pre-Census cut-off date.

4.1.2 Recommendation 2

Equity scholarships should be offered as part of a “bundle” of supports (e.g. information should be provided alongside offer of acceptance, particularly to students applying from recognised low SES/regional schools, counselling, child care etc.) within an ethos which normalises need. The way that scholarships are structured (their architecture) should be as straightforward as possible to enhance uptake and maximise impact.

4.1.3 Recommendation 3

While all equity scholarships make a difference to students and have a positive impact on retention, amounts of higher value ($7,500 +) and longer duration (more than one year) have a greater net impact.
4.2 Students

An uncapped environment has provided more opportunities for more Australians to participate in higher education and, in doing so, transform many aspects of their lives and of those around them (OECD, 2009). For first in family students, this is especially true. However, numerous challenges still exist for students from low SES, Aboriginal, rural/regional, CALD and disability backgrounds. Accordingly, considering and treating each student on a case by case, needs oriented, basis is important as the mix of factors affecting each varies significantly. Financial support – whilst highly important – without support is inadequate in mitigating the challenges posed by complex life circumstances. Due to the mix of these factors, scholarship impacts vary within the different equity groups.

4.2.1 Recommendation 4
Scholarship application processes should be as streamlined as possible and expedite the identification of a range of other needs to ensure supports are mobilised quickly and efficiently.

4.2.2 Recommendation 5
Whilst equity scholarship availability does not constitute a powerful factor in institutional choice, information regarding equity scholarship availability is important to include in recruitment information as students from equity groups view it as an access (to higher education) strategy.

4.2.3 Recommendation 6
That, as well as supporting a range of equity groups consistent with institutional context and strategy, universities consider that low SES (and most financially distressed), female, 25-29 year old students who have had previous study experience (either at TAFE or university) are the groups upon whom scholarships have greatest impact. The finding that scholarship provision impacts positively on indigenous student retention should also inform policy and provision.

4.3 Impacts

The research reported in the studies included in this review contains some new findings with respect to the impacts of equity scholarships. Whilst it is clear that all students benefit from the provision of scholarships and that it has a positive impact on both retention and performance, additional impacts have been noted. These include enhancing students’ sense of belonging, loyalty, civic engagement, inclusion and, concomitantly, the development of efficacy beliefs. As captured in the narrative data, students report that being awarded a scholarship gave them a psychological “boost” which motivated them in the present, but also stimulated consideration of future postgraduate study and career planning. Students also reported the development of an ethic of “giving back” – not to the institution per se, but to future generations of students experiencing disadvantage. As suggested in all the studies, there is a value beyond money in terms of equity scholarship impact.

4.3.1 Recommendation 7
Given the finding that equity scholarships enable students to work less, and that this has a positive impact on academic performance and engagement, that universities note (as per Recommendation 4.1.3) that higher value scholarships proportionally reduce amount of time in paid work and hence, proportionally increase positive net impacts.

4.3.2 Recommendation 8
That universities provide appropriate, timely, academic support alongside equity scholarship provision to facilitate adjustment to university life and its attendant demands.

4.3.3 Recommendation 9
Universities can amplify the positive impacts of equity scholarship provision such as belonging, loyalty, security, independence, inclusion and engagement through creating and providing opportunities for social connectedness and service learning, e.g. mentoring programs, volunteering activities in disadvantaged communities.
The studies included in this review have, as a whole, provided some timely findings with respect to equity scholarship provision in Australia. However, as several suggest, there is still much to be explored and understood in this inherently complex arena. The journey through higher education is an essentially transformative one, but each person has a unique journey given the mix of life circumstances and contextual demands they contend with on a daily basis. It is this journey – at the level of the individual, family and community – about which we have little information. We also have little information about the impact of the journey into professional and civic spaces at a societal level and what this means now and into the future. Additionally, at a performative level, whilst it has been noted that all equity students benefit from being a scholarship recipient, the impact is not the same across all groups. The reasons, however, for such inter-group variations remain unclear. Based on the aggregated findings and stated recommendations of the studies included, the following recommendations for future research are presented for consideration:

**Research Recommendations**

In terms of research recommendations what is required is to provide evidence of the impact of scholarships in order to determine the true impact of what is a patchwork of offerings across the sector currently. The findings indicate that significant funds are devoted to scholarships and evaluation practice is diverse in terms of ascertaining its likely impact and efficacy of those funds. There is scope for institutions to ‘own’ aspects of their scholarships practice and implement evaluation frameworks through which the institution-level impacts of scholarships become more visible. This would allow for improvement of processes on the run, and also to acquit against funding.

What needs investigation is how much of this information may already be captured through existing collections. For instance, the first and final year questionnaire of the University Experience Survey (UES), which is completed by a large number of students, could form the basis of data collection on scholarships. If there are gaps in the UES they can be addressed through the introduction of a module in the UES for scholarship recipients only. This would provide the type of data needed to access the impact of scholarships without necessarily initiating a new survey. The challenge would be to ensure that more scholarship recipients completed the UES and the additional questions. Completion of the UES could be a condition of scholarships.

A data set on scholarship holders of this type would allow for sophisticated statistical modelling, including multivariate analysis, to be undertaken at institutional, state and federal levels to determine causal relationships between student background, age, scholarship type, duration, university context (equity support infrastructure) etc. This will complement the extent, descriptive statistics available and provide a more detailed picture of the impact of scholarships. This could complement a national, multi method, longitudinal study that tracks individual students from equity backgrounds. This should include those who have been in receipt of a scholarship so that intra- and inter-group comparisons can be made on a range of indicators (including access to and use of social and academic support). This could also include ethnographic research component within discrete socio-demographic communities (e.g. remote communities) and socio-cultural communities (e.g. Indigenous, CALD communities) to illuminate the meanings associated with community members (in receipt of an equity scholarship) engaging in higher education and impacts on aspiration and attainment.


