

# Expression of interest

# Title: Student Income and Expenditure Survey 2019/20

**Project reference:** DFERPPU/2019/015

**Deadline for expressions of interest: 23.59 12th September 2019**

## Summary

We are seeking Expressions of Interest from contractors interested in undertaking the next wave of the Student Income and Expenditure Survey in the academic year 2019/20.

## Background

The Student Income and Expenditure Survey (SIES) series is the most comprehensive and authoritative assessment of the income and expenditure of students in Higher Education in England and Wales. The series has developed over time to reflect the significant changes in student support and finance.

The most recent SIES was in the academic year 2014/15. This was a large scale survey covering around 6500 full-time and part time students in higher education, domiciled and studying in England and Wales across 84 universities and colleges. The survey was conducted online and/or telephone and included a 7 day expenditure diary. The results were published in March 2018 (English report). A copy of the report is available at: <https://www.gov.uk/government/publications/student-income-and-expenditure-survey-2014-to-2015>

SIES is an integral resource to HE policy, and data from 2014/15 was used as part of the evidence base for the [Post-18 review of education and funding](https://www.gov.uk/government/publications/post-18-review-of-education-and-funding-independent-panel-report), published in May 2019. Running the next wave of SIES in 2019/20 will ensure that we have an up-to-date picture on student finances, capturing the post-2015 system under which maintenance grants were replaced with maintenance loans, and the total resource available to disadvantaged students increased by around 10 percent. 2019/20 data will also ensure that we can establish a robust baseline against which DfE can measure the impact of any future changes to the student finance system (e.g. any changes which may come about following recommendations made by the post-18 review)

## Research aims

The aim of the study is to provide an authoritative and objective report on the financial position of HE students in England and Wales in the academic year 2019/20.

The survey is expected to cover a representative sample of students to collect accurate estimates of their income and expenditure, debt, and experience of hardship – and how this differs depending on students’ background and circumstances. Data will be produced to allow comparisons to be made with previous surveys in the series, most importantly the 2014/15 survey.

The results of SIES 2019/20 will be used to:

1. provide an objective picture of students’ financial position in 2019/20;
2. identify groups of students who are in, or at risk of, financial hardship;
3. identify groups of students who benefit from targeted support measures;
4. provide an evidence base for policy making on student support;
5. monitor students’ financial position over time by comparing the results with previous surveys; and
6. (If there is space on the survey) measure students’ attitudes to finance and their financial wellbeing.

As the study will require a combination of extensive data collection and detailed analysis, prospective contractors may wish to consider forming a partnership of an established research agency with an academic or independent research institute, both with relevant experience.

## Methodology

The next wave of SIES is expected to use a broadly similar methodology to the two most recent studies. This consistency will enable us to compare students’ financial situations over time. SIES is split into two questionnaires. The first questionnaire includes questions on students’ income, with a small number of questions on expenditure also included. This survey is conducted online but students are able to complete on the telephone if they prefer (or can do a combination of the two). The second questionnaire is a self-completion diary where students are asked to complete an expenditure diary over the course of a seven day period.

As part of the 2019/20 survey, we would like to explore the feasibility and practicality of linking SIES data to administrative data, specifically Student Loan Company data on income from loans. Previous waves of SIES have asked students to provide self-reported data on the amount of tuition and maintenance loan funding that they receive. It is hoped that linking to administrative data could improve accuracy (although it is acknowledged that not all respondents will give consent for their survey data to be linked in this way).

## Timing

* Deadline for EOIs: **12/09/2019 at 23.59**
* Deadline for ITT: 2nd October 2019
* Contract award/Project start: 8th October 2019 (subject to data transfers)
* Pilot: December 2019 / January 2020
* Mainstage: March / April 2020
* Proposed End Date: Winter 2020

## Assessment criteria

* Experience of research topics to be covered
* Experience of conducting complex, mixed-mode surveys and of linking survey data to administrative datasets
* Experience of research with higher education students and providers
* Capacity and capability to deliver the project in the timescales indicated

Each of these criteria have equal weighting.

Expressions of interests submitted must be no more than 1000 words overall; this includes any website links. Anything longer will be disregarded.

| **Closing date for EOIs: 23.59 on Thursday 12th September****Send your EOI form to: Emma Drever** **Emma.drever@education.gov.uk** |
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## How to submit an expressions of interest

You must submit an expression of interest (EOI) in order to be considered to be invited to tender. To do so, please complete the NEW EOI Form which can be found under attachments. A submission of an EOI does not guarantee an invitation to tender and the Department does not routinely advise organisations that they have not been successful in being invited to tender. Feedback is however available on request.

All contracts are let on the basis of the Department’s Terms and Conditions, as also attached to this EOI. You are encouraged to check these before submitting your expression of interest, as these form part of your contractual obligations.

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