

International evidence on impact of funding linked to additional needs on participation and attainment by 16-19 year olds

Research report

December 2015

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Executive Summary

Aims

- The aim of the literature review was to identify the key international literature regarding the impact of funding on participation and attainment for 16-19 year olds, with a specific focus on students with 'additional needs'.
- In looking at how governments allocate their funding for young people and at the
 effects of such funding, the focus is on students with 'additional needs', defined
 as: pupils who are economically disadvantaged and need financial support to
 attend education, pupils with low prior attainment in need of extra support to
 succeed in education, and pupils with low level special educational needs and
 disability.

Methodology

- Key texts were identified through four main routes.
- A search of key online bibliographic databases was conducted, with a focus on UK-based and international publications, published in English language over the past ten years.
- A systematic exploration of academic journals was also conducted. A sample of journals were selected, including some generic and specialist ones. The research team browsed in a systematic manner through issues published since 2005
- The websites of a number of key policy and research organisations were searched.
- The research team also sought to identify some additional literature through an email survey of educational experts. Overall, the research team contacted about 160 individuals, who came from a range of institutions and countries.

Key findings

 In relation to the impact of funding on pupils who are economically disadvantaged and need financial support to attend 16-19 education, a number of texts were identified, which looked primarily at the impact of means-tested conditional grants. Findings in this area are consistent and show that this type of policy can have a significant impact on attendance, particularly in the case of girls, although impact on attainment is more mixed.

- It was also found that only a limited number of studies specifically consider the
 impact of funding in relation to young people with low prior attainment in need of
 extra support. Often, work in this area considers low prior attainment in relation to
 other social characteristics, such as socio-economic disadvantage or low-level
 Special Educational Needs (SEN).
- In relation to the impact of funding on pupils with low level SEN and disability, the literature search identified a significant dearth of information. In addition, only a small number of studies operate a distinction between 'low level' and 'high level' SEN.

Gaps in evidence and recommendations

- Extensive research and documentation are available about the post-16 sector, including about apprenticeship (which is not covered in this review). However, there is a clear dearth of information regarding the *impact* of funding, including in relation to the effects of different approaches and levels of funding. This is particularly the case when linked to the three 'additional needs' groups covered in this report.
- Evaluations often take place on an *ad hoc* basis. A more coordinated, coherent and comprehensive research and evaluation strategy should be established so that a better understanding of how funding impacts the three groups discussed in this review is gained.
- Work relevant to this review tends to concentrate in a few countries, such as the
 UK and Scandinavian countries. A study collecting information from other
 countries' Departments of Education, particularly of those sharing similar policy
 agendas, should be envisaged to facilitate the identification of 'good practices' and
 of work which may not be widely accessible.
- Most of the literature focuses on discrete programmes, where funding is directly linked to students or families (as can be the case with conditional cash transfer schemes). In contrast, limited evidence is available regarding how education institutions allocate the funding they receive from national or local governments and the impact it makes on those with 'additional needs'. Research in this area should also be encouraged.
- The views of parents and young people regarding the funding procedures and their impact are rarely discussed in the literature. Further research exploring their perspectives should be encouraged.
- Most studies appear to be cross-sectional in nature, with limited evidence deriving from longitudinal studies. The use of such methodology should be encouraged, so

that more evidence is available regarding longer-term effects on the educational and life outcomes of young people.

- When looking at the literature and considering the transfer of good practice, comparability issues should always be kept in mind. For example, phases of education are organised in different ways between countries and sometimes regions, and indicators used to identify the three groups discussed in this report are often constructed differently.
- Most of the existing research is not available to policy-makers and practitioners, whose institutions rarely subscribe to academic journals. The development of a webpage presenting research-informed summaries of evidence should be encouraged. This could take the form of an online database inclusive of a search tool.

Background and scope of the literature review

Since the 1980s, the wealth of education policies implemented across England have mostly sought to: raise standards and pupils' attainment, increase post-16 retention, and tackle the achievement gap between students from different socioeconomic backgrounds. In 16-19 education, these ambitions have been supported by two main types of intervention: 1) the reform of the apprenticeship and vocational qualification system, 2) the introduction of the Education Maintenance Allowance, paid to 16-19 year olds remaining in education or training and replaced since 2011 by the 16-19 Bursary Fund. However, the empirical evidence regarding the impact of such reforms has been described as 'mixed' and 'patchy' (Machin and Vignoles, 2006).

Ten years later, this literature review considers the international evidence available regarding the impact of funding linked to additional needs on participation and attainment by 16-19 year olds. The review was conducted over the course of about a month (between June and July 2015). It was initially going to concentrate on literature from the past five years, as this is an area of frequent policy changes, including in England where, in the aftermaths of the Wolf review of vocational education (Wolf, 2011), significant changes have been introduced in terms of how 16-19 educational institutions are funded. However, in the face of a clear dearth of research in this area, it was decided to cover a ten-year period. In looking at how governments allocate their funding for young people and at the effects of such funding, the focus is on students with 'additional needs', defined in the Department for Education's tender as:

- pupils who are economically disadvantaged and need financial support to attend education,
- pupils with low prior attainment in need of extra support to succeed in education,
- and pupils with low level special educational needs and disability.

The structure of the report reflects this focus. Section 1 describes the methodology adopted to conduct the literature review, while sections 2, 3 and 4 look in turns at the literature regarding the impact of funding on the three groups of pupils listed above. Section 5 concludes by providing an overview of the existing evidence and of areas in which evidence is missing. Additionally, recommendations are provided regarding how this dearth of evidence could be addressed.

Methodology

The aim of the literature review was to identify the key international literature concerning the impact of funding linked to additional needs on participation and attainment for 16-19 year olds, with a specific focus on students with 'additional needs'. This was achieved through four main routes:

1) A search of key online bibliographic databases

The bibliographic search focused on UK-based and international publications, published in English language over the past ten years. The research team looked at ERIC, Web of Science, British Education Index and Education Abstracts, starting with a key word search, identified at the outset of the project, and snowballing by looking at the reference lists of the articles identified through the database search. In the later stages of the search, a more targeted search was conducted (for example, looking for specific programmes or for synonyms of the key words used in the initial search). Further details regarding the initial bibliographic search are provided in the Appendix.

2) A systematic exploration of academic journals

Following the completion of the search of bibliographic databases, a sample of journals was selected, including some generic and specialist ones. The research team browsed in a systematic manner through issues published since 2005. These journals were selected because of their reputation for publishing high-quality educational research and because of their specialism.

3) A search of the websites of key policy and research organisations

In parallel to activities 1 and 2, the websites of several policy and research organisations were searched, including those of: the Department of Education (DfE) (to gain a better understanding of the policy background and to facilitate the identification of some key words for the literature search), the Education Endowment Foundation (EEF), the European Commission (specifically the Education & Training section of the Directorate General for Education and Culture and the Eurydice section of the Education, Audiovisual and Culture Executive Agency), the Educational Policies that Address Social Inequity project (EPASI), and the Organisation for Economic Co-operation and Development (OECD). The search included a systematic exploration of the main pages of these websites and a word search similar to what was done for the search of the online bibliographic databases.

¹ The sample included the following journals: American Educational Research Journal; British Educational Research Journal; Journal of Education Policy; Journal of Research in Special Education Needs; and Journal of Special Education.

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4) An email survey of experts

The research team sought to identify some additional literature by circulating an email to their professional networks and to researchers identified through the early stages of the literature search as working in this area. They were asked to suggest relevant publications and to recommend individuals with relevant expertise whom the team could contact. Overall, the research team contacted about 160 individuals, who came from a range of institutions and countries including: Belgium (Flanders and Wallonia), Bulgaria, Canada, Czech Republic, Denmark, France, Germany, Greece, Ireland, Malta, Spain (Cataluña), Sweden, Switzerland, and the UK regions. A copy of the email survey invitation is provided in the Appendix.

The majority of the outputs were identified through activity 1) and, to a lesser extent, through activity 4). A table of the main studies identified through the review is included in the Appendix.

Impact of funding on pupils who are economically disadvantaged and need financial support to attend 16-19 education

The Education Maintenance Allowance (EMA) was introduced in England in 1999 and rolled out across the UK in 2004. It consisted of a means-tested financial incentives paid to students from deprived socioeconomic backgrounds under the proviso that they participate in post-16 education or training. Evaluations have shown that the scheme resulted in an increase in participation among students from the targeted groups (Callanan et al, 2013, 2014; Dearden et al, 2009). In 2011, it was replaced by a Bursary Fund, made of two components: Defined Vulnerable Group bursaries (with payments made directly to students, in ways similar to the EMA) and Discretionary Bursaries (allocated to schools and which they can use in a discretionary manner).

However, in Northern Ireland, Scotland and Wales, the Education Maintenance Allowance was retained. In 2013, the Welsh Government commissioned an independent evaluation of its equivalent schemes. Using a mixed-method approach combining a secondary analysis of datasets and the collection of primary qualitative data, the authors found that 'the EMA supports and contributes towards a range of Welsh Government policies which are geared towards widening access to education, reducing the rate of young people who are not in education, employment or training (NEET) and addressing the current link between poverty and educational attainment' (Old Bell 3 Ltd, 2013: 4). The scheme was found to have a positive impact on retention rate (particularly in FE), attendance and punctuality, although a number of methodological issues were raised (e.g. design of a control group). However, no evidence of an impact of the EMA upon progression into Higher Education or on attainment was found, suggesting a need for further research, and possibly the use of a different methodology (e.g. the use of longitudinal studies), for conclusions to be drawn.

Dearden et al (2011) observe that, in the recent years, means-tested conditional grants (also known as conditional cash transfer or CCT) have been introduced in a number of countries, which have favoured this approach to increase retention and attainment (rather than, for example, simply raising the leaving school age). In countries from the Global South, the scope of this intervention has tended to go beyond education, and to be part of a wider and integrated strategy ultimately aiming to tackle poverty through payments made to families. Conditional cash transfer schemes have been launched in Colombia, Honduras, Jamaica, Mexico, Nicaragua and Turkey (Rawlings and Rubio, 2005). Two of the oldest programmes (Mexico-based PROGRESA, now Oportunidades, and Colombia-based Familias en Acción) have been the subject of several evaluation and research publications, including quantitative studies, based on the use of randomized trials, and qualitative ones, using a more ethnographic approach. Despite variations between schemes which cannot be covered here, findings are consistent and identify a significant positive effect on students' retention, with the biggest impact on girls (Attanasio et al,

2006, 2008, 2013; Bey, 2008; Gantner, 2007). Financial rewards vary between programmes (and sometimes, within programmes, when several types of incentives coexist, each of these rewarding different behaviours).

Countries from the Global North have also adopted cash transfer programmes, albeit more recently. The City of New York launched in 2007 a three-year long experimental and privately-funded programme, inspired by Oportunidades and coordinated by a private, non-profit organisation. Like its Mexican counterpart, Opportunity NYC: Family Rewards conditioned financial incentives to a number of education, health and workrelated demands. In its first and second year, the programme included a set of 22 incentives (with amounts paid to families ranging in value from 20 to 600 dollars), so as to assess which ones would prove the most impactful, before being scaled down in its third year. As far as education was concerned, funding was provided to families based on school and teacher-parent meeting attendance, as well as attainment, so as to encourage the development of human capital and to tackle intergenerational poverty. The evaluation of the programme, which drew on a randomized control trial, showed a substantial impact, including in terms of reducing poverty and in terms of education, health and work-related outcomes. It was found to have a stronger effect at high school level, particularly in terms of attendance rate (which rose at this level by 5 percentage points). Its impact in terms of attainment was more mixed, depending on previous attainment and the age group (see, e.g., Riccio, 2010: 3). However, the evaluation pointed to the fact that the rate in attendance itself may have a longer term impact on attainment, which was not however assessed by the evaluation due its timescale (Riccio. 2010; Riccio et al, 2013).

Impact of funding on pupils with low prior attainment in need of extra support to succeed in education

The literature search revealed that only a limited number of studies specifically consider the impact of funding in relation to young people with low prior attainment and in need of extra support (Hodgson & Spours, 2014; Garthwaite, 2013; Tomlinson, 2013). In most cases, the literature considers low prior attainment in relation to other social characteristics, such as socio-economic disadvantage or low-level SEN (Tomlinson, 2013).

The great variability observed in the literature concerning the identification criteria used for young people with low prior attainment and the limited number of studies specifically considering the impact of funding schemes on the educational performance and participation of this group do not allow us to draw any firm conclusions in this area. Further research is needed in order to shed light on the impact that funding policies have on the short-term and long-term educational and life outcomes of these young people.

Impact of funding on pupils with low level special educational needs and disability

The search of the literature revealed limited research evidence concerning the impact of funding on participation and attainment of 16-19 year olds with low level of SEN in the UK (Paris & Bryant, 2015). A similar pattern was observed in other national contexts. In addition, only a small number of studies operate a distinction between 'low level' and 'high level' SEN. For example, some literature explores the impact of SEN funding for young people with Autism Spectrum Disorder (ASD), without distinguishing between these two categories (Friedman et al, 2013; Pellicano et al, 2014).

A study conducted for the European Agency for the Development of Special Needs Education compared the ways in which SEN was funded in 17 European Countries (European Agency, 2013). Although the focus of the study was not specifically on funding for 16-19 year olds with low level SEN, the results showed that countries which tend to decentralise SEN funding (such as Scandinavian countries) expressed the highest levels of satisfaction about the ways in which such funding was used. The decentralisation of funding in the Scandinavian countries mainly involved the distribution of funding at the municipal level, with schools and municipalities having relatively high levels of autonomy regarding the ways funding could be used to support young people with SEN. The same study also showed that countries where SEN was funded on a student-led level (e.g. Northern European countries, including Austria and Germany) tend to have a higher proportion of students identified as having SEN as a result, and noted the financial implications of it.

The literature search also points to the limited evidence available regarding the outcomes achieved through the allocation of additional resources in the case of pupils with low level SEN and disability (Ebersold et al, 2011). Additionally, cross-national comparisons need to take into account the fact that there can be some considerable intra-national variations in the way SEN and disability are funded. For example, this may vary depending on the type of disability. In some countries, such as the US, where evidence in this area is emerging, there are also considerable variations between states (Fletcher-Campbell et al, 2003).

Overview of the literature and recommendations

- 1) Extensive research and documentation are available about the post-16 sector, including about apprenticeship (which is not covered in this review). International institutions, such as the OECD or the European Commission provide extensive descriptions of national education and training systems. However, there is a clear dearth of information regarding the *impact* of funding, including in relation to the effects of different approaches and levels of funding; this is particularly the case when linked to the three 'additional needs' groups covered in this report. Extant evaluations often take place on an *ad hoc* basis. A more coordinated, coherent and comprehensive research and evaluation strategy should be established so that a better understanding of how funding impacts the three groups discussed in this review is gained.
- 2) Work relevant to this review tends to concentrate in a few countries, such as the UK and Scandinavian countries. While this may reflect the fact that the literature search was mostly conducted in English-language, a search of the literature in another language (French) also brought limited results. A study collecting information from other countries' Departments of Education, particularly of countries sharing similar policy agendas, should be envisaged to facilitate the identification of 'good practices' and of work which may not be widely accessible (for example, internal evaluation reports).
- 3) Most of the literature focuses on discrete programmes, where funding is directly linked to students or families (as can be the case with conditional cash transfer schemes). In contrast, limited evidence is available regarding how education institutions allocate the funding they receive from national or local governments and how, ultimately, the funding may benefit the three 'additional needs' categories discussed in this report, particularly when it is not ring-fenced for these groups. Research in this area should also be encouraged.
- 4) The views of parents and young people regarding the funding procedures and their impact are rarely discussed in the literature. This may be related to dominant paradigms and methodologies within economics education as a significant proportion of the literature appears to arise from this field. Students and families are competent agents whose behaviour and views can affect policy outputs and social processes (Winter, 2006) and further research should consider their perspectives.
- 5) Most studies in this area appear to be cross-sectional in nature, with limited evidence deriving from longitudinal studies. This dearth of longitudinal studies may reflect the frequent policy changes which characterise 16-19 education in many countries, as evaluations are usually attached to a specific policy. The use of such methodology should be encouraged, so that more evidence becomes available regarding longer-term effects on the educational and life outcomes of young people.

- 6) When looking at the literature and considering the transfer of good practice, comparatibility issues should always be kept in mind. For example, phases of education are organised in different ways between countries and sometimes regions. The grouping of students also follows different rules. In particular, indicators used to identify the three groups discussed in this report are often constructed differently. Regarding the case of students with 'low level special educational needs and disability', it is particularly problematic that only a limited number of studies operate a distinction between 'low level' and 'high level' SEN.
- 7) Most of the existing research is not available to policy-makers and practitioners, whose institutions rarely subscribe to academic journals. As a result, these groups often rely on publications which have not been peer-reviewed and may not draw on a sufficiently robust methodology and theoretical framework (although we acknowledge that peer-reviewing does not automatically results in higher quality) or on pre-conceptions (Sosu & Ellis, 2014). The development of a webpage presenting research-informed summaries of evidence should be encouraged. This could take the form of an online database inclusive of a search tool. To our knowledge, there is currently no such service with a focus on 16-19 provision and the impact of funding. The information provided should be contextualised, for example through the writing up of case studies, as 'what works' is always context-dependent.

Appendix

Glossary

ASD-Autism Spectrum Disorder

DfE-Department for Education

EMA-Education Maintenance Allowance

EFA-Education Funding Agency

EEF-Education Endowment Foundation

EPASI-Educational Policies that Address Social Inequity

FE-Further Education

NEET- Not in Education, Employment or Training

OECD-Organisation for Economic Cooperation and Development

SEN-Special Educational Needs

SES-Socio-Economic Status

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Attanasio, O., Kugler, A. & Meghir, C. (2008) Training disadvantaged youth in Latin America: Evidence from a randomized trial, *NBER Working Papers*, 13931, National Bureau of Economic Research.

Attanasio, O., Meghir, C. & Santiago, A. (2012) Education choices in Mexico: Using a structural model and a randomized experiment to evaluate PROGRESA, *Review of Economic Studies*, 79(1), 37-66.

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Campbell, F. F, Pijl, S. J, Meijer, C., Dyson, A. and Parrish, T. (2003) Distribution of Funds for Special Needs Education, *International Journal of Educational Management*, 17(5), 220–233.

Crawford, C., Sibieta, L. and Vignoles, A. (2011) *Special Educational Needs Funding System: Role of incentives*. Report no. 11/04. Bristol: Centre for Understanding Behaviour Change.

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Literature search strategy

A set of key words were identified at the beginning of the project, as listed in Table 1 below, and were used to conduct the relevant literature searches.

The main databases used to conduct the structured searches included ERIC, Web of Science, British Education Index and Education Abstracts, starting with a key word search, identified at the outset of the project, and snowballing by looking at the reference lists of the articles identified through the database search. A list of key words searched is provided in table 1 below. Additionally, relevant searches were conducted in Google Scholar. The abstracts or the summaries of the retrieved documents were reviewed and the most relevant ones were selected and read in more detail. The following websites of key stakeholder organisations in the area were also searched for relevant literature:

Department for Education

https://www.gov.uk/government/organisations/department-for-education

• Education Endowment Foundation

https://educationendowmentfoundation.org.uk/

Educational Policies that Address Social Inequality

http://www.epasi.eu/

European Commision: Education, Audiovidual and Culture Executive Agency
 http://eacea.ec.europa.eu/index_en.php

Joseph Rowntree Foundation

http://www.jrf.org.uk/

The Nuffield Foundation

http://www.nuffieldfoundation.org/

Organisation for Economic Cooperation and Development.

http://www.oecd.org/

Email template

Dear Colleagues

We are currently conducting a project for the DfE, titled *International evidence on impact* of funding linked to additional needs on participation and attainment by 16-19 year olds. In this context, 'additional needs' refers to:

- Pupils with low level special educational needs and disability,
- Pupils with low prior attainment and who need extra support to succeed in education,
- Pupils who are economically disadvantaged and need financial support to attend education.

We are in the process of reviewing the literature in this area. Our focus is on countries other than England (including oversea countries, as well as Wales, Scotland and Northern Ireland), although we are also interested in considering work about England.

As well as conducting a bibliographic search, we are contacting a number of academics working in related fields to ensure that we do not omit key work in this area. If you have written (or are aware of) any relevant work, we would be very grateful if you could provide us with a reference. If that does not apply to you, we would be very grateful if you could recommend a colleague who is familiar with this field of research. Individual contributions will be acknowledged in the final report (unless, of course, you object).

Unfortunately, we are working towards a very tight deadline as the report is due on 30 July. We would be very grateful if you could email us any relevant information by **Friday 10 July** (and if possible, earlier than that).

Feel free to contact us if you have any question.

Many thanks for considering our query.

Best wishes

Dr Marie-Pierre Moreau (PI) and Dr Olympia Palikara (Co-I)

Table 1: List of key words used for literature search

Impact	Funding	16-19 education	Low level special educational needs and disability	Low prior attainment	Economically disadvantage	Countries
Effect	Bursary funding	Post-16 education	Low level special needs	Low educational outcomes	Free school meals	Wales
	Funding arrangements		Special educational needs	Low educational achievement	socio-economic status	Scotland
	Funds		Special needs	Low educational attainment	Low income	Northern Ireland
	Core funding		Disability	Low pupil progress	Poverty	Australia
	Funding system					USA
						Scandinavian countries
						Norway
						Sweden
						Denmark
						Finland

A combination of these keywords was used to conduct the initial bibliographic search. Once this had been completed, a more targeted search was conducted (using for example the names of specific schemes or using synonyms or equivalent terms).

Table 2: Key texts identified in the literature search concerning the impact of funding on attainment and participation of 16-19 year olds

and participation	on of 16-19 year olds
Key Texts	Main themes
Attanasio, O., Meghir, C. & Santiago, A. (2012) Education choices in Mexico: Using a structural model and a randomized experiment to evaluate PROGRESA, <i>Review of Economic Studies</i> , 79(1), 37-66.	 Evaluation of PROGRESA program in Mexico. Significant positive effect on students' retention, with the biggest impact on girls.
Campbell, F. F, Pijl, S.J, Meijer, C., Dyson, A. and Parrish, T. (2003) Distribution of funds for Special Needs Education, <i>International Journal of Educational Management, 17(5)</i> , 220–233.	 The impac of SEN funding is considered with evidence from relevant studies conducted in the USA, the Netherlands, and the UK. Focuses (though not exclusively) on the effect of funding on 16-19 young people with low level SEN.
Ebersold, S., Schmitt, M. J. & Priestley, M. (2011) <i>Inclusive education for young disabled people in Europe: Trends, issues and challenges.</i> Leeds: University of Leeds, Centre for Disability Studies, Academic Network of European Disability Experts.	 A synthesis of the literature concerning inclusive education for young people with SEN in a number of European countries. Young people with SEN have fewer chances than their peers to enter and progress within higher education in Europe. The dearth of data concerning the impact of funding policies on the outcomes of young people with SEN is
European Agency for Development in Special Needs Education (2013)	Comparison of the ways in which SEN are funded in 17 European Countries.

Key Texts	Main themes
Organisation of provision to support inclusive education: Literature review, Odense: European Agency for Development in Special Needs Education.	 Countries that tended to de-centralise the SEN funding more satisfied about the ways funding was used (i.e Scandinavian countries). Countries with SEN funded on student-led level tended to have higher numbers of istudents with SEN identified (i.e Northern European countries).
Gantner, L. (2007) PROGRESA: An integrated approach to poverty alleviation in Mexico, In: Pinstrup-Andersen, P. and Cheng, F. (Eds) Food policy for developing countries: Case studies. Available online: http://cip.cornell.edu/dns.gfs/1200428168 (accessed 15 July 2015)	 Evaluation of Mexico-based PROGRESA, now Oportunidades, one of the oldest conditional cash transfer programmes. Significant positive effects reported on students' retention, with the biggest impact on girls.
Old Bell 3 Ltd (2014) Evaluation of the Education Maintenance Allowance (EMA) Report. Cardiff: Welsh Government. Rawlings, L. & Rubio, G. (2005) Evaluating the impact of conditional cash transfer programs: Lessons from Latin America, The World Bank Research	 Evaluation of the Education Maintenance Allowance in Wales. The scheme had positive impact on retention, attendance and punctuality. No evidence of an impact upon progression into Higher Education or on attainment. Impact of conditional cash transfer for pupils with low level SES. Programme introduced in a number of countries, including Colombia
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Key Texts	Main themes
Conditional Cash Transfers in New York City. The Continuing Story of the Opportunity NYC-Family Rewards Demonstration. New York: MDRC.	Significant effect on attendance, more mixed effect on attainment.
Tomlinson, S. (2013). Social Justice and Lower Attainers in a Global Knowledge Economy, <i>Social Inclusion</i> , 1(2), 102-112	 Research study on the views of personel concerning effect of arrangements post- 16 for low achieving students.



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Reference: DFE-RR484

ISBN: 978-1-78105-517-5

This research was commissioned under the under the 2010 to 2015 Conservative and Liberal Democrat coalition government. As a result the content may not reflect current Government policy. The views expressed in this report are the authors' and do not necessarily reflect those of the Department for Education.

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