

## 16 to 19 Bursary Fund summary: 2016 to 2017

The 16 to 19 Bursary Fund provides financial support to help students overcome specific barriers to participation so they can remain in education.

There are 2 types of 16 to 19 bursaries:

- a vulnerable bursary of up to £1,200 a year for young people in one of the defined vulnerable groups
- discretionary bursaries which institutions award to meet individual needs, for example, help with the cost of transport, meals, books and equipment

Institutions are responsible for managing both types of bursary. Students who want to apply for support from the bursary fund should contact their chosen institution as soon as possible to make an application.

To be eligible for either type of bursary students must:

- be aged over 16 and under 19 at 31 August 2016
- meet the residency criteria in EFA 2016 to 2017 academic year funding regulations for post-16 provision
- be participating in provision that is subject to inspection by a public body which assures quality (such as Ofsted), the provision must also be either
  - funded directly by EFA or by EFA via a local authority
  - otherwise publicly funded and lead to a qualification (up to and including Level 3) accredited by Ofqual or pursuant to Section 96 or the Learning and Skills Act 2000
  - a 16 to 19 traineeship programme

To be eligible for the vulnerable bursary, students must be in one of the defined vulnerable groups:

- in care
- care leavers
- in receipt of Income Support, or Universal Credit in place of Income Support, in their own right
- in receipt of Employment and Support Allowance or Universal Credit and Disability Living or Personal Independence Payments in their own right

Institutions draw down funding (by submitting a funding claim) for vulnerable bursaries from the Student Bursary Support Service (SBSS) when they have identified students who meet the [vulnerable bursary](#) criteria.

To be eligible for the discretionary bursary, students must be facing financial barriers to participation and need help to stay in education.

Institutions receive discretionary bursary funding [allocations](#) from EFA which they manage directly, deciding which students are eligible for help and how much they receive, in line with this guide and their own policies.

In the 2014 to 2015 academic year additional funding for free meals for post-16 students attending further education funded institutions was introduced to provide parity with those young people attending school sixth-forms.

In the 2016 to 2017 academic year, EFA is removing the ring fence between the free meals in further education allocation and the discretionary bursaries allocation. The 2 allocations will be calculated separately by EFA, but institutions will be given a single overall allocation (where they are in scope for both schemes) to maximise flexibility.

Institutions are reminded, however, that free meals in further education remains an entitlement for those students who meet the eligibility criteria. Institutions must ensure they manage the single allocation appropriately to ensure all eligible students who successfully make an application are provided with a meal in line with the [free meals guide](#) .

## **Eligibility criteria: all bursaries**

This section covers the basic eligibility requirements of the scheme (which mirrors eligibility for publicly funded 16 to 19 education and training). It applies to both types of bursary – discretionary and vulnerable.

### **Age**

To be eligible to receive a bursary in the 2016 to 2017 academic year the student must be aged over 16 and under 19 at 31 August 2016.

If a student turns 19 during their programme of study, they can continue to receive the bursary until the end of the academic year in which they turn 19, or to the end of the programme of study, whichever is sooner.

The only students aged 19 or over who are eligible to receive a bursary from the 16 to 19 Bursary Fund are those who have an Education, Health and Care Plan (EHP) due to their high needs and who attend a special post-16 institution (SPI). These students can receive a discretionary bursary while they continue to attend education, as long as their eligibility continues and the SPI considers they need the additional support in order to continue their participation. No students aged 19 or over are eligible for the vulnerable student bursary.

Examples of how the age eligibility criteria apply:

1. A student starts an FE study programme on 1 September 2016, and his nineteenth birthday is on the same day. He is eligible for the bursary for the full academic year (as long as he meets the other eligibility requirements) because he was 18 on 31 August 2016. He will only be eligible for the bursary in the 2016 to 2017 year even if he continues on the same study programme in the following academic year.
2. A student has been in receipt of a discretionary bursary whilst studying for her A levels in the 2015 to 2016 academic year. She turns 19 and continues to receive the bursary until the end of that academic year. She fails one of her exams and wants to repeat it in 2016 to 2017. She will not be eligible for the bursary in that year as she is already 19 on 31 August 2016.

## **Residency**

Students must meet the residency criteria in [EFA funding regulation](#) for post-19 provision in the 2016 to 2017 academic year. This document also specifies the evidence institutions must see to confirm eligibility.

### **Accompanied asylum seeking children (under 18 with an adult relative or partner)**

Generally, asylum seekers are not entitled to public funds. Accompanied asylum seeking children (ie those under 18 with an adult relative or partner) and those aged 18 and above are entitled to education, but not to public funds. If they are destitute they can apply to the Home Office for suitable housing and cash for essentials, but they are not eligible for other income.

As long as an asylum seeker has not had their application refused, institutions can provide in kind student support such as course related books, equipment or a travel pass. Under no circumstances should an institution give cash to any asylum seeker who is not an unaccompanied asylum seeking child (UASC).

### **Unaccompanied asylum seeking children**

Unaccompanied asylum seeking children do not receive cash support from the Home Office and are the responsibility of the local authority. They are treated as looked after children and are eligible for a vulnerable bursary ('in care' group).

When these young people reach legal adulthood at age 18, institutions must consider their immigration status. If the asylum claim is decided in their favour the local authority must provide them with the same support and services as they do care leavers. As such, they will continue to be eligible for a vulnerable bursary until they reach the upper age limit.

Where an asylum claim is not supported, the individual may not be able to stay legally in the UK. When asylum claims have been fully heard and the appeals rights exhausted, an individual has no entitlement to public funds. There are a few exceptions where the withdrawal of support would be seen as a breach of human rights.

### **Eligible education provision**

To be eligible for the 16 to 19 Bursary Fund students must be participating in provision that is subject to inspection by a public body that assures quality (for example Ofsted). The provision must also be either:

- funded directly by EFA or by EFA via a local authority
- funded or co-financed by the European Social Fund
- otherwise publicly funded and lead to a qualification (up to and including level 3) accredited by Ofqual or is pursuant to Section 96 of the Learning and Skills Act 2000
- a 16 to 19 traineeship programme

Students on distance learning study programmes are not automatically excluded from applying for a bursary. However, institutions should only award a bursary where there are

specific financial barriers which prevent the student from participating in the programme. This is because most students on distance learning provision do not have the kinds of costs which the bursary fund is intended to cover, for example, transport, equipment and uniforms.

Where an institution identifies that a student on a distance learning programme does require financial help, EFA advice is to provide support through in-kind help rather than cash payments where possible. For example, lending equipment or funding a temporary travel pass to enable the student to attend exams or university interviews.

## **Specific groups of students: eligibility questions**

Common questions from institutions about whether particular groups of students are or are not eligible for the 16 to 19 Bursary Fund are addressed in this section.

### **Students aged under 16**

Institutions should generally only pay bursaries to students aged 16 or above. However, in exceptional circumstances institutions may use their discretion to pay bursaries to younger students, for example, where a student is following an accelerated study programme. This does not apply to 14- to 16-year-olds attending college as part of their key stage 4 programme.

### **Students aged under 19 studying higher education qualifications**

The 16 to 19 Bursary Fund is intended to help students with the costs of continuing in further education. Students aged under 19 who are enrolled on higher education qualifications are not eligible for support from the scheme. Separate student finance arrangements are in place to support students in higher education. Young people can find out more details at the [student finance website](#).

### **Students aged 19 and over at 31 August 2016 in the 2016 to 2017 academic year**

Students who are aged 19 and over on 31 August 2016, whether they are starting a new study programme or continuing on a programme from the previous academic year, are not eligible for support from the 16 to 19 Bursary Fund. Students aged 19 and over may instead be able to access [Discretionary Learner Support provided by the Skills Funding Agency](#). Students should talk to their institution to establish what help may be available to them.

### **Students on apprenticeships and traineeships**

Students on apprenticeship programmes, or any waged training, are employed, rather than in education. They are not eligible for help from the 16 to 19 Bursary Fund.

Students on traineeships programme are non-waged. They are eligible to apply for help from the 16 to 19 Bursary Fund as long as all the other eligibility criteria are met.

### **Young offenders**

Young offenders can apply for a bursary if they:

- are serving a non-custodial sentence
- have been released early from a custodial sentence (except on temporary license)
- have been remanded to a non-secure institution

Young offenders cannot apply for a bursary if they:

- are serving a custodial sentence
- have been released from a custodial sentence on temporary license
- have been remanded to a secure institution

Institutions should provide in-kind support to young offenders rather than cash wherever possible.

### **Prince's Trust Team Programme**

The Prince's Trust Team Programme is for 16- to 25-year-olds. It is a 12-week course designed to improve confidence, motivation and skills. Each team aims to recruit a mix of 16- to 25-year-olds of different abilities and backgrounds, including employees sponsored by their employers. The teams are funded by EFA, but are run and managed locally by institutions in partnership with the Prince's Trust.

Non-employed students aged 16 to 19 will be eligible to receive the bursary while participating in a Prince's Trust Team Programme in the same way as any other student participating in an eligible, publicly funded course. The bursary cannot be used to subsidise any delivery costs of the programme.

### **Residents of Scotland**

If a student lives in Scotland and travels to study at an English institution they should approach their home local authority in Scotland to make an application for [Scottish Education Maintenance Allowances](#) (EMA). These students are not eligible to apply for support from the 16 to 19 Bursary Fund.

If a student lives in England and travels to study at a Scottish institution they should approach their home local authority in England to make an application for a discretionary or vulnerable bursary. These students are not eligible for Scottish EMA.

Students from England who live in Scotland on a temporary basis for the purposes of education, for example at a residential college, will be considered ordinarily resident in Scotland and should apply to their host local authority in Scotland for Scottish EMA. These students are not eligible for support from the 16 to 19 Bursary Fund.

These rules governing financial support for cross-border students were agreed with the Scottish government and reflect the policy aim of both the 16 to 19 Bursary Fund and the Scottish EMA, which is to ensure that students are not deterred from studying post-16 by financial barriers. Neither scheme is intended to, or should be used to incentivise students to cross the border to participate at either Scottish or English institutions.

### **Residents of Wales**

If a student lives in Wales and travels to study at an English institution, they should approach their home local authority to make an application for [Welsh EMA](#).

They may also apply to their English institution for help from the 16 to 19 Bursary Fund discretionary bursary, but are not eligible for a vulnerable student bursary. Consideration must be given to any support they are receiving from Wales before any bursary award is made.

If a student lives in England and travels to study in Wales, the source of financial support they should apply for depends on the type of institution they are attending which means:

- if they attend an FE college they should apply for discretionary student support from their college, via the Welsh institution's Financial Contingency Fund
- if they attend a special college or school sixth-form they should approach their home local authority in England to apply for a discretionary bursary from the 16 to 19 Bursary Fund

All students living in England and travelling to Wales to study, regardless of what type of institution they attend, who are in one of the defined vulnerable groups are eligible for a vulnerable student bursary and should approach their home local authority in England to make an application.

## **Vulnerable bursaries**

Students who are in one or more of the groups below can apply for a vulnerable bursary of up to £1,200 (if they are participating on a study programme that lasts for 30 weeks or more - institutions should pay a pro-rata amount for students on study programmes of less than 30 weeks). This reflects that students in these groups may need a greater level of support to enable them to continue to participate.

The defined vulnerable groups are students who are:

- in care
- care leavers
- getting [Income Support](#) (IS), or [Universal Credit](#) (UC) in place of Income Support, in their own right
- getting [Employment and Support Allowance](#) (ESA) or Universal Credit (UC) and Disability Living Allowance (DLA) or [Personal Independence Payments](#) in their own right

Institutions are reminded that students do not need to live independently of their parents to be eligible for a vulnerable student payment - they can claim ESA or UC in their own right while living in the parental home. Institutions may wish to remind parents (in any application form they use or on their websites) that they will not be able to continue to claim Child Benefit if the young person's claim for ESA succeeds.

It is the responsibility of the institution to assess if students are eligible to receive a vulnerable bursary payment and to retain evidence to support the decision. Institutions must submit a funding claim form to the SBSS to draw down funding for vulnerable bursaries.

The vulnerable bursary is payable for each academic year the student is in education or training, as long as they continue to meet the eligibility criteria of the scheme.

Institutions can pay a vulnerable student more than £1,200 if they assess they need extra help to remain in education. Any payments over the £1,200 should be paid from their discretionary bursary allocation or from their own funds.

## **Defining in care and care leavers**

For the purposes of the 16 to 19 Bursary Fund in care is defined as:

- children looked after by a local authority on a voluntary basis (section 20 of the Children Act 1989) or under a care order (section 31 of the Children Act 1989) - Section 22 of the Children Act 1989 defines the term 'looked after child'

A care leaver is defined as:

- either a young person aged 16 and 17 who was previously looked after for a period of 13 weeks consecutively (or periods amounting to 13 weeks), which began after the age of 14 and ended after the age of 16
- or a young person aged 18 or above who was looked after prior to becoming 18 for a period of 13 weeks consecutively (or periods of 13 weeks), which began after the age of 14 and ended after the age of 16

In legal terms these children are called relevant children or former relevant children.

## **Foster care, including privately arranged foster care**

A young person placed with a foster carer by the local authority, including where the foster carer is on the books of an independent fostering agency, is classed as looked after. They are therefore in a defined vulnerable group ('in care') and eligible for help from the vulnerable bursary.

A child who is privately fostered (in other words, a private arrangement is made between the parent and the person who will care for the child) is not classed as a looked after child and therefore not eligible for the vulnerable bursary.

In some instances a young person may have been in the care of the local authority and the care transferred to another party via a permanent form of fostering, for example a Special Guardianship Order. In these circumstances the young person is deemed to have left care and is now a care leaver. They are eligible for help from the vulnerable bursary as they are in a defined vulnerable group (care leaver).

## **Universal Credit**

Universal Credit (UC) is being rolled out across the country and will gradually replace Income Support and the Employment and Support Allowance as well as other benefits. Institutions may soon start to see students claiming vulnerable bursaries based on receiving UC instead of Income Support or the Employment and Support Allowance.

Universal Credit award notifications do not include any information on the benefits they replace. Institutions are advised to ask any student claiming a vulnerable bursary based on a UC award to confirm which benefit it has replaced in order to correctly identify which defined vulnerable group they fall into. Institutions are reminded that any student whose UC award is in place of Employment and Support Allowance must also be receiving Disability Living Allowance or its replacement, Personal Independence Payment, to be eligible for a vulnerable bursary.

If the student has been awarded Universal Credit to pay for housing costs (ie the UC is in place of Housing Benefit), the student is not eligible for a vulnerable bursary unless they also qualify under any of the other benefits lists.

If the student is unsure why they have been awarded UC, institutions should treat it as a replacement for Income Support and identify them as being in this defined vulnerable group.

### **Identifying vulnerable students**

Institutions are responsible for identifying students in the defined vulnerable groups who are eligible for a vulnerable student payment.

Institutions should be aware that students who are in care or are care leavers might be reluctant to say so because of fear of being stigmatised and should ensure confidentiality to reduce these concerns. For example, institutions should tell students how their information will be used and shared and should not put students in a position where they are publicly identified as receiving a vulnerable bursary.

Institutions can take the initiative to identify students eligible for the vulnerable bursary by working with the local authority, looked after children's education services and care leaver services, to help and encourage students to apply for a bursary. Institutions and local authorities can also set up local data sharing agreements to share information on which students might be eligible and who should be supported to make an application. For example, institutions might want to ask their local authority if a young person received free school meals in year 11.

Examples of working with local stakeholders to identify eligible young people:

1. One college works with student advisors and the council's social services team to identify young people in the defined vulnerable groups. They encourage them to enrol at the college and apply for bursary funding.
2. One college works closely with local care teams. The teams refer young people in care or care leavers to them and encourage them to apply for vulnerable bursaries during enrolment. Clear and simplified information is available to all staff and students about vulnerable bursaries and is displayed throughout the college, on the college website and social media.
3. In one area, information on the 16 to 19 Bursary Fund is included in a bulletin to social worker contacts. This is published 3 times during the academic year, and ensures they are updated on the bursary.
4. Young people who might be eligible for a vulnerable bursary are identified by another college's Inclusion Manager who has developed links with local agencies working with vulnerable young people (for example YMCA, Social Services, Youth Offending

Teams). This helps the college identify eligible young people before enrolment so they become aware of the bursary early. They are then assisted in completing the application process

## **Evidence of eligibility**

Institutions must obtain proof that students are eligible (such as proof that they are in one or more of the defined vulnerable groups). Institutions should ask for, and retain copies for audit purposes of, evidence from the student. For example:

- for students in receipt of qualifying benefits, a letter from DWP which states the benefit the young person is entitled to (they must be entitled to the benefits in their own right), which should confirm that they can be in further education or training as some young people in receipt of benefits are not allowed to participate
- for students who are in care or a care leaver, written confirmation of their current or previous looked-after status from the relevant local authority - this is the local authority which looks after them or provides their leaving care services and could be a letter or an email, as long as it is clearly from the local authority

Only when the institution has verified and seen appropriate evidence that the student is eligible should they submit a funding claim to draw down funds from the SBSS. Please see also the 'drawing down funds' section.

## **Pro-rata vulnerable bursaries**

Defined vulnerable group students are eligible for a bursary of £1,200 if they are on a study programme which lasts for 30 weeks or more in the academic year. Eligible vulnerable group students who are on study programmes lasting for less than 30 weeks should be given a bursary on a pro-rata basis, so:

- a 30 week programme attracts a vulnerable bursary of £1,200 - if paid weekly, the bursary is  $£1,200 \div 30 = £40$  per week
- for example, if a student is on a programme which lasts for 10 weeks, the pro-rata bursary would be  $£40 \times 10 \text{ weeks} = £400$

Where a vulnerable student is on a part time course, the institution can make a reduction based on an hourly or daily rate. For example:

- a student is on a full-time course which lasts for 20 weeks - their bursary should be calculated at the rate of  $£40 \times 20 \text{ weeks} = £800$
- a student is on a part-time course (2 days a week) which lasts for 20 weeks - here, if the daily rate for the bursary is £8 ( $£40 \div 5 \text{ days} = £8$ ), then  $£8 \times 2 \text{ days} = £16$  a week;  $£16 \times 20 \text{ weeks} = £320$

## **Young people in the defined vulnerable groups not requiring bursary funding**

There can be cases where a young person is eligible for a vulnerable bursary because they are in one or more of the defined vulnerable groups, but their financial needs are already met and/or they have no relevant costs.

For example:

- a student is attending specialist residential provision where all their educational costs are covered
- a student is taking a distance learning programme and has no barriers to participation (such as no transport costs or meal costs)
- a student is in local authority care and all their educational costs are covered by the local authority

If a student in these circumstances still wants to claim a vulnerable student bursary, institutions can decide to award a reduced bursary or no bursary at all, reflecting their particular circumstances. If an institution decides to do this, they must ensure they explain why to all relevant parties.

## **Drawing down vulnerable bursary funding from the SBSS**

The funding for vulnerable bursaries is held centrally by the SBSS. Institutions should draw down vulnerable bursary funding on demand, whenever new students are identified who meet the vulnerable student criteria. Institutions can submit as many funding claims as they need to during the year.

Institutions should not hold onto claims until the end of the academic year and submit them retrospectively for payment. Regular submission of claims supports EFA in monitoring the number of eligible students and the funding required to support them. It also ensures that institutions do not need to use their discretionary bursary fund allocations to make vulnerable student payments.

To draw the funding down, institutions should complete and submit a funding claim. This must be done via the [SBSS online portal](#). Funding claim forms for the 2016 to 2017 academic year will be available from August.

Guidance notes on how to complete the form are built into it. If the institution needs further help, they can use the online web chat option or contact the SBSS Team on 0300 303 8610 or at [1619bursary@studentbursarysupport.co.uk](mailto:1619bursary@studentbursarysupport.co.uk).

All EFA funded institutions in receipt of a discretionary bursary allocation in the 2016 to 2017 academic year can submit a funding claim. Payment may be dependent on whether an institution has signed and returned their EFA funding contract.

Institutions delivering 16 to 19 traineeships through the Skills Funding Agency in 2016 to 2017 can also submit a funding claim.

Institutions who are not in receipt of a discretionary bursary allocation in the 2016 to 2017 academic year may submit a funding claim, however further checks will be made before funding can be released.

## **Students placed in independent provision**

Local authorities are responsible for submitting funding claims for vulnerable group students who are placed in independent provision. Independent education institutions should therefore

contact the relevant local authority to arrange for them to make a claim. It is the responsibility of the institution to verify that the student is in one or more of the defined vulnerable groups and to confirm this to the local authority prior to the local authority submitting the claim. This may be done by the institution sending the local authority a copy of the evidence they have seen or by the institution confirming to the local authority that they have seen evidence to verify eligibility.

If the claim is successful, funding will be issued to the local authority. Education institutions making claims through local authorities must ensure they liaise with the local authority finance contact to ensure that bursary funds are redirected to them.

## **Processing and payment of funding claims**

On receipt of a funding claim form, the SBSS will undertake checks to verify that institutions are eligible to claim, and that the claim has been completed correctly.

The SBSS will normally process a funding claim within 2 weeks and, if it is successful, will issue a funding statement which confirms the amount which will be paid. The statement can be viewed within the SBSS portal.

Payments for vulnerable student bursaries will only be made to the institution's bank account as held by EFA. No other bank account or method of payment is acceptable.

Any institution which needs to request a change to their bank account details must complete the [BAN1s form](#), or the [BAN1a form](#) (for academies). The form should be e-mailed to [StandingData.EFA@education.gsi.gov.uk](mailto:StandingData.EFA@education.gsi.gov.uk).

The SBSS will send a remittance advice for each successful funding claim. This document provides a breakdown by student ID (as given by the institution on the claim form) of the individual payments and the overall amount of funding which will be paid. It also includes a payment reference number. This will be the payment descriptor institutions will see on their bank accounts to allow easy tracking of payments.

If the SBSS tries to make a payment which cannot be verified by the BACS system (a 'BACS reject') the SBSS may need to contact institutions to check their bank account details. Payments will be delayed until the details have been verified.

## **Discretionary bursaries**

Discretionary bursaries are awards made to students by institutions to help overcome the individual barriers to participation a student faces, for example help with the cost of transport, meals, books and equipment.

It is for institutions to decide which students receive a discretionary bursary and how much they receive, depending on each student's circumstances. Institutions must not make blanket or flat rate payments to all students.

## **Setting and publishing eligibility criteria for discretionary bursaries**

Institutions set their own eligibility criteria for discretionary bursaries, but they must comply with the basic eligibility conditions of the scheme, set out in this guide. They should always ensure that their bursary policy is designed to ensure funding reaches those students who are most in need of financial support. Institutions must also comply with the requirements of the Equality Act 2010 when setting their criteria and must not discriminate against their students, either directly or indirectly, on the basis of their protected characteristics. Further information on the [Equality Act 2010](#) is available online.

Students who apply for help should be assessed individually and awarded a bursary based on their actual financial need. Institutions should document the assessment and retain the evidence obtained to support the amount awarded for audit purposes.

Institutions should publish a statement setting out how they will use their bursary fund. This should be done early enough for students to be able to use this information when deciding which post-16 institution they are going to attend. The eligibility criteria the institution uses must be clear and available to students and to EFA. The statement should clearly set out what costs relating to participation help will be provided with, such as transport, books and equipment, field trips and other course-related costs and whether it may also be used towards the costs of attending university interviews and open days.

Institutions should ensure that information about bursary funding – whether printed or on their websites - is kept up to date. Institutions may wish to work with local authorities, local youth groups and voluntary organisations to find ways to raise awareness of the bursary amongst young people, particularly those in the vulnerable groups. Institutions are also encouraged to work with their feeder schools to help ensure young people are aware of the help available to them post-16.

Institutions must manage the number and size of discretionary bursary awards to keep within their budget. They may decide to retain a small emergency fund from their allocation to support students who face exceptional circumstances during the academic year which impact on their ability to participate. EFA is not usually able to give more funds to institutions that run out of money during the year but institutions may choose to top up the bursary with their own funds to support students who are in need.

It is important to note that whilst the discretionary bursary can be used for transport costs where these are a barrier to participation, this does not replace the statutory duty on local authorities. Each local authority must set out in an annually published transport statement the arrangements they will make to facilitate the participation in education or training students of sixth-form age. The institution's bursary fund policy should take account of this.

### **Working with other local institutions**

Institutions are encouraged to work with other local institutions and the local authority to agree a common approach to the 16 to 19 Bursary Fund which takes account of the needs and circumstances of students locally. This could include institutions working together to identify and support eligible students, pool funds and centrally manage and administer the bursary.

Example of good practice include:

1. Schools across one area have a collaborative approach to the bursary fund supported by the local council. Post-16 teams in the schools help students to complete a simple application form which is passed to the local authority to assess against common criteria and arrange for awards to be made.
2. A group of colleges has created a Learning Executive with representatives from each local college. This meets regularly and sets a consistent approach to financial support across all colleges in the area.
3. Collaborative working between a college and local young carers services has improved the identification of students with caring responsibilities and encouraged them to apply for help from the Bursary Fund

### **Using household income and income bands to establish award levels**

As the discretionary bursary is targeted at those students who most need financial help, institutions will use household income in some way to help establish the amount of support they award to a student. This is often together with other factors, such as distance to travel from the institution, the number of dependent children in the household or whether the young person has additional responsibilities that may mean they need extra help, for example, they are a young carer or a parent.

This is an example of how one college uses income bands to establish the amount of support they give to an individual:

1. Band 1- annual household income of £16,190 or less. These students receive a contribution towards the cost of a bus pass if they live over 2 miles from college, payment for educational visits during the year, a contribution towards exam re-sits, and reimbursement of the cost of visiting university open days or interviews. Students with annual household incomes of less than £12,000, and between £12,000 and £16,190, receive tiered weekly payments subject to attendance and behaviour conditions.
2. Band 2 – annual household income between £16,190 and £20,817. These students receive the same allowances and contributions as Band 1 – but smaller contributions towards bus travel and educational visits
3. Band 3 – annual household income between £20,817 and £25,521. These students receive a contribution towards the cost of a bus pass if they live over 2 miles from college.

In another college:

1. Students with household incomes of less than £20,000 a year are eligible for discretionary bursaries. The college asks for proof of income from working families, and from non-working families, evidence of household benefits. The college also looks at individual family circumstances which may affect household income. For example, whether the young person lives in a single parent household, or if there are other children or young people living in the household.

In a school sixth-form:

1. Free school meal eligibility is used as the basis for eligibility for discretionary bursaries. The local authority provides data on year 11 free school meals eligibility for

all students enrolling in year 12. This saves on administration time, and means new students who may be eligible for bursaries are easily identifiable. Recognising that not all young people who are eligible for free school meals take up the entitlement, discretionary bursaries are also available for young people who were entitled but did not apply for them. Therefore, the criteria for discretionary bursaries are explained as i) free school meal take-up in year 11, or ii) free school meal entitlement in year 11 and 12 (such as the young person was entitled to free school meals but has not taken up the offer). Students are asked to provide evidence of receipt of benefits in their household.

Other examples of good practice include:

1. Some institutions use household income as the main eligibility criterion, using Tax Credits forms (TC602), evidence of income from self-employment, a P60, or 3 to 6 months' worth of bank statements as evidence.
2. Some use household income, but differentiate between students with different support requirements. Some students from low income households get more support depending on their needs such as bus or train passes, money for educational visits and contributions to the costs of university open days and interviews.
3. Some look at wider family circumstances, for example, whether the student is from a single parent family; whether there are a lot of other children in the family or where the student has additional responsibilities that may impact on the help they need, for example they are a young parent or a young carer.
4. Some use free school meals eligibility or receipt of benefits to decide who should get a bursary. Young people eligible for free school meals are not automatically entitled to a bursary, but it is a good indicator of family income
5. Others give more support to students doing courses with high costs. This includes courses where specialist equipment or clothes are required.

## **Young people with caring responsibilities**

Young people with caring responsibilities, for example, caring for a parent or other relative, may be reluctant to say so because of fear of being stigmatised. Institutions should ensure confidentiality to reduce these concerns, publicise the availability of help from the bursary fund and encourage young carers to apply.

When assessing young carers' eligibility for support from the bursary, institutions could consider whether they have had a young carers assessment (which includes questions about the support they need for education), whether they access a young carers service, whether their GP could confirm their caring role or whether they receive Carers Allowance. The publication [Student carers in further education](#) provides additional information institutions may find helpful.

Institutions are reminded that the assessment of household income can take into account any unearned income such as shares/investments, savings and rental income, when deciding whether students should receive a discretionary bursary.

Students can apply for a discretionary bursary more than once during the year. If this is because their circumstances have changed, the institution should re-assess them, including a

one-to-one interview to determine if there are any exceptional circumstances which need to be taken into account.

Students and/or their families should sign a declaration when they apply for either a vulnerable or discretionary bursary confirming that any evidence given in support of the application is correct and complete to the best of their knowledge and belief. Students and their families should be made aware that giving false or incomplete information which leads to incorrect or overpayment may result in the stoppage of any future payments and the recovery of any funds that have already been paid. It may also result in a referral to the police with the possibility of the student and/or their family facing prosecution.

There is no set limit for the amount of discretionary bursary that can be awarded to students. Institutions can award discretionary bursaries of £1,200 or more as long as they stay within their overall budget.

## **The impact of bursaries on DWP benefits**

Institutions may wish to highlight to students and parents that receipt of the 16 to 19 Bursary Fund does not affect their entitlement to any DWP income-related benefits. Bursaries are paid directly to students in addition to other means-tested benefits paid to families, such as Income Support, Jobseeker's Allowance, Child Benefit, Working Tax Credit and Housing Benefit and does not affect them.

However, if the student is in receipt of Disability Living Allowance (or Personal Independence Payments) and Employment Support Allowance or in receipt of Universal Credit, parents can no longer receive certain household/family benefits for that child, such as child benefit.

Bursaries must not be made as regular payments for living costs, as they would then be subject to the Social Security Amendment (Students and Income-related Benefits) Regulations 2000.

## **Paying bursaries to eligible students**

The discretionary bursary is intended to remove specific barriers to participation and so should be spent in a way that achieves this. Institutions can insist that students awarded bursary funds spend them on travel costs, meals during the day, equipment, or any other support that has been identified as necessary to enable the student to participate in education.

Institutions are free to decide how often both the vulnerable and discretionary bursary payments are made, taking into account the reason the bursary was awarded, the student's circumstances and local arrangements. We know from independent evaluation of the 16 to 19 Bursary Fund [report](#) that students prefer regular payments, especially weekly, as this helps them to manage their finances. It also means that if a student has a payment withheld due to failing to meet the conditions the institution has set (see also conditions ), they will not be left without support for a long period.

It is good practice to pay in-kind bursaries rather than cash where possible. This helps ensure that the bursary is spent for the reasons it was awarded and helps students to participate.

There are no restrictions on what in-kind payments can be but they might include travel passes, vouchers or credits for meals, required books and required equipment. Institutions can specify that students must return books and equipment at the end of their study programme to be used again by other students where appropriate.

If IT equipment, for example, a laptop or tablet is necessary, such as that the student cannot complete the study programme without it, it can be bought with bursary funds.

IT equipment should be returned once the student has completed the study programme for re-use by another student. If keeping the laptop or tablet on campus is the best way of ensuring that this happens, institutions have the right to set this as a condition. IT equipment must be insured by institutions and data cleansed before being re-issued to another student.

Where in-kind payments are made to students in the defined vulnerable groups, the value of the payments and how these have been deducted from the £1,200 should be made clear to the student.

Where bursary payments are paid directly to the student, it is good practice to pay by BACS transfer to their own bank account. The basic bank account (which students can open at age 16) allows BACS transfers and allows the student to withdraw money. More information on basic bank accounts can be found at [British Bankers' Association](#).

It is not recommended that large or lump sum bursary payments are made to students. Evidence from the independent evaluation of the 16 to 19 Bursary Fund is that students prefer more frequent payments (weekly) as they find them easier to manage.

EFA does not expect bursary payments to be paid into another person's account, except in exceptional circumstances where a student is unable to administer their own account. If the student is in one of the defined vulnerable groups and cannot manage their own funds, the institution will need to consider who will manage the bursary on the student's behalf.

Students and their families should direct all bursary payment queries, as well as queries about bursary eligibility to their institution.

Some examples of different payment approaches used by institutions are:

1. In one institution bursary awards to students in the vulnerable groups are tailored to individual needs. In some cases carers and social workers are involved in establishing the most appropriate way of getting the funding to the young person. At the beginning of term, if specialist equipment and/or a travel pass is needed, this is purchased by the college and the cost is deducted from the student's overall award. The remainder is paid to the student monthly or termly depending on need. In cases where a carer has responsibility for the young person's finances, meetings are set up with them to decide how payments should be made. In these situations, the funding can be paid to the carer every month, with the requirement that they will pass it on to the student.
2. In another institution vulnerable student bursaries are tailored for each recipient. Every student who qualifies for a vulnerable student bursary is offered an interview with a financial support advisor to decide together on the best way to deliver their support. Priority areas are addressed first; travel to college, equipment costs and

- support with studies. Additional expenditure such as university visits is also discussed, and where money remains, an amount is retained for unforeseen costs.
3. Students receiving a vulnerable student bursary receive £20 per week via BACS. Additional funds are also given at the start of their course so that students can pay for equipment and course-related items. Those in the vulnerable groups are also offered travel vouchers as part of their payments. The Student Services Team meet with the students regularly to help them with budgeting and identify any barriers to learning that could be overcome through bursary funds. A percentage of the total fund is kept back as a hardship fund to respond to emergencies that may arise later in the year

## **Conditions for receiving bursary funding**

Institutions should make receipt of a vulnerable or discretionary bursary conditional on the student meeting some agreed standards. These standards are set by the institution and could relate to attendance and standards of behaviour. The institution should ensure that any standards they set are clear, accessible and understood by students.

Evidence that a student has seen and agreed to the conditions, for example, an agreement signed by the student and a signed declaration which forms part of the institution's bursary application form, should be retained for audit.

Where there are concerns with attendance or behaviour, it is good practice to talk to the student about the issue. Institutions can withhold payments if a student does not meet agreed standards, but they should always consider the individual circumstances of the student first. Evidence from the independent evaluation of the 16 to 19 Bursary Fund identified some students who had been sanctioned to the extent that their bursary funding had been stopped for a whole term. This is not recommended as it can stop students attending and undermine the purpose of the Bursary Fund.

Institutions should consider the impact on attendance that might be caused by illness, caring responsibilities or other exceptional circumstances. This should be built into the payment conditions agreed between the student and their institution, so that both parties are aware of the potential affect on payments.

Institutions should stop payments where students have been absent for a period of 4 continuous weeks or more (excluding holidays, or if there is evidence of an intention of the student to return) and where students have made a decision to withdraw from a study programme. Institutions can also take money back from students if they have not spent it for the agreed reasons it was awarded to them. However, institutions should consider the impact of such an action on the individual student before taking a final decision to do so.

Examples of best practice for payment conditions include:

1. One college has very clear terms and conditions for receipt of the bursary, which are highlighted on their application form. The college monitors this to identify any issues and consider whether additional support is needed. A minimum 85% attendance is the current standard but support may continue if a student's attendance falls below the requirement, and there is a valid reason for it, for example illness, a caring role or family problems.

2. In one school, at the start of their study programme, students sign a contract which states the rules that they will abide by – including truthfulness, attendance and behaviour. If the student does not comply, in particular if there are absences, they are sent a text message informing them that their bursary may be withheld. Before any payments are stopped they are given an opportunity to explain their absence.

## **Exclusions what the bursary can't be used for**

The 16 to 19 Bursary Fund should not be used by institutions for any reason that would give them a competitive advantage over other institutions, such as:

- enrolment or administration fees imposed by the institution
- fees for access to facilities in the institution
- block subsidy of the canteen
- block subsidy of transport
- block provision of equipment, material or books
- paying bonus payments to reward attendance or achievement

The bursary fund is designed to support students who have a genuine financial difficulty that might prevent them from continuing in education, rather than acting as an incentive for attendance. As such, block payments to students for attendance irrespective of their actual financial need should not be made.

## **Discretionary bursary fund allocations**

For institutions that already have a contract or funding agreement with EFA, a discretionary bursary allocation will be made on an annual basis. Institutions that are new to EFA should see new institutions.

Where an institution operates out of more than one location across England, or through sub-contracts, EFA will make the allocation to the lead office for distribution to each site. Institutions should ensure that any young people attending provision delivered by sub-contractors are able to apply for the 16 to 19 Bursary Fund. It is the institution's responsibility to ensure that the bursary fund is administered appropriately, in line with this guide and their policies at each site and by any sub-contractors.

## **Allocations methodology**

For most institutions, the discretionary bursary allocation for the 2016 to 2017 academic year has been calculated as follows:

- the number of students that received £30 a week EMA in the 2009 to 2010 academic year, as a percentage of the 2010 to 2011 funded student numbers
- this percentage has been applied to institutions' 2016 to 2017 allocated student numbers and multiplied by the 2016 to 2017 standard funding rate of £298

For example: if the percentage is 40%, and 500 allocated student numbers, that generates an allocation of  $200 \times £298$ .

The allocation is paid in 2 parts - two-thirds in August 2016; one-third in April 2017.

See [Free Meals in further education](#) for more information.

## **Converter academies**

EFA uses the same methodology to generate discretionary bursary allocations for academies as they do for other types of institution. Allocations are paid in 2 parts – the first two-thirds is paid in September 2016 (reflecting that this is the date of first payments generally made to academies) and a third in April 2017.

Existing school sixth-forms that will become converter academies in September will have already received their first bursary payment in August (via the local authority as school sixth-forms). Subsequent bursary payments will be made to the academy directly from EFA.

## **Maintained schools and other maintained institutions**

Maintained schools' sixth-form discretionary bursary allocations are made through local authorities, who are asked to pass the funding to the school.

Local authorities may also be allocated discretionary bursary funds by EFA to cover students in other maintained institutions such as Pupil Referral Units and a small number of other institutions who EFA do not have a direct funding relationship with.

## **New institutions**

Institutions that start delivering education and training for EFA for the first time in the 2016 to 2017 academic year will be considered for a discretionary allocation when an EFA contract is generated. Any allocation will depend on the nature of the programme being delivered.

To be eligible for an allocation, the institution must meet the eligible provision criteria set out at eligible provision. EFA may also undertake a financial health assessment of the institution before deciding to allocate funding.

Where institutions meet the criteria and wish to apply for an allocation they should contact EFA:

## **EFA enquiries**

Contact form <https://form.education...>

For all enquiries for the Education Funding Agency

## **Administration fees**

Institutions that are in scope for both the 16 to 19 Bursary Fund and free meals in further education schemes are being given a single allocation in the 2016 to 2017 academic year. EFA will confirm to institutions how much has been allocated to them for each of the 2 elements to create the overall total.

Institutions are permitted to use up to 5% of the single allocation for administrative costs.

## **Managing bursary underspends and recycling vulnerable bursary payments**

### **Underspends**

Any bursary underspends from the 2015 to 2016 academic year can be rolled forward into the 2016 to 2017 academic year and added to that year's discretionary bursary allocation. Any funds which are rolled forward must be spent before institutions use their allocated discretionary funds for the 2016 to 2017 academic year.

Any bursary underspends which are rolled forward to the 2016 to 2017 academic year must be spent in line with this guide and the institution's bursary policy. In other words, the funding must continue to be used to support students assessed as eligible for support from the 16 to 19 Bursary Fund.

If an institution has funds remaining from previous academic years or is clear that they do not need the full amount of funding available to them in the 2016 to 2017 academic year (their bursary allocation for that year plus any funds rolled forward from the previous year) they should contact EFA. EFA will arrange for the funds to be recovered from the institution.

### **Recycling vulnerable bursary funds**

Institutions may accrue some unused vulnerable bursary funds during the academic year, for example:

- if a student leaves early after only receiving part of their vulnerable bursary
- if the full amount is not paid to a student because they did not meet the agreed conditions

Up to 30 April 2017, institutions are expected to recycle this funding and use it to offset against claims to the SBSS for other vulnerable students. For example, rather than claiming £1,200 for a newly identified vulnerable student, the institution may have £600 which is not now being used for a student who has left early. The £600 could be recycled for the new student and £600 claimed from the SBSS to reach the total required.

Where funds from a previous vulnerable student are being recycled and institutions require no additional funding (because the full amount can be covered from funds the institution already has), a funding claim form should still be submitted to the SBSS to ensure EFA has accurate information on the numbers of vulnerable students.

From 1 May 2017, institutions can add any vulnerable bursary funding claimed, but no longer required for vulnerable students, to their discretionary bursary allocation.

## **Best practice in administering the 16 to 19 Bursary Fund**

Institutions that offer standard academic year provision may wish to specify that all applications for the bursary must be submitted by a specific date so that they can assess the overall level of demand and make discretionary awards on a fair basis. However, they may also wish to consider that some needs may arise later in the year. Consequently, EFA recommends that there should be no absolute cut-off date for applications.

For institutions offering short-term or roll-on roll-off provision, students should be able to apply for help from the bursary fund at any point during the academic year.

As the Bursary Fund is intended to help students overcome financial barriers to participation, institutions must ensure that payments are made in a timely way, ie not too late in the year for them to help students with the costs of participation.

### **Raising awareness/encouraging applications**

Institutions should publish clear statements about their bursary fund policies (see also setting and publishing bursary fund policies). It should be clear to students that they are being supported by the 16 to 19 Bursary Fund and institutions should be mindful of this when considering developing their own financial support branding.

Institutions may want to consider ways in which they can encourage students to apply. Good practice suggestions include:

- setting up data sharing agreements with other agencies and individuals so that they can help identify students with the greatest need for support and raise awareness of the bursary as early as possible
- setting up processes that maintain confidentiality, so that students do not feel embarrassed about applying for support from the bursary

Examples of policies and procedures in place at institutions designed to raise awareness of the bursary early include:

1. This college has information about the 16 to 19 Bursary Fund on the college website and in the prospectus, as well as on posters which are on display around the college throughout the year. Information is distributed at open evenings for year eleven pupils from local schools. Further information, including an application form, is available following enrolment and all new entrants receive a text message and email about the 16 to 19 Bursary Fund soon after the start of the academic year.
2. In another college, information about the 16 to 19 Bursary Fund is publicised in prospectuses, at open evenings, in leaflets, at enrolment, on posters around college and in the college's internal newsletter. Information, application forms and guidance are also sent out in application packs, and tutors are encouraged to pass information on during one-to-one meetings with students. The college also works with local support services to target potential students who are homeless and provide them with information.
3. A college employs a variety of methods to ensure eligible students are aware of the vulnerable group bursary. Aside from information in marketing materials, the college promotes the 16 to 19 Bursary Fund and other support through partner organisations, social services, foster parent networks, schools, asylum support teams and youth offending and health services. Within the college all staff are informed about the

- support available and the needs of young people in the vulnerable groups. The college works with these organisations to identify and engage with young people considering further education and to provide opportunities to discuss the support they may need.
4. The 16 to 19 Bursary Fund is publicised on another college's website, and in all publicity literature, including the prospectus and newsletter. All students are given a leaflet about it as part of their enrolment pack. It is also advertised on the local radio, and year eleven students are informed about the financial support available during school visits.
  5. This college markets the 16 to 19 Bursary Fund proactively by providing information to prospective students prior to enrolment at open evenings, talks at schools etc. Any young person who attends a pre-enrolment interview gets a card with brief information on the bursary and pointers directing them to the full information on the college's website. Information is also provided in enrolment packs, in conversations with tutors and via the website. In addition, social workers who work with the most disadvantaged young people help the college to identify potential vulnerable bursary recipients.
  6. Another college uses text messages throughout the year to inform students of the financial support available to them. In the summer term, text messages are sent to inform students that application forms are available to download and complete. Information about the 16 to 19 Bursary Fund is also available on the college website, on power point presentations that appear on screens throughout the college, and on dedicated noticeboards in the college. The 16 to 19 Bursary Fund is also promoted on open days, parents' evenings and in the college prospectus.

## **Free meals in further education**

The additional funding for free meals for post-16 students attending further education funded institutions was introduced in the 2014 to 2015 academic year to provide parity with those young people attending school sixth-forms.

In the 2016 to 2017 academic year, EFA is removing the ring fence between the free meals in further education allocation and the 16 to 19 Bursary Fund discretionary bursary allocation. The 2 allocations will be calculated separately by EFA, but institutions will be given a single overall allocation that includes funding for both schemes to maximise flexibility. Institutions must ensure they manage the single allocation appropriately to ensure all eligible students are provided with a meal in line with this guide.

Prior to the 2014 to 2015 academic year, institutions had been supporting the cost of meals for students who needed them on a discretionary basis from the 16 to 19 Bursary Fund. The external evaluation of the Bursary Fund estimated that this represented over £15m of discretionary bursary spend annually. Provision of free meals is now established and in its second year of implementation. Consequently in the 2016 to 2017 academic year EFA is removing £15 million from the budget in respect of this double funding by reducing 16 to 19 Bursary Fund discretionary allocations to take account of this for those institutions also in receipt of an allocation for free meals.

Free meals funding for further education institutions have been generated based on their 2015 to 2016 academic year ILR RO6 data returns and their lagged student number for the 2016 to 2017 academic year. More information about the methodology is set out in the [free meals guide](#).

To make the £15 million adjustment for double funding, EFA has calculated each institution's share (percentage) of the total amount of free meals allocations. This percentage has then been applied to the £15 million to calculate the amount that needs to be subtracted from the institution's discretionary bursary allocation. Protection levels have been built into this process so that no institution experiences a reduction of greater than 25% for their 16 to 19 Bursary Fund allocation and no institution has a 16 to 19 Bursary Fund allocation of less than £500. More detail about the methodology is set out in the funding statements issued to institutions in March 2016.

The free meals in further education funding rate of £2.41 remains the same in the 2016 to 2017 academic year. If institutions wish to enhance the rate, ie to provide a meal with a greater value, they have the discretion to do so.

However, if institutions choose to enhance free meals funding, they must ensure that they do so in a way which ensures that funding for discretionary bursaries continues to provide sufficient help to students facing the range of barriers to participation (for example the cost of transport, books, equipment). Free meals funding should not be enhanced to the detriment of other needs.

Students who are eligible for a free meal may receive additional support from the Bursary Fund, if the institution assesses that they meet the criteria for a defined vulnerable group bursary or that they are facing significant financial barriers to participation and require additional support from the discretionary bursary.

Institutions should, however, ensure that the provision of a free meal, or the funding provided to the student for the free meal, is considered when assessing their overall need for support – this point applies both to the vulnerable group bursary and discretionary bursary.

Institutions should continue to use discretionary bursary funds to provide meals to students who are not eligible for free meals but for whom the absence of regular meals is proving a barrier to their participation and achievement.

## **Other student support schemes**

Students in receipt of the 16 to 19 Bursary Fund can also receive help from other EFA funded student support schemes. Care to Learn can provide help with the costs of childcare for young parents whilst they are in education; the Residential Bursary Fund or Residential Support Scheme, where available, can provide help with the costs of accommodation where students have had to move away from home to participate in their substantial qualification.

## **Fraud, audit and management information**

### **Fraud and misuse of funds**

The Department for Education takes all concerns relating to financial irregularity or impropriety seriously and will instigate an investigation where it considers that concerns have been raised in good faith and there is sufficient evidence to warrant it. [Further guidance and contact details](#) are available on GOV.UK.

It is the responsibility of the institution to investigate instances of fraud when students are applying for a bursary. Where evidence is found that is misleading or where fraudulent information has been knowingly submitted by a student or parent, resulting in the student receiving a bursary that they should not have received, the institution should attempt to recover the overpayment from the student.

If significant fraud is identified it should be reported to EFA. Significant fraud involves one or more of the following:

- the amount of money is over £1,200
- the particulars of the fraud are novel, unusual, systemic or complex
- there is likely to be great public interest because of the nature of the fraud or the people involved

## **Audit**

16 to 19 Bursary Funds are subject to assurance as part of the normal assurance arrangements for 16 to 19 education and training. [Audit guidance](#) is available for institutions. Institutions should ensure they have appropriate processes in place to record bursary applications and awards (including the number, value, purpose, whether awarded or not, and a brief justification for the decision).

For audit purposes, institutions can either record that they have seen documentation to confirm bursary fund eligibility, for example, by using an eligibility checklist, or they can retain copies of the documentation (photocopies or scans). Where documentation is recorded as having been seen but is not retained, institutions must be fully aware of the implications of the document they are approving. Hard or scanned copies of documentation for the 16 to 19 Bursary Fund should be kept for a period of 6 years (records can be kept electronically).

The documentation should include evidence of the application process, documents relating to how the student was assessed (including copies of any evidence presented for the purposes of determining eligibility) and the funds issued. Where institutions have required a student to give formal agreement to their conditions for payment, for example in a written agreement, copies of this agreement should be kept.

Institutions should keep records to show what payments they have made from the bursary fund. For vulnerable bursaries, this should include:

- a copy of the vulnerable bursary funding claim
- evidence showing that the student is eligible, for example, a letter from DWP or the local authority
- evidence of payments received from the SBSS, for example bank statements and remittance advices
- evidence of payments made to the student

For discretionary bursaries, this should include:

- copies of evidence used to assess entitlement, such as a letter from DWP, or evidence of household income
- a copy of the student's individual assessment of actual financial need

- receipts for purchases made, for example, bus pass, lunch receipts or book receipts

Institutions should also ensure that their bursary fund eligibility criteria are applied correctly and consistently to all students

When institutions are audited by the Funding Agencies Shared Services Team, the funding errors that will result in the recovery of funds are:

- in any circumstances where the institution is not able to demonstrate at audit how their students meet the eligibility criteria of the bursary fund
- in any circumstances where the institution has claimed vulnerable bursary payments for duplicate students

## **Management information**

To reduce bureaucracy, the annual voluntary management information collection for the 16 to 19 Bursary Fund has ceased.

Institutions should complete the Individualised Learner Record (ILR) or school census, as appropriate, to indicate the numbers of students receiving the 16 to 19 Bursary Fund.

## **Complaints or appeals about the Bursary Fund**

If a student is unhappy with the way their application for Bursary Fund support has been handled by the institution, they should follow the institution's own complaints procedure.

Bursaries are administered by institutions and local authorities. EFA does not have a role in this, and does not usually get involved with complaints. EFA may only get involved if the allegation is that this guide is being seriously disregarded.

The escalation of complaints about the bursary fund should be handled in the same way as any other complaint to an institution. Institutions must have their own procedures in place, which must be exhausted before EFA is approached.

## **How to ask a question about the Bursary Fund**

If institutions have a question that is not covered in this guide, please contact:

### **EFA enquiries**

Contact form <https://form.education...>

For all enquiries for the Education Funding Agency

Any questions specifically about completion of the funding claim for vulnerable students or about payments made by the SBSS following submission of a funding claim should be directed to the SBSS provider helpline on 0300 303 8610 or at:

[1619bursary@studentbursarysupport.co.uk](mailto:1619bursary@studentbursarysupport.co.uk).