

# 16-19 Bursary Fund

## Questions & Answers for Schools, Academies, Colleges, Training Providers and Local Authorities

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# Contents

<b>Section</b>	<b>Page number</b>
New Questions	3
1. Vulnerable Groups and learner eligibility	5
2. Valid Provision	9
3. Provider Administration of the Bursary Fund	10
4. Allocations and payments	13
5. Payments to students	14
6. Requesting Additional Funding, MI, Data and Audit	16
7. Transitional EMA and the 16-19 Bursary Fund	18
8. Queries from Academies	19

## **New/Updated Questions**

### **Can providers recover funds already paid to students?**

The bursary fund has been introduced for the purpose of removing specific barriers to participation, and should be used specifically for this purpose – unlike EMA, it is not an incentive for participation, but targeted support to individuals who are struggling with the financial costs associated with participating in learning. Therefore, it should be spent in such a way that it removes specific barriers – for example, cost of lunches, equipment, books etc.

As specified in the Guide, receipt of a bursary should be conditional on the student meeting agreed standards set by the provider. Although it is not a requirement, providers may adopt a policy whereby they require students to return funds that have not been spent on the agreed items, or where a student leaves a course early. However providers would first need to make it clear to students that this is their policy and that it may be enforced.

### **End of Year MI Return**

Providers will be asked to submit a Management Information return about 16-19 Bursary Fund activity at the end of the 2011/12 academic year. This will be collected through the YPLA's IM Portal during October 2012. The IM Portal is used across the YPLA and is our main route of secure communication with providers.

For the end of year MI collection we will ask for the following information:

#### **Bursaries for students in the defined vulnerable groups:**

- Total number of students from one (or more) of the defined vulnerable groups awarded a full £1200 bursary
- Total number of students from one (or more) of the defined vulnerable groups awarded one or more pro-rata bursaries
- Total number of students from the defined vulnerable groups receiving a full or pro-rata bursary from each of the following categories:
  - Young person is in care (looked after)
  - Young person is a care leaver
  - Young person is in receipt of income support
  - Young person is in receipt of both Employment Support Allowance and Disability Living Allowance
- The total amount paid to students in the defined vulnerable groups (full and pro-rata)

#### **Discretionary bursaries:**

- The total number of students awarded one or more discretionary bursaries
- The total number of discretionary bursaries awarded
- The total number of discretionary bursaries awarded for the following categories;
  - Transport
  - Other specified purposes such as books, meals, equipment, exam re-sit fees
  - For an unspecified purpose (this could be a cash amount awarded to support a student generally but not for a specified purpose)

The end of year MI collection enables providers to submit data about the numbers of

students supported by the Bursary Fund over the full academic year, including discretionary bursaries.

The information collected via the end of year MI return will inform the Department for Education evaluation of the impact of the scheme and may also be used to inform future years' allocations of the Bursary Fund.

## **1. The vulnerable groups and learner eligibility**

### **1.1 What are the vulnerable groups?**

The defined vulnerable groups are:

- Young person is in care (the young person's home local authority will confirm that an individual is in care under Section 20 of the Children Act 1989).
- Young person is a care leaver (the young person's home local authority will confirm that an individual is a care leaver).
- Young person (not their parents) is in receipt of income support (evidenced by letter/document from the benefits office).
- Young person (not their parents) is in receipt of both Disability Living Allowance (or Incapacity Benefit) AND Employment Support Allowance.

Young people on income support, and those in receipt of both Disability Living Allowance and Employment and Support Allowance are included in the defined vulnerable groups eligible for a £1,200 bursary. Young people in these groups are deemed to be financially independent of their parents / carers, and are entitled to certain social security benefits in their own right. Their inclusion in the defined vulnerable groups reflects this.

### **1.2 Can you clarify the age eligibility for the Bursary Fund?**

To be eligible to receive a bursary the young person must be aged under 19 on 31 August in the academic year in which they start their programme of study. Where a young person turns 19 during their programme of study, they can continue to be supported to the end of the academic year in which they turn 19, or to the end of the programme of study, whichever is sooner. In general, bursaries should be paid only to young people who have reached the statutory school leaving age.

A young person must be under 19 on the day their course starts. Young people who are care leavers aged 19 and over on the day their course starts are not eligible to receive support from the bursary fund.

### **1.3 I understand that Adult Learning Grant (ALG) will not be available to students in 2011/12. Can students who are 19 apply for a bursary?**

No. A new enhanced adult learner support fund is available from 2011/12. The Adult Learning Grant (ALG) budget has been combined with discretionary learner support, and allocated directly to colleges and training providers for them to distribute to those learners most in need. In 2011-12 this amounts to around £152m, and this amount will increase over the Spending Review period.

The support for 16-18 and 19+ is allocated to providers from two Departments, with separate accountability. Providers will need to continue to manage and account for budgets separately, which will be subject to audit.

Learners who will not be supported by transitional arrangements for ALG and who are 19 and over, should contact their college or other provider to see if they can access support from the enhanced adult learner support fund.

#### **1.4 How do we identify students eligible for the £1,200 bursary?**

Providers are responsible for identifying young people in the defined vulnerable groups, who are eligible for this payment. In doing so they will want to seek appropriate evidence from the young person, for example:

- for those students in receipt of Income Support, or Disability Living Allowance and Employment Support Allowance - a letter setting out the benefit to which the young person is entitled;
- for those students who are in care or a care leaver - written confirmation of the young person's current or previous looked-after status from the local authority which looks after them or provides their leaving care services. The young person must be/have been in care under Section 20 of The Children Act 1989.

#### **1.5 Is the Vulnerable Young People group final? If I have a learner who is not in the defined category but I believe to be vulnerable, can I award them £1,200?**

The four groups of young people identified as vulnerable for the purposes of the £1,200 are final – these being: young people in receipt of income support, in care, care leavers, young people in receipt of both Disability Living Allowance and Employment Support Allowance.

Beyond this, schools, colleges and training organisations are able to use their discretion to award bursaries to young people who are not in one of the vulnerable groups. If they think it necessary (and if their budget allows) they may choose to award £1,200 (or more) to a learner who has major financial difficulties but is not in one of the defined vulnerable groups.

#### **1.6 Can you give more explanation on the definition of a care leaver?**

The following definitions should be applied:

- Eligible children ('looked after'); this is a child who is looked after, aged 16 or 17, and has been looked after for a period of 13 weeks or periods amounting to 13 weeks, which began after s/he reached 14 and ended after s/he reached 16.
- Relevant children ('care leavers'); this is defined as a child who is not looked after, is aged 16 or 17, and was, before s/he ceased to be looked after, an eligible child.
- Former relevant children ('care leavers'); this is defined as a young person who is aged 18 or above, and has been either a relevant child and would be one if s/he were under 18, or immediately before s/he ceased to be looked after at 18, was an eligible child.

#### **1.7 Are young people in a foyer/hostel aged 16-18 counted as looked after?**

It should not automatically be assumed that a person living in a foyer/hostel is or has been 'looked after'/in care (under section 20 of the Children Act 1989). It would usually be the local authority that would confirm whether a child is in care or a care leaver. If a young person is unknown to the local authority then, unless they have moved in from another local authority, it may be that they are not, or have never been, looked after.

The young person will need to provide appropriate evidence (to the learning provider) of being looked after, or a care leaver, in the form of written confirmation of their current or previous looked after status from their local authority.

**1.8 If a young person is in foster care, including foster care that has been privately arranged, are they regarded as being 'in care/looked after' and would they therefore be entitled to the £1,200 guaranteed bursary?**

Where a young person has been placed with a foster carer by the local authority (including where the foster carer is on the books of an independent fostering agency) s/he is considered to be looked after and is therefore in a vulnerable group for the purposes of the 16-19 bursary fund.

A child who is privately fostered (the arrangement is made between the parent and the person who will care for the child) is not considered to be a looked after child, as this is a private arrangement.

**1.9 Can you confirm the criteria around DLA and ESA? Is it the young person who must be in receipt of both of these?**

The young person must be in receipt of both ESA and DLA.

Only young people with a disability, who are in full-time education and who are in receipt of DLA, can claim ESA - they need to be aged 16 or over to do so, and ESA is only paid where a person has limited capability for work because of illness or disability. The young person does not have to live independently of their parents, they can claim ESA in their own right (although their parents will not then have any entitlement to claim Child Benefit for them).

Young people on income support, and those in receipt of both Disability Living Allowance and Employment and Support Allowance are included in the defined vulnerable groups eligible for a £1,200 bursary. Young people in these groups are deemed to be financially independent of their parents / carers, and are entitled to certain social security benefits in their own right. Their inclusion in the defined vulnerable groups reflects this.

**1.10 We have some learners who are receiving Incapacity Benefit rather than ESA. Are they eligible for a bursary?**

Yes. ESA was introduced in October 2008 to replace Incapacity Benefit for sick and disabled people; therefore, there are some people in receipt of Incapacity Benefit, and some in receipt of ESA until all have been transferred onto ESA.

Therefore, where a young person aged between 16 and 19 is in full-time education and is in receipt of both Incapacity Benefit and DLA, they would fall into the vulnerable group and would be eligible for the £1,200 bursary payment.

**1.11 Does the vulnerable group include children of armed service personnel who have died in service, or are the children of serving armed services personnel?**

No. The Ministry of Defence is operating a separate scheme to provide scholarships set at £1,500 per year to 16-18 year old children of service personnel who have died as a result of their service. The intention of this FE scholarship is to ensure that these young people are able to complete their education and progress to Higher Education (HE). The scheme differs from a learner support scheme such as the Bursary Fund in that it is extra support in recognition of the position of young people in these circumstances.

For progression to HE for young people in these circumstances, the Ministry of Defence is offering a university scholarship which will contribute to the cost of taking a first undergraduate course at a publicly-funded UK higher education institution.

Further information on the scheme and how to apply can be found on the Ministry of Defence website:

<http://www.mod.uk/DefenceInternet/AboutDefence/WhatWeDo/Personnel/SPVA/Education/ScholarshipSchemeForBereavedServiceChildren.htm>

Young people who are the children of serving armed forces service personnel, while not included in the identified vulnerable group, will be able to apply for a discretionary 16-19 Bursary from their school or college.

### **1.12 What about asylum seekers? Are they eligible for the bursary?**

Unaccompanied asylum seeking children (UASC) do not receive cash support from the United Kingdom Borders Agency (UKBA). They are the responsibility of the local authority. They are treated as looked after children. As such, and in accordance with the 16-19 Bursary Fund guidance, they are eligible for the £1,200 bursary.

When these young people reach legal adulthood at 18 then, unlike 'citizen' children in care, they have an immigration status that must be considered. If their asylum claim is decided in their favour then the local authority will consequently have related responsibilities to provide them with support and services as 'care leavers'. As such, they are eligible for the £1200 bursary.

However, where a UASC's asylum claim is not decided in their favour, they may be unable to remain (legally) resident in the UK. When UASC asylum claims have been fully heard and they are "Appeals Rights Exhausted" (ARE) then they have no entitlement to public funds (with a few exceptions where the withdrawal of support would be regarded as a breach of their human rights).

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 may apply for help from the UKBA, who can provide suitable housing and cash for essentials, but they should not be accessing other income. As long as an asylum seeker has not had their application refused then learner support in the form of course related books, equipment or a travel pass may be provided. But under no circumstances should a provider give cash to an asylum seeker who is not an UASC.

### **1.13 How do we decide which students should have a discretionary bursary?**

Schools, colleges and training providers will be able to determine their own criteria for eligibility for discretionary bursaries, and for deciding the level of awards. We expect that in many cases providers will want to agree a consistent approach across an area, taking account of the needs and circumstances of young people locally. It is important to note that it is not a requirement for providers to use the receipt of free school meals as the eligibility criteria for a discretionary bursary. Providers may choose to take account of this if they deem it appropriate.

## **2. Valid Provision**

### **2.1 Are there any types of provider that can't access the bursary fund?**

To be eligible for an allocation of the 16-19 Bursary funding, learning provision must be publicly funded and subject to inspection by a public body that assures quality (e.g. Ofsted). Full details are set out in the 16-19 bursary fund guide.

Young people participating in independent provision will not normally be eligible for support from the 16-19 Bursary Fund.

However, where a young person aged 16-19 has been referred by the local authority to independent provision and where that individual's provision is being funded by the local authority, the young person should be able to apply for support from the 16-19 Bursary Fund.

In these instances, the young person, or his or her parents/carers should apply for support from the 16-19 Bursary Fund through the young person's home local authority.

### **2.3 Are young people aged under 19, studying Higher Education qualifications eligible to receive a bursary?**

No. The 16-19 Bursary Fund is designed to help young people with the costs of continuing in further education only; separate student finance arrangements are available to help support young people in higher education – young people can find out more details at [www.direct.gov.uk/studentfinance](http://www.direct.gov.uk/studentfinance)

### **2.4 Are young people in Apprenticeships programmes eligible to apply for 16-19 bursary support?**

Young people on waged Apprenticeship programmes are not eligible to apply for support. Young people on a non-waged Access to Apprenticeship pathway from 1<sup>st</sup> August 2011 or who started a Programme-led Apprenticeship before 31<sup>st</sup> July 2011 are eligible to apply for bursary support.

### **2.5 Where a student is on one of the Apprenticeships that are exempt from being employed-status, can they receive support from the Bursary Fund?**

If a student is undertaking one of these Apprenticeships, they may receive support from the Bursary Fund for the period that they are not in receipt of a wage.

### **2.6 Which type of schools, colleges and training providers are eligible for an allocation of 16-19 bursary fund?**

As allocations have been made on the basis of the number of young people at each provider in receipt of Education Maintenance Allowance at the £30/week rate in 2009/10, those providers have formed the basis of the 'eligible provider list'.

Where a provider had EMA learners in 09/10 but does not meet the criteria of being eligible for public funding **and** subject to inspection by a public body that assures quality (e.g. Ofsted), they have not been awarded a bursary fund allocation.

### **2.7 My school/college is in England, near the Welsh/Scottish border. Can my students who reside in Wales/Scotland apply for 16-19 bursary funding at my school/college?**

If a Welsh/Scottish student is studying at a provider in England they may apply for support from the bursary fund. If the student is in receipt of Welsh/Scottish EMA, or English EMA

under the transitional arrangements (for 2011/12 only), the provider must take account of this when deciding whether to award a bursary and at what level.

The reciprocal arrangements with Wales, provided that the provision is state funded and meets the remainder of the eligibility criteria, are as follows:

Young people from Wales at school or college in England:

- Young people can apply for a Welsh EMA, and this should be the first port of call;
- Young people may also apply for a discretionary bursary only from the Bursary Fund, but any EMA payments they may already receive should be taken into account in assessing any discretionary award;
- These young people are not eligible for the full £1,200 bursary for students in the defined vulnerable groups.

Young people from England at school or college in Wales:

- Young people who are continuing learning in Wales, who received EMA in Wales in 2010/11, are able to continue to receive an EMA payment from the Welsh EMA scheme for their second (and exceptionally their third) year's education in Wales – providing they still meet the eligibility criteria. The payment the young person received in 2010/11 will be matched this year. These young people may also apply for discretionary learner support (via their Welsh provider's Financial Contingency Fund), but their EMA payments should be taken into account in assessing any discretionary award. These young people are not eligible for the full £1,200 bursary for the defined vulnerable groups.
- 'New' learners from England being educated in an FE College in Wales can apply for discretionary learner support from their provider in Wales (via their Welsh provider's Financial Contingency Fund);
- 'New' learners from England being educated in a special college or a school sixth form in Wales can apply for a discretionary bursary from their home local authority in England;
- 'New' learners from England being educated in Wales, who also belong to one of the defined vulnerable groups will be eligible for a bursary of £1,200, which should be paid by their home local authority.

### **3. Provider Administration of the Bursary Fund**

#### **3.1 How are we supposed to assess a student's household income?**

It is not a requirement of the bursary fund for a student's household income to be assessed, though providers may decide to take account of it as evidenced by receipt of benefit, P60 or Tax Credit Award Notice if employed, or SA302 form or certified accounts if self-employed. Students currently or previously in receipt of free school meals are not automatically entitled to receive a bursary, but this may be taken into account.

#### **3.2 How will we know if a student was entitled to Free School Meals in Year 11?**

Young people currently or previously in receipt of free school meals are not automatically entitled to receive a bursary, but this may be taken into account. Arrangements for checking eligibility for free school meals vary between local authority areas; providers may wish to discuss with other providers and with the local authority ways to ensure relevant data is shared appropriately and securely.

### **3.3 What if students that should get the £1,200 bursary turn up in January or after our allocation has been used?**

Providers should anticipate that some new or existing students may need extra financial help during the course of the year, and in many cases they will hold back a reserve for that purpose. The YPLA has guaranteed to cover the costs of bursaries for students in the defined vulnerable groups in instances where numbers at any one school, college or training provider are such that the provider's initial allocation is either insufficient to meet the guarantee, or meeting the guarantee would result in little or no funds remaining to award discretionary bursaries.

### **3.4 Young people from the defined vulnerable groups may change providers and apply for a second bursary – how do we deal with this?**

We expect schools, colleges and training providers to take reasonable steps to ensure that funding is issued in such a way as to keep the risk of 'over-payment' to a minimum, whilst ensuring that the students' needs are met. Providers have the freedom to pay bursaries in instalments, allowing awards to be phased over a course, and to withhold payments if a student stops attending. We also encourage providers in an area to discuss with each other the principles of how they will allocate their bursary funds to help with this situation.

### **3.5 Transport – can we use the bursary funding to operate a bus route to get students here?**

The overriding principle of the 16-19 Bursary funding is that it should respond to **individual** need where there is a barrier to participation.

Local authorities have a duty to prepare and publish an annual transport policy statement that specifies the arrangements for the provision of transport that they consider necessary to facilitate the attendance of young people of sixth form age receiving education and training. This should include the provision of financial assistance as they deem appropriate.

Bursaries to help meet transport costs should be targeted to individual students, where those costs have been identified as a real barrier to that student's participation, and should not be used to block subsidise the provision of transport.

### **3.6 We plan to operate an internal bursary fund from our own funds as well as the national one given by the YPLA. Can we mix and match the funds and their use?**

There is nothing to prevent a school, college or training organisation topping up the 16-19 Bursary fund with other funding to support young people facing financial barriers to learning.

### **3.7 We have a number of schools (and other providers) who wish to implement a collaborative approach to the management of the 16-19 Bursary Fund, which will include pooling funds and central management. Is there any reason we cannot take this approach?**

There are no reasons why you should not take this approach. Indeed, it should help the establishment of a consistent approach to meet local needs, as suggested in paragraph 29 of the Guide.

However, this will have implications for MI and budget reporting. Collaborations must be prepared to submit an MI return for each provider involved.

### **3.8 Will you be providing an Equality Analysis on the Bursary Fund policy?**

A full Equality Impact Assessment for the 16-19 Bursary was published in March 2011 and is available on the Department for Education website

(<http://www.education.gov.uk/16to19/studentsupport/financialsupport/a0064057/financial-support-for-learning>).

Providers are responsible for developing their own arrangements for the administration of the 16-19 Bursary Fund within their organisation; as stated in the Guide for 2011/12, providers should develop a statement on how they will administer and distribute their funds. As part of this, providers will want to consider undertaking their own Equality Analysis of their emerging Bursary Fund administration policies.

### **3.9 Paragraph 19 of the Bursary Guide says that I cannot use the bursary fund for block provision of equipment, however paragraph 21 says that I should look at bulk purchasing of equipment with other colleges to save money. We plan to do a bulk purchase of catering uniforms for learners in conjunction with a local college and then to allocate the uniforms to learners in hardship: does this mean that we cannot use the bursary fund to purchase this?**

The 16-19 Bursary fund could be used in these circumstances as the plan is to allocate to those in hardship and not to make the equipment generally available, i.e. including for students who would be able to purchase the equipment themselves. It would not be appropriate, however, for a college to make such a bulk purchase using the bursary fund and then not to target the materials/equipment purchased towards those facing the most significant financial barriers to participation.

### **3.10 How do we deal with complaints or appeals about our decisions on bursary funding?**

If a student feels aggrieved about how their request for a bursary was handled, they should follow the provider's usual complaints procedure.

Bursaries are administered by providers and Local Authorities at their discretion. The YPLA does not generally have any role in respect of individual cases and may only become involved if the allegation was that the Guide was being seriously disregarded e.g. vulnerable students were not being awarded the £1200 bursary, or where there was misuse of the funding such as for block subsidy of a canteen/transport.

The escalation of complaints in relation to the 16 - 19 Bursary Fund should be handled no differently to other complaints to a provider. Providers must have their own complaints and appeals procedure to deal with a number of issues such as admissions policy, curriculum, dress code for example and, in all instances, that procedure must be exhausted before approaching the YPLA.

Where an Academy's complaints procedure has been exhausted and the issue is of a serious nature as set out above, the complaint should be forwarded to the Academies Team at the YPLA at [academiesenquiries@ypla.gov.uk](mailto:academiesenquiries@ypla.gov.uk)

### **3.11 Will there be a 'last date' cut-off when students can apply for the discretionary 16-19 Bursaries?**

Providers can manage the administration of the discretionary bursary awards as they see fit – they should manage the number and size of these within their annual budget. Many providers will encourage that requests for bursaries are submitted by a certain date, so they can assess the overall level of demand and make awards on a fair basis. But it is

inevitable that some needs will develop in-year so there should be no absolute cut-off date.

### **3.12 Can providers recover funds already paid to students?**

The bursary fund has been introduced for the purpose of removing specific barriers to participation, and should be used specifically for this purpose – unlike EMA, it is not an incentive for participation, but targeted support to individuals who are struggling with the financial costs associated with participating in learning. Therefore, it should be spent in such a way that it removes specific barriers – for example, cost of lunches, equipment, books etc.

As specified in the Guide, receipt of a bursary should be conditional on the student meeting agreed standards set by the provider. Although it is not a requirement, providers may adopt a policy whereby they set out that they will claw back money from students where they have not spent it on the ‘qualifying’ purposes. Providers would need to make clear to learners that this is part of their policy and that it may be enforced.

## **4. Allocations and Payments (providers)**

### **4.1 How has my allocation been calculated?**

Allocations have been made on the basis of the number of young people who were at each provider and in receipt of Education Maintenance Allowance at the £30/week rate in 2009/10, multiplied by the standard funding rate of £190 per eligible young person. The sector was consulted in the first half of 2011 and responses confirmed that allocations based on this methodology would be preferred.

### **4.2 Will you be publishing a list of all school, college and training providers’ allocations? If so, when and where?**

Details of the initial 2011/12 provider allocations for the 16-19 Bursary Fund have been published to the YPLA website together with the allocations of participation funding.

### **4.3 I am a Local Authority, what do I do if a school, college or training provider, or a student (vulnerable or otherwise), turns up asking for a bursary – the provider is not on my list of allocated providers?**

The list at Annex C is not exhaustive of institutions where you might make a bursary award. The list is of institutions where there have previously been young people on EMA, which is the basis upon which we have calculated your allocation. In practice, some that previously had EMA students might actually not have much need of bursaries, whereas other institutions might have greater need. So in the first instance we would encourage you to manage the award of bursaries to all such providers in your area within your overall allocation.

Should you find that you have a higher number of young people in the defined vulnerable groups than your existing allocation will enable you to support, the YPLA may be able to top-up. See Section 6 regarding requesting additional funding.

### **4.4 I subcontract some of my provision to another provider: has my allocation taken into account the EMA learners who were at that provider in 2009/10?**

Yes - Where a provider operates through sub-contracts, the allocation will be made to the lead office for distribution to each site. Providers should ensure that any young people attending provision that is delivered by sub-contractors are able to apply for the 16-19 Bursary Fund. It is the provider's responsibility to ensure that the scheme's objectives are met at each site and by any sub-contractors.

#### **4.5 How will the 2012/13 allocations be calculated when there will be no similar EMA data?**

We are reviewing the allocations methodology for future years following the in-year review exercise.

## **5. Payments to students**

### **5.1 Are we expected to give £800 to all students who are on Free School Meals?**

No, providers are free to determine the size of bursaries. The figure of £800 was an indicative figure used by Ministers to illustrate that, if for example a college decided to focus its bursaries on students who had previously been on Free School Meals, they'd typically be able to make each award worth about £800. It is an example only and is not intended to suggest you need to base your awards on those students who previously had Free School Meals, or to award all students £800.

The philosophy behind the bursary fund is that schools, colleges, academies and other providers will use their discretion, because they are best placed to assess the needs of their students.

### **5.2 How frequently should we make payments? Do payments need to be upfront or in arrears?**

It is at the discretion of schools, colleges and training providers to design arrangements which best suit local needs and individual circumstances, including the frequency of payments.

### **5.3 What conditions should we be applying to payments?**

Receipt of a bursary should be conditional on the student meeting agreed standards set by the provider. Providers are free to determine what those conditions should be, and may wish to continue using the principles of the EMA Agreement and agree standards relating to attendance and/or standards of behaviour. This applies to the payments for students in the defined vulnerable groups and other students alike.

### **5.4 Is there any advice on bank accounts?**

Students aged 16 are able to open a basic bank account, which is offered by 16 members of the British Bankers Association. The basic bank account will allow for receipt of the bursary, including by electronic transfer (BACs), and will allow funds to be withdrawn via ATMs as well as via standing orders and direct debits where necessary.

Where bursary payments are to be made to a bank account, they should only be made to the student's bank account. Payments should not be made into another person's account, except in exceptional circumstances where a student is unable to administer their own account. Payments may be made to a joint account, as long as the student is one of the account holders.

If a student has a Post Office account, it should be noted that these accounts do not accept payments by BACs.

If a student has a Credit Union account, the student should check with the Credit Union that it will receive payments made by BACs.

### **5.5 What sort of 'in kind' payments are acceptable?**

There is no restriction on what 'in kind' payments may be made under the bursary scheme. Examples of 'in kind' payments are: travel passes, meals, course materials.

### **5.6 The Bursary Guide says that we have to pro-rata bursary payments for courses that are less than 30 weeks – what does this mean? How much bursary should I give to a student from a vulnerable group who is only doing a 6 week course for example?**

Taking this example, if a vulnerable student on a 30 week course is eligible for a bursary of £1,200, a vulnerable student on a 6 week course would be eligible for a pro-rated bursary of £240, calculated as follows:

**(Full bursary £1,200) divided by (full time course for 30 weeks)  
times (part time course at 6 weeks) equals £240**

### **5.7 If a student in a vulnerable group is doing a part-time course for more than 30 weeks, how much bursary should they receive?**

Students are entitled to receive a bursary of £1,200 for the academic year, if they fall into the vulnerable group. This amount can be topped up, if providers feel that this is appropriate and they have sufficient capacity within their budget.

### **5.8 If a student in a vulnerable group is doing a part-time course for less than 30 weeks, how much bursary should they receive?**

The most vulnerable young people will be eligible for a bursary of at least £1,200 (pro-rata for courses lasting less than 30 weeks a year). Providers have the discretion to decide how best to distribute this over the duration of the course.

However, £1,200 is a lot of money to pay in one go, but dividing it up into weekly payments of £33.33 (over 36 weeks) could be administratively burdensome. Some Colleges are planning weekly payments to ensure their Bursary system matches their EMA monitoring system. A middle way might be to operate termly payments (3 a year), half-termly (6 a year) or monthly (10 a year). It might be sensible also to run a common system for all 2011/12 bursaries but this will depend on the size of the payment.

### **5.9 Where a learner is on a course for more than one academic year, and they are vulnerable, do they get £1,200 each year?**

The £1,200 would be payable for each academic year the young person is in education or training.

### **5.10 Are we able to award students who fall into the vulnerable group less than £1,200, if they do not need the full amount?**

Students are entitled to receive a bursary of £1,200 for the academic year, if they fall into the vulnerable group. Providers would need to have a clear agreement with the student about why they were awarding less than £1,200.

### **5.11 Is there a limit to how much funding can be given to a non-vulnerable student? Can they have more than £1,200?**

Providers are able to manage the payments from the 16-19 Bursary Fund as they see fit, within their annual budget. There are no limits set for the level of payment awarded to non-vulnerable students wishing to access support from the Fund.

### **5.12 Have any negotiations taken place with DWP about the treatment of any financial support offered to 16-19 year olds with regards to the impact on household benefits?**

The DfE have been in discussions with DWP to agree that they update their regulations to reflect that income-related benefits (which currently include a disregard of any payments of EMA) should now refer to the 16 - 19 Bursaries in the same way.

As with EMA, the 16-19 Bursaries are paid directly to young people in addition to other benefits paid to families by the Government, such as Income Support, Child Benefit, Working Tax Credit, and do not affect them.

## **6. Requesting Additional Funding - MI, Data and Audit**

### **6.1 In-year review: payments of additional funding**

We have asked pProviders and local authorities to submit data about the number of students enrolled with them who are in one of the defined vulnerable groups (young people in care, care leavers, in receipt of Income Support, in receipt of both Disability Living Allowance and Employment Support Allowance). This information has been collected via an online portal and providers were asked to submit this data by 31st October 2011, though late returns were accepted.

It has been extremely useful to receive this information from providers, as it has helped to give a fuller picture of the number of students in the defined vulnerable groups being supported by the Bursary Fund.

The YPLA has guaranteed to release additional funding to ensure that all learning providers have sufficient funds to make £1,200 bursary payments to students in the defined vulnerable groups. We have reviewed the data on this basis in order to determine which providers require additional funding from the contingency fund. On top of this we are ensuring that providers have some funds to enable them to make discretionary bursaries. The expectation is that we will be able to top-up the allocation of any provider who had less than 20% of their original allocation available for discretionary awards.

We will write to all providers who have submitted data, to confirm whether or not they will receive additional funding, and how much they will receive. We hope to be able to release any additional funding to providers alongside the December and March installments, dependant on the appropriate contractual documentation being in place.

As the 2011/12 academic year progresses, should providers find they have insufficient funding to pay the £1,200 bursary to students in the defined vulnerable groups, further additional funding can be requested by emailing us at [1619bursaryfund@ypla.gov.uk](mailto:1619bursaryfund@ypla.gov.uk).

The information provided will also inform providers' allocations of the bursary fund for the 2012/13 academic year.

## **6.2 Can we still submit data to the MI Portal?**

The secure web portal to collect the 2011/12 16-19 Bursary Fund in year review of funding return and the 2010/11 end of year return for discretionary learner support funds is now closed. Providers can continue to submit their data by e-mail.

For the 16-19 Bursary Fund return, please send your data, or any questions you have to: [1619bursaryfund@ypla.gov.uk](mailto:1619bursaryfund@ypla.gov.uk)

For the 2010/11 discretionary learner support fund please e-mail: [dlsenquiries@ypla.gov.uk](mailto:dlsenquiries@ypla.gov.uk)

## **6.3 End of Year MI Return**

Providers will be asked to submit a Management Information return about 16-19 Bursary Fund activity at the end of the 2011/12 academic year. This will be collected through the YPLA's IM Portal during October 2012. The IM Portal is used across the YPLA and is our main route of secure communication with providers.

For the end of year MI collection we will ask for the following information:

### **Bursaries for students in the defined vulnerable groups:**

- Total number of students from one (or more) of the defined vulnerable groups awarded a full £1200 bursary
- Total number of students from one (or more) of the defined vulnerable groups awarded one or more pro-rata bursaries
- Total number of students from the defined vulnerable groups receiving a full or pro-rata bursary from each of the following categories:
  - Young person is in care (looked after)
  - Young person is a care leaver
  - Young person is in receipt of income support
  - Young person is in receipt of both Employment Support Allowance and Disability Living Allowance
- The total amount paid to students in the defined vulnerable groups (full and pro-rata)

### **Discretionary bursaries:**

- The total number of students awarded one or more discretionary bursaries
- The total number of discretionary bursaries awarded
- The total number of discretionary bursaries awarded for the following categories;
  - Transport
  - Other specified purposes such as books, meals, equipment, exam re-sit fees
  - For an unspecified purpose (this could be a cash amount awarded to support a student generally but not for a specified purpose)

The end of year MI collection enables providers to submit data about the numbers of students supported by the Bursary Fund over the full academic year, including discretionary bursaries.

The information collected via the end of year MI return will also be used to inform future years' allocations of the Bursary Fund.

#### **6.4 Will there be an audit by the YPLA? What records do I need to keep for audit purposes?**

Administration and allocation of bursaries will be subject to the institution's normal governance and audit regimes.

For audit purposes, hard copies of all documentation for the Bursary Fund should be kept for a period of 6 years. Providers may wish to keep electronic records of documents, but hard copies should also be available. This documentation should include evidence of the application process, documents relating to how the learner was assessed and the funds issued.

### **7. Transitional EMA and the 16-19 Bursary**

#### **7.1 Can you clarify the arrangements for continuing EMA: who gets it and who will make the payments?**

Transitional arrangements are in place for students previously in receipt of EMA:

- Students who successfully applied for EMA in 2009/10 will continue to be eligible to receive weekly payments at the same rate that they were awarded in 2009/10.
- Students who successfully applied for the maximum EMA weekly payment of £30 in 2010/11 will continue to be eligible to receive £20 for each week they are in education or training.
- Students who successfully applied for EMA payments of £10 or £20 in 2010/11 are not eligible to continue to receive any further EMA payments in 2011/12 under the transitional arrangements.

Where a student's EMA application is reassessed in-year following an exceptional change in circumstance, the rate paid following reassessment will be dependant on the year in which the student first applied for EMA, and will determine which of the three categories above applies to that student.

Where a student turned 19 before the start of the 2011/12 academic year, they are not eligible to continue to receive weekly payments and they were not sent a Notice of Entitlement.

The Learner Support Service will continue to make weekly payments, and schools, colleges and training providers are required to continue making weekly payment decisions in LAPS for those learners who are in receipt of support under the transitional arrangements, or by using any relevant 3PI software that the provider operates.

#### **7.2 Is it acceptable for students to keep receiving their EMA and for providers to top up to £1,200?**

No. Providers are asked not to authorise weekly payments under the transitional arrangements for young people who are eligible for the £1,200 bursary, but to make arrangements to pay that bursary directly to the young person. We have put sufficient funding into the 16-19 Bursary Fund that will be allocated to schools, colleges and training providers in 2011/12 for them to pay the £1,200 bursary to the most vulnerable young

people. The YPLA holds a small contingency to deal with situations in which a provider's allocation is insufficient for them to meet the costs of the bursary to this group.

### **7.3 I have students who are classed as vulnerable, but they are also eligible to continue receiving EMA. Do I have to give them £1,200?**

Where a student is identified as being in one of the defined vulnerable groups, they are eligible for a minimum bursary payment of £1,200. Schools, colleges and training providers should not enrol these students for EMA payments under the transitional arrangements.

Where a student is already receiving EMA payments under the transitional arrangements in 2011/12 and becomes classed as vulnerable during the year, the provider should stop making any payment decisions for EMA payments for that student and should pro-rata any subsequent 16-19 bursary awards.

### **7.4 How do I know how much a young person is receiving under the transitional arrangements?**

Young people aged 17 on 31 August 2011 who are being supported under transitional arrangements will be receiving £20 a week. Older students are likely to be receiving either £30, £20 or £10. The provider may ask the student to evidence the amount of their weekly payments; the Learner Support Service is not authorised to disclose this information.

## **8. Queries for Academies**

### **8.1 Can you confirm the process for converter Academies receiving their allocation?**

As you will be aware, bursary fund allocations are released in three instalments; in August, December and March, in a 50:25:25 split.

- Where a school that is identified on a Local Authority's Annex B or C converts at any point prior to August 2011 – their entire bursary fund allocation will be removed from the Local Authority and the new Academy will receive all 3 instalments direct from the YPLA.
- Where a school converts in August, September, October or November, their first bursary fund instalment (August) will be routed through the Local Authority; the second and third instalments (December and March) will be removed from the Local Authority and made direct to the Academy from the YPLA.
- Where a school converts in December, January or February, the first and second instalments (August and December) will be routed through the Local Authority; the third instalment (March) will be removed from the Local Authority and made direct to the Academy from the YPLA.

In summary, where a school converts in the month that the bursary fund instalment is due, that month's payment will continue to be routed through the Local Authority and any subsequent payments will be made direct to the Academy from the YPLA (and the Local Authority's payment adjusted accordingly).