

16-19 Bursary Fund

Questions & Answers for Schools, Academies, Colleges and Training Providers

1. What Management Information will we be required to return to the YPLA for the 16-19 bursary fund?

The details will be confirmed by YPLA but we expect that the arrangements will not be that much different from those for the current discretionary hardship funding – for example data on:

- How many vulnerable students were allocated the £1,200 bursary (either in full or pro-rated), and how much did they receive
- How many vulnerable students receiving the bursary were in each of the following categories:
 - receipt of income support
 - care leaver
 - in care
 - disabled student in receipt of both Employment Support Allowance and Disability Living Allowance
- How many students were supported by a discretionary bursary
- How many discretionary bursaries were granted
- How much was spent on discretionary bursaries in total
- How many discretionary bursaries were made for:
 - books/equipment,
 - additional course costs e.g. trips
 - transport
 - meals
 - accommodation – including whether this will be returned to provider once student received benefits
 - exam re-sit fees
 - other miscellaneous items – specify what

There will be a review of allocations early in 2012 and providers will be required to submit financial information for this purpose.

2. Will there be an audit by the YPLA?

The YPLA will gain assurance over bursary funding in the same way that it currently gains assurance over Discretionary Learner Support funding.

3. How do we identify students eligible for the £1,200 bursary?

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

- a letter setting out the benefit to which the young person is entitled;
- 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.

4. 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.

5. 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.

6. 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 will retain a small contingency fund (£7.5m in 2011/12) to cover the costs of bursaries for the most vulnerable young people 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. A review of allocations and the number of bursaries awarded by each provider will be carried out early in 2012.

7. How do I apply for additional money from the YPLA contingency?

If you think there is an error with your allocation, we will check this as soon as we are able and get back to you. If this is the case, we will correct it. If you think there are special reasons why you should have a larger allocation, we will note this but we do not plan any immediate adjustments. Instead we will review this as an overall picture develops.

8. What if we overspend or under spend our allocation?

There will be a review of allocations early in 2012 at which point it may be possible to redistribute some funding. The process for accessing additional funding before that point will be communicated to providers in due course.

9. Young people from the 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.

10. 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.

11. 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 a vulnerable group and other students alike.

12. 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 cashless means, 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.

13. 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.

14. 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.

15. 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 ensure to ensure that students aren't prevented from attending learning because there's no transport available, or because they can't afford the fares.

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.

16. 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.

17. 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.

18. 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.

19. What support is a student entitled to apply for if they are living in England and studying in Wales/Scotland?

English students studying at colleges in Wales and Scotland will be eligible to apply to the appropriate discretionary support scheme operated by their college. Students at school in Wales (where the school does not have access to a discretionary support scheme) may apply for a 16-19 bursary via their local authority. The local authority will need to request access to the contingency from YPLA. The process for this will be communicated in due course.

20. 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 Programme-led Apprenticeship or an Access to Apprenticeship pathway are eligible to apply for bursary support.

21. I did not have any learners on EMA in 2009/10 but I have learners in hardship and no allocation – how do I apply for one?

Where this is the case, we will consider making funds available from the contingency held by YPLA. The process for new providers to access funding will be communicated shortly.

22. I did not have any learners on EMA in 2009/10 and I have been given an allocation – how has it been calculated?

You may previously have received discretionary learner support funding. The allocations for the 16-19 Bursary Fund have been made to ensure that no provider receives less under the 16-19 Bursary Fund in 2011/12 than they did under the arrangements for Discretionary Learner Support Fund in 2010/11.

Where possible, eligible new providers who did not administer EMA in 09/10 have been given an allocation of the bursary fund. This has been based on an average proportion of learners who claimed EMA at £30 per week.

23. I am a Private/ Independent/ Non-Standard Institution (EMA) and had learners in receipt of EMA in 2009/10 and 2010/11 but I have not been given an allocation – why not?

We will be writing to those institutions this applies to.

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

Should a learning provider demonstrate that its provision would meet eligibility, allocation of the funding will be considered.

24. 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.

25. As a school, college or training provider how will I be made aware of our allocation and if we are to receive one?

A letter will be/has been sent to each provider, including Academies, confirming the level of their allocation.

Funding for bursaries for students in maintained school sixth forms will be paid via local authorities, who will pass the designated funding directly to the school. The school is then responsible for administering the fund. Local authorities will also be allocated funds, as appropriate, to cover students in maintained Pupil Referral Units, maintained Special Schools and a small number of other providers for whom the LA is best placed to administer the bursaries.

Where a provider operates out of more than one location across England, or through sub-contracts, the allocation will be made to the lead office for distribution to each site. Messages confirming that allocations letters have been issued to providers will be sent out to existing EMA providers by email, on the YPLA website, in the YPLA bulletin and to representative organisations such as AoC, LGA, ALP, NAMSS.

26. It seems unfair that some colleges are advertising their own internal bursary fund – we cannot compete with that: what does DfE plan to do to overcome this and ensure that some colleges do not have a competitive edge?

There is no reason why a provider cannot add to the Bursary Fund from other financial resources, so as to make even more financial help available to young learners.

Beyond the payments to young people in the identified vulnerable groups, the 16-19 Bursary fund is discretionary. Schools, colleges and training providers are able to determine how it is allocated to young people. We will be monitoring the use of the 16-19 Bursary funding in its first year.

We understand that the Association of Colleges is currently working with a group of colleges to develop models for administering the bursary which will offer examples that providers can follow if they wish. Similarly, we are aware that the London Councils are working to establish a common set of practices around bursary administration and allocation in London.

We would encourage schools and colleges to work together to develop local approaches to operating the funding.

27. I am confused about the arrangements for continuing EMA next year: 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.

In a rolling programme over late June and July 2011, Notices of Entitlement (NoE) will be issued to those students who are eligible to continue to receive weekly payments under the transitional arrangements.

The Learner Support Service will write to all students who will not be eligible to continue to receive weekly payments to confirm this to them and to advise that they may be able to receive support from the 16-19 bursary fund.

Where a student has turned 19 before the start of the 2011/12 academic year, they will not be eligible to continue to receive weekly payments and they will not be sent a NoE.

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.

28. Will the YPLA be writing to EMA learners to tell them of the new arrangements for next year?

In a rolling programme over late June and July 2011, Notices of Entitlement (NoE) will be issued to those students who are eligible to continue to receive weekly payments under the transitional arrangements.

The Learner Support Service will write to all students who will not be eligible to continue to receive weekly payments to confirm this to them and to advise that they may be able to receive support from the 16-19 bursary fund.

29. If any of my students are eligible for continued EMA next year, instead of taking them off EMA and giving them £1,200 from the 16-19 bursary funds, would it be acceptable for these students to keep their EMA and for providers to top up to £1,200?

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 will hold 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.

30. Will the YPLA be letting learners know about the new bursary fund? Or is this the responsibility of providers?

The letters to EMA recipients will include advice about support from the 16-19 bursary fund.

Because the funding is essentially discretionary, communications from providers will be the main way that many young people hear about the 16-19 Bursary Fund.

We would therefore encourage providers to raise the awareness of the 16-19 Bursary Fund, including locally set eligibility criteria, amongst young people, particularly the most vulnerable.

Aside from that, YPLA and DfE will be developing communications activities focusing on raising awareness of the 16-19 Bursary funding among young people and the professionals who work with them.

31. 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 year and responses confirmed that allocations based on this methodology would be preferred.

It does not affect the overall coverage of the 16-19 Bursary Fund, which is sufficient (as an illustrative figure) to allow bursaries of £800 to all young people who were in receipt of Free School Meals in year 11.

32. I have students who are now classed as vulnerable, but they will be eligible for EMA next year. Do I have to give them £1,200?

Where a student is in one of the identified 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 receiving EMA payments under the transitional arrangements in 2011/12 and becomes classed as vulnerable during the year, the provider should pro-rate any subsequent 16-19 bursary awards.

33. 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.

34. Even after I have allocated funds to the most vulnerable students my allocation does not seem to be sufficient: can I have extra funding?

The YPLA will retain a small contingency fund (£7.5m in 2011/12) to cover the costs of bursaries for the most vulnerable young people 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. A review of allocations and the number of bursaries awarded by each provider will be carried out early in 2012.

35. What is the definition of a care leaver? How long does a student need to be out of care to still qualify for a bursary?

Care Leavers are:

- young people aged 18-21 who have been looked after for 13 weeks or more since the age of 14, or
- young people who cease to be looked after or accommodated.

36. 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 group of young people identified as vulnerable for the purposes of the £1,200 is final.

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 can award £1200 (or more) to a learner who has major financial difficulties but is not in one of the defined vulnerable groups.

37. What about asylum seekers? Are they eligible for the bursary?

The residency criteria for the bursary fund are in line with the criteria in the YPLA Funding Guidance 2011/12: Funding Regulations. If a student that is an asylum seeker is also in one of the identified vulnerable groups, then they will be eligible for a £1,200 bursary.

Schools, colleges and training providers will be able to use their discretion to award bursaries to young people who are not in one of the identified vulnerable groups.

38. Since the announcement that the bursary fund can be used for transport, our local authority has withdrawn all/ some financial support for transport for 16-19 students. Our allocation will now be swallowed up by demands for transport support - can we therefore have extra funding?

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 ensure that students aren't prevented from attending learning because there's no transport available, or because they can't afford the fares.

Local Authorities are required to prepare and publish a transport policy statement each

year that specifies what arrangements for the provision of transport, and for financial assistance towards transport costs, they consider necessary to facilitate the attendance of young people of sixth form age.

We would advise parents and students who feel that their local authority's transport provision is placing a barrier upon their access to education, to lodge an appeal with the local authority in the first instance.

39. 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.

40. 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.

41. 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.

42. I subcontract some of my provision to another provider: they currently have a large number of learners in hardship but my allocation does not reflect this as those learners did not receive EMA in 2009/10. Can this allocation be adjusted?

The process for accessing additional funding and for accessing funding for the first time will be communicated to providers in due course.

All provision must meet the eligibility criteria (be eligible for public funding and subject to inspection by a public body that assures quality e.g. Ofsted).

A review of allocations and the number of bursaries awarded by each provider will be carried out early in 2012, at which point providers will be asked to put their requests for additional funds in writing to the YPLA. Further information will follow about this later in the year.

43. How will the 2012/13 allocations be calculated when there will be no similar EMA data?

We will be reviewing the allocations methodology for future years following monitoring of

the implementation of the current scheme.

44. 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**

45. Where a learner is on a course for more than 1 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.

46. Will you be publishing a list of all school, college and training providers' allocations? If so, when and where?

We plan to publish the finalised details of provider allocations for the 16-19 Bursary Fund alongside the allocations for participation funding in August. These will be published on the YPLA Extranet.

47. 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 process for accessing additional funding for new and existing providers will be communicated in due course.

48. 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 eligible for public funding and subject to inspection by a public body that assures quality (e.g. Ofsted).

49. The consultation document said that £180m was available for the Bursary Fund in 11/12, with an additional £194m for the transitional support arrangements for young people currently in receipt of EMA. But now it appears that the £180m includes the transitional support – what has happened to the £194m?

2011/12 is a transitional year. A large number of the young people who might be expected to benefit from the Bursary Fund will be receiving weekly payments as a result of the transitional support arrangements

The £115m that we will allocate to schools, colleges and training providers is sufficient for them to pay guaranteed bursaries to all vulnerable young people, to pay discretionary bursaries to young people starting post-16 education or training for the first time, and to 'top up' those weekly payments for young people currently in receipt of EMA if they consider it appropriate to do so.