

16-19 Bursary Fund

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

v.8 25 October 2011

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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.

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.

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 are 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.

It is anticipated that the young person will 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 the local authority which looks after them or provides their leaving care services.

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).

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 £1200 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, for most UASC, their asylum claim will not be decided in their favour and 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 eligible for public funding and subject to inspection by a public body that assures quality (e.g. Ofsted).

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

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 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

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 1st August 2011 or who started a Programme-led Apprenticeship before 31st 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.

2.8 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 from 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

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.

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 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 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?

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).

See Section 6 regarding requesting additional funding.

4.6 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.

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 Requesting Additional Funding - 2011/12 Bursary Fund In-year Review – October 2011

The YPLA is currently (during October 2011) undertaking the collection of Management Information for the 16-19 Bursary Funds.

The information provided in the in-year review of funding will be used to ensure that all learning providers have sufficient funds to make £1,200 bursary payments to students in the identified vulnerable groups and to retain some funds to make discretionary bursaries.

Where a provider's Bursary Fund allocation is insufficient to meet the number of £1,200 bursaries identified via the in-year review of funding, the YPLA will release additional funding. The information submitted via the in-year return will be used to inform future year's allocations.

The following information is to be submitted:

- the total number of students from the defined vulnerable groups that have been approved for payment of a full £1,200 bursary
- the total number of students from the defined vulnerable groups that have been approved for payment of a pro-rata'd £1,200 bursary
- the total amount of funding that has been approved for pro-rata'd £1,200 bursaries only

Providers will be able to complete and submit the in-year return from 1 October 2011. Returns should be submitted **by 31 October 2011**.

This data collection is being undertaken via a secure web portal which requires a user name and password.

6.2 How do we access the MI Portal?

The web portal can be accessed at: <http://dls.ypla.gov.uk/data>.

The web portal has been used previously to collect Management Information returns for discretionary Learner Support funds (dLS). Providers who have used the portal to submit these returns have had their access details migrated to the updated portal and should continue to use the same user name and password as previously. If you have forgotten your user name and password you will be able to reset it from 1 September using a 'Reset password' link on the sign-in page.

If you are accessing the portal for the first time and do not have a user name and password you will need to take the following action:

- Access the 16-19 Bursary Funds MI portal by following this link: <http://dls.ypla.gov.uk/data>
- Select the 'Apply for a new account' link on the home page. Enter your details on the access request form and submit it.
- If your access request is successful, you will receive an e-mail confirming your access has been granted. If there are any problems with your request, you will receive an e-mail explaining why.

The return for the in-year review of funding is now available.

You should complete and submit the return by 31 October 2011.

If you experience any problems in accessing the web portal please contact the service desk by e-mailing: bursaryfundsupport@texunatech.com

6.3 Additional information for Local Authorities on Management Information Returns

Local Authorities will need to submit returns for their own Bursary Fund allocation. Where Local Authorities have made allocations to the providers shown on their Annex C, the Local Authority is also asked to submit returns for these providers.

From 1 October 2011, when Local Authorities are logged into the portal, the MI return screen will show all providers (Annex C) that are 'linked' to the Local Authority by a Bursary Fund allocation. The Local Authority will be able to select each of these in turn, enter the relevant data and submit the return.

It is possible that the Local Authority may have allocated Bursary Funds to other providers who are not known to the YPLA and that therefore are not linked on the MI return. However, the Local Authority will be able to follow a simple process to add additional forms for these providers.

The YPLA recognises the arrangements which have been made in some areas and in order to support these has made changes to the web portal to enable Local Authorities to submit returns for Annex A/B providers if they wish to do so.

Local Authorities who do wish to do this are asked to contact the Service desk by e-mailing: bursaryfundsupport@texunatech.com, requesting to be linked to the relevant Annex A/B providers. When sending your email to the Service desk, please supply the full provider name as a minimum and their UPIN if possible. Additionally, please set your email subject in the following format: '<Enter your Provider name> - link to Annex A & B Provider', this will allow us to process your query as soon as possible.

The Service desk will then link all the requested providers to the Local Authority in the web portal and will notify the Local Authority when this has been completed.

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

Details of the in-year review, and the information required from providers is outlined in 6.1 above.

Management information may be required at the end of the 2011/12 academic year. We will issue information on this as this is available.

6.5 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 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.

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 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 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?

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 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.

7.3 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 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 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).

9. Miscellaneous

9.1 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 are aware that the London Councils are working to establish a common set of practices around bursary administration and allocation in London. The Association of Colleges has produced an administration advice document, which offers examples for administering the bursary that providers can follow if they wish. This document is available via their [website](http://www.aoc.co.uk/en/newsroom/aoc_news_releases.cfm/id/77BA0202-5F54-4E27-B706E589F64A9F24/page/1) at http://www.aoc.co.uk/en/newsroom/aoc_news_releases.cfm/id/77BA0202-5F54-4E27-B706E589F64A9F24/page/1

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

9.2 Will the YPLA offer any other support to providers in implementing this scheme?

The YPLA have produced a Q&A for young people and parents, to help providers answer queries.

The Department for Education (DfE) has produced a factsheet, leaflet and poster aimed at young people giving information on the new Bursary Fund.

9.3 Has the 16-19 Bursary Fund replaced the 16-18 discretionary Learner Support fund that we received last year?

Yes, 16-18 discretionary Learner Support has been replaced by the 16-19 Bursary Fund for academic year 2011/12 onwards.

