

16 to 19 Bursary Fund guide: 2017 to 2018 academic year

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Guidance for all institutions administering the 16 to 19 Bursary Fund in the 2017 to 2018 academic year.

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Who this guide is for

This guide is for all institutions that administer the 16 to 19 Bursary Fund. This includes schools, academies, further education (FE) colleges, sixth-form colleges, training providers, specialist independent providers and local authorities. Education and Skills Funding Agency (ESFA) calls all of these institutions throughout this guide.

This guide is non-statutory. However, ESFA expects institutions to use it as the basis of their bursary policies and to be able to show they comply with it at any audit.

16 to 19 Bursary Fund: changes for 2017 to 2018

Institutions are reminded that 2 groups of students aged 19 or over on 31 August 2017 are eligible to apply for help from discretionary bursaries: those who are continuing on a study

programme they began aged 16 to 18 ('19+ continuers') and those who have an Education Health and Care Plan (EHCP).

ESFA has changed the source data used to generate discretionary bursary allocations for maintained special schools. These were previously on local authority place notifications of high needs students but for the new academic year are based on census data (2016 to 2017 S02).

16 to 19 Bursary Fund summary

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

There are 2 types of 16 to 19 bursaries:

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

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

To be eligible for the bursary students must:

- be aged 16 or over but under 19 at 31 August 2017 or
- be aged 19 or over at 31 August 2017 and have an Education, Health and Care Plan (EHCP)
- be aged 19 or over at 31 August 2017 and continuing on a study programme they began aged 16 to 18 ('19+ continuers')
- meet the residency criteria in ESFA 2017 to 2018 academic year funding regulations for post-16 provision
- be participating in provision that is subject to inspection by a public body which assures quality (such as Ofsted), the provision must also be either
 - funded directly by ESFA or by ESFA via a local authority
 - otherwise publicly funded and lead to a qualification (up to and including Level 3) accredited by Ofqual or pursuant to Section 96 or the Learning and Skills Act 2000
 - a 16 to 19 traineeship programme

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

- in care
- care leavers

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

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

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

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

In the 2014 to 2015 academic year, additional funding for free meals for post-16 students attending further education funded institutions was introduced to provide parity with those young people attending school sixth-forms. In the 2016 to 2017 academic year, ESFA removed the ring fence between the free meals in further education allocation and the discretionary bursaries allocation. This flexibility remains in place for the 2017 to 2018 academic year.

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

Eligibility criteria: all bursaries

This section covers the basic eligibility requirements of the scheme (which mirrors eligibility for publicly funded 16 to 19 education and training). These criteria apply to both types of bursary – discretionary and vulnerable – unless otherwise noted.

Age

To be eligible to receive a bursary in the 2017 to 2018 academic year the student must be aged 16 or over but under 19 at 31 August 2017.

Students aged 19 or over are only eligible to receive a discretionary bursary if they:

- are continuing on a study programme they began aged 16 to 18 ('19+ continuers')
- have an Education, Health and Care Plan (EHCP)

These 2 groups of students can receive a discretionary bursary while they continue to attend education (in the case of a 19+ continuer, this must be the same programme they started before they turned 19), as long as their eligibility continues and their institution considers

they need the additional support to continue their participation. Students aged 19 or over are not eligible for the vulnerable student bursary.

Residency

Students must meet the residency criteria in [ESFA funding regulation](#) for post-16 provision in the 2017 to 2018 academic year. This document also specifies the evidence institutions must see and retain for audit to confirm eligibility.

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

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

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

Unaccompanied asylum seeking children

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

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

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

Eligible education provision

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

- funded directly by ESFA or by ESFA via a local authority
- funded or co-financed by the European Social Fund

- otherwise publicly funded and lead to a qualification (up to and including level 3) accredited by Ofqual or is pursuant to Section 96 of the Learning and Skills Act 2000
- a 16 to 19 traineeship programme

Specific groups of students: eligibility questions

This section addresses common questions from institutions about whether particular groups of students are or are not eligible for the 16 to 19 Bursary Fund.

Students aged under 16

Institutions should generally only pay bursaries to students aged 16 or over. However, in exceptional circumstances institutions may use their discretion to pay bursaries to younger students, for example, where a student is following an accelerated study programme. Exceptional circumstances do not include students aged 14 to 16 who are attending college as part of their key stage 4 programme.

Students aged under 19 studying higher education qualifications

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

Students aged 19 and over at 31 August 2017 in the 2017 to 2018 academic year

Students who are aged 19 and over on 31 August 2017 are not eligible for support from the 16 to 19 Bursary Fund unless they:

- have an Education, Health and Care Plan (EHCP) and are attending eligible education provision; or
- are a 19+ continuer, in other words, a student who is continuing on an eligible study programme they began aged 16 to 18

Other students aged 19 and over may be able to access adult Discretionary Learner Support. Students should talk to their institution to establish what help may be available to them.

No students aged 19 or over are eligible to receive a vulnerable bursary.

Students on distance learning programmes

Institutions should only award students on distance learning study programmes a bursary where there are specific financial barriers that prevent the student from participating in the programme. Most students on distance learning provision do not have the kinds of costs which the bursary fund is intended to cover, for example, transport, equipment and uniforms.

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

Students on apprenticeships and traineeships

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

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

Young offenders

Young offenders can apply for a bursary if they:

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

Young offenders cannot apply for a bursary if they:

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

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

Prince's Trust Team Programme

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

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

Residents of Scotland

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

[Education Maintenance Allowances](#) (EMA). These students are not eligible to apply for support from the 16 to 19 Bursary Fund.

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

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

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

Residents of Wales

If a student lives in Wales and travels to study at an English institution, they should approach their home local authority to make an application for [Welsh EMA](#). Students may also apply to their English institution for help from the 16 to 19 Bursary Fund discretionary bursary, but are not eligible for a vulnerable student bursary. Institutions should consider any support the students is receiving from Wales before making any bursary award.

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

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

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

Vulnerable bursaries

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

The defined vulnerable groups are students who are:

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

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

Institutions are responsible for assessing if students are eligible to receive a vulnerable bursary payment and for retaining evidence to support the decision. Institutions must submit a funding claim form to the SBSS to draw down vulnerable student bursary funds once they have confirmed eligibility.

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

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

Equally, institutions may decide that although a young person may be eligible for a vulnerable bursary because they are in one or more of the defined vulnerable groups, they do not have any actual financial need and so are not eligible on that basis. For example, their financial needs are already met and/or they have no relevant costs. [Young people in the defined vulnerable groups who don't require bursary funding](#) provides more information.

Defining in care and care leavers

The 16 to 19 Bursary Fund defines 'in care' as:

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

A 'care leaver' is defined as:

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

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

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

Foster care, including privately arranged foster care

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

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

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

Universal Credit

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

UC award notifications do not include any information on the benefits they replace. Institutions are advised to ask any student claiming a vulnerable bursary based on a UC award to confirm which benefit it has replaced in order to correctly identify which, if any, defined vulnerable group they fall into.

Institutions are reminded that any student whose UC award is in place of Employment and Support Allowance must also be receiving Disability Living Allowance or its replacement, Personal Independence Payment, to be eligible for a vulnerable bursary.

If the student has been awarded UC to pay for housing costs (in other words, UC has been awarded in place of Housing Benefit), the student is not eligible for a vulnerable bursary unless they are also receiving another eligible benefit.

If the student doesn't know why they have been awarded UC or what benefit it may have replaced, institutions should treat it as a replacement for Income Support and treat them as a student in this defined vulnerable group.

ESFA recognises that amendments will be needed for 2 of the defined vulnerable groups to ensure they reflect the ongoing implementation of UC. Any changes will be notified via an update to this guide.

Identifying vulnerable students

Institutions are responsible for identifying students in the defined vulnerable groups.

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

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

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

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

Evidence of eligibility

Institutions must obtain proof that students are eligible for a vulnerable bursary. Institutions should ask for evidence from each student and retain copies for audit purposes. For example:

- for students in receipt of qualifying benefits, a letter from DWP that states the benefit the student is entitled to (they must be entitled to the benefits in their own right). The evidence must confirm that the young person can be in further education or training (some young people in receipt of benefits are not allowed to participate)
- for students who are in care or a care leaver, written confirmation of their current or previous looked-after status from the relevant local authority - this is the local authority that looks after them or provides their leaving care services. The evidence could be a letter or an email but must be clearly from the local authority. Institutions should only submit a vulnerable bursaries funding claim to the SBSS when they have seen and verified appropriate evidence that the student is eligible.

Pro-rata vulnerable bursaries

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

- a 30 week programme attracts a vulnerable bursary of £1,200 - if paid weekly, the bursary is $£1,200 \div 30 = £40$ per week
- if a student is on a 10 week programme, the pro-rata bursary would be $£40 \times 10$ weeks = £400. Institutions can assess the amount of bursary using an hourly or daily rate if a vulnerable student is on a part time course. For example:
- a student on a full-time course which lasts for 20 weeks - their bursary should be calculated at the rate of $£40 \times 20$ weeks = £800
- a student on a part-time course that takes 2 days a week and lasts for 20 weeks - if the daily rate for the bursary is £8 ($£40 \div 5$ days = £8), then $£8 \times 2$ days = £16 a week; $£16 \times 20$ weeks = £320

Young people in the defined vulnerable groups who don't require bursary funding

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

For example:

- a student attending specialist residential provision that covers their educational costs in full
- a student taking a distance learning programme and who has no financial barriers to participation (for example, they don't have any travel costs or meal costs)
- a student in local authority care whose educational costs are covered in full by the local authority

If a student, or the student's parents, still wants to claim a vulnerable student bursary, institutions should consider the particular circumstances in each case and assess whether no

bursary should be awarded (because the student has no financial needs) or to award a reduced amount of bursary (because the financial help needed is limited).

In these instances, institutions should clearly explain to all parties the aim of bursary funding and why no bursary is being awarded or why a reduced bursary is being paid.

Institutions may wish to state in their application form that there is possibility of no award, or a limited award, of the vulnerable bursary being the outcome of an application. This ensures all parties are clear that meeting the vulnerable bursary criteria does not automatically mean funding will be given.

Drawing down vulnerable bursary funding from the SBSS

The SBSS hold the funding for vulnerable bursaries centrally. Institutions should draw down vulnerable bursary funding from SBSS on demand, whenever they identify and verify new students who meet the vulnerable student criteria. Institutions can submit as many funding claims as they need to during the year.

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

Institutions should draw the funding down by completing and submitting a vulnerable bursary funding claim via the [SBSS online portal](#). Funding claim forms for the 2017 to 2018 academic year will be available from August 2017. The deadline for the submission of 2017 to 2018 academic year funding claims is 31 July 2018. Claims submitted after this date will not be paid.

The SBSS portal includes guidance on how to complete the funding claim form. If institutions need further help, they can contact the SBSS provider helpline on 0300 303 8610; by e-mailing: 1619bursary@studentbursarysupport.co.uk or use the online chat option.

All ESFA funded institutions in receipt of a discretionary bursary allocation in the 2017 to 2018 academic year and institutions delivering 16 to 19 traineeships in the academic year can submit a vulnerable bursary funding claim if they have eligible students. Payment may be dependent on whether an institution has signed and returned their ESFA funding contract.

Institutions who are not in receipt of a discretionary bursary allocation in the 2017 to 2018 academic year may submit a vulnerable bursary funding claim if they have eligible students. SBSS will make further checks before funding can be released.

Students placed in independent provision

Local authorities are responsible for submitting funding claims for vulnerable group students who they have placed in independent provision.

Independent education institutions are responsible for verifying that students are in one or more of the defined vulnerable groups. Once they have done this, they should contact the relevant local authority and confirm to them that the student is eligible. The local authority must have this confirmation before they can submit a funding claim. The institution could confirm eligibility by sending the local authority a copy of the evidence they have seen or by confirming to them that they have seen evidence to verify eligibility.

The SBSS will issue funding to the local authority if the funding claim is successful. Education institutions making vulnerable bursary funding claims through local authorities must ensure they liaise with the local authority finance contact to ensure the relevant bursary funds are redirected to them.

Processing and payment of funding claims

The SBSS carries out checks on the funding claim forms to verify that institutions are eligible to claim and that the claim has been completed correctly.

The SBSS will normally process a funding claim within 2 weeks. If the claim is successful they will issue a funding statement (which can be viewed in the SBSS portal) to confirm the amount to be paid.

The SBSS will only make payments to the institution's bank account as held by ESFA. No other bank account or method of payment is permitted.

Institutions can request a change to their bank account details by completing the [BAN1s form](#), or the [BAN1a form](#) (for academies). Completed forms should be e-mailed to StandingData.EFA@education.gov.uk.

The SBSS will issue a remittance advice for each successful funding claim. This document gives a breakdown by student ID of the individual payments and the overall amount of funding which will be paid. It also includes a payment reference number that institutions will see on their bank accounts. This allows easy tracking of payments.

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

Discretionary bursaries

Institutions make discretionary bursary awards to students to help them overcome the individual barriers to participation they face, for example help with the cost of transport, meals, books and equipment.

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

Setting and publishing eligibility criteria for discretionary bursaries

Institutions set their own eligibility criteria for discretionary bursaries, but must comply with the basic eligibility conditions of the scheme set out in this guide. They should always ensure that their bursary policy is designed to ensure funding reaches those students who are most in need of financial support. Institutions must also comply with the requirements of the Equality Act 2010 when setting their criteria and must not discriminate against their students, either directly or indirectly, because of their protected characteristics. Further information on the [Equality Act 2010](#) is available online. Students who apply for the bursary fund must be assessed individually and awarded a bursary based on their actual financial need. Institutions should document the assessment and retain the evidence they used in making the decision for audit purposes.

Institutions should publish a statement setting out how they will use their bursary fund. The statement should be published early enough for students to be able to use the information when deciding which post-16 institution to attend. The institution's eligibility criteria must be clear and available to students and to ESFA. The statement should clearly set out what type of help is being offered, for example, help with transport, books and equipment, field trips and other course-related costs and whether bursary support is available to contribute to the costs of attending university interviews and open days.

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

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

Institutions should remember that whilst the discretionary bursary can be used for transport costs where these are a barrier to participation, it does not replace the statutory transport duty local authorities have. Each local authority must publish an annual transport statement that sets out the arrangements they will make to facilitate participation in education or training for students aged 16 to 19. Institutions should consider the relevant local authority's transport statement when setting their bursary fund policy.

Working with other local institutions

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

Example of good practice include:

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

Using household income and income bands to establish award levels

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

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

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

In another college:

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

In a school sixth-form:

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

Other examples of good practice include:

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

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

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

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

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

There is no set limit for the amount of discretionary bursary that can be awarded to students. Institutions can award discretionary bursaries equal to or higher than the vulnerable bursary maximum as long as they stay within their overall budget and they have clearly identified an individual student requires this level of funding.

Institutions should also refer to [young people in the defined vulnerable groups who don't require bursary funding](#) for more information.

Young people with caring responsibilities

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

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

The impact of bursaries on DWP benefits

Institutions may wish to highlight to students and parents the impact of receipt of the 16 to 19 Bursary Fund on other benefits.

Receipt of bursary funding does not affect receipt other means-tested benefits paid to families, such as Income Support, Jobseeker's Allowance, Child Benefit, Working Tax Credit and Housing Benefit.

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

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

Paying bursaries to eligible students

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

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

It is good practice to pay in-kind bursaries rather than cash where possible. This helps ensure that the bursary is spent for the reasons it was awarded. In-kind payments can include travel passes, vouchers or credits for meals, required books and required equipment.

Institutions can specify that students must return books and equipment at the end of their study programme to be used again by other students where appropriate.

To give an example; if an institution decides IT equipment (a laptop or tablet) is necessary for the student to complete their study programme, it can be bought with bursary funds. However, the equipment should be returned to the institution once the student has completed the study programme for re-use by another student. If keeping a laptop or tablet on campus is the best way of ensuring this happens, institutions have the right to set this as a condition. Any IT equipment that is returned must be data cleansed before being re-issued to another student.

Where institutions make in-kind payments to students in the defined vulnerable groups, they should explain the value of the payments and how these have been deducted from the £1,200 to the student.

Where institutions make bursary fund payments to students rather than providing support in-kind, it is good practice to pay by BACS transfer to the student's own bank account. A basic bank account (which students can open at age 16) allows BACS transfers and allows the student to withdraw money. More information on basic bank accounts can be found at [British Bankers' Association](#)

ESFA does not recommend that large or lump sum bursary payments are made to students.

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

Institutions should ensure students and their families know who they should contact if they have any queries about payments.

Some examples of different payment approaches used by institutions are:

1. One institution involves carers and social workers in establishing the most appropriate way of getting the funding to the young person. At the beginning of term, if specialist equipment and/or a travel pass is needed, this is purchased by the college and the cost is deducted from the student's overall award. The remainder is paid to the student monthly or termly depending on need. In cases where a carer has responsibility for the young person's finances, meetings are set up with them to decide how payments should be made.
2. In another institution, every student who qualifies for a vulnerable student bursary is offered an interview with a financial support advisor to decide together on the best way to deliver their support. Priority areas are addressed first; travel to college, equipment costs and support with studies. Additional expenditure such as university visits is also discussed, and where money remains, an amount is retained for unforeseen costs.
3. One institution pays students receiving a vulnerable student bursary £20 per week via BACS. The institution also gives additional funds at the start of the course so students can pay for equipment and course-related items. Those in the vulnerable groups are also offered travel vouchers as part of their payments. The Student Services Team meet with the students regularly to help them with budgeting and identify any financial barriers that could be overcome through bursary funds. A percentage of the total bursary funding is kept back as a hardship fund to respond to emergencies that may arise later in the year

Conditions for receiving bursary funding

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

Institutions should ensure that they have evidence that a student has seen and agreed to the conditions. This might be an agreement signed by the student or a signed declaration which forms part of the institution's bursary application form. Copies should be retained for audit.

If an institution is concerned about a student's attendance or behaviour, it is good practice to talk to the student about the issue. Institutions can withhold payments if a student does not meet agreed standards, but they should always consider the individual circumstances of

the student first. The independent evaluation of the 16 to 19 Bursary Fund identified some students who had been sanctioned to the extent that their bursary funding had been stopped for a whole term. This is not recommended as it can stop students attending and undermine the purpose of the Bursary Fund.

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

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

Examples of best practice for payment conditions include:

1. One college has very clear terms and conditions for receipt of the bursary, which are highlighted on their application form. The college monitors this to identify any issues and consider whether additional support is needed. A minimum 85% attendance is the current standard but support may continue if a student's attendance falls below the requirement, and there is a valid reason for it, for example illness, a caring role or family problems.
2. In one school, at the start of their study programme, students sign a contract which states the rules they will abide by – including truthfulness, attendance and behaviour. If the student does not comply, in particular if there are absences, they are sent a text message informing them that their bursary may be withheld. Before any payments are stopped they are given an opportunity to explain their absence.

Exclusions - what the bursary can't be used for

Institutions cannot use the 16 to 19 Bursary Fund in any way that would give them a competitive advantage over other institutions. Examples include:

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

Institutions must not make block or blanket payments to students that do not take account of their actual financial need. The bursary fund is designed to support students who have a genuine financial difficulty that might prevent them from continuing in education. It is not designed to act as an incentive for attendance.

Discretionary bursary fund allocations

ESFA makes discretionary bursary allocations to institutions that already have a contract or funding agreement each year. ESFA will consider if institutions that are starting to deliver education and training for ESFA for the first time need a discretionary allocation when their contract or funding agreement is generated.

If an institution operates from more than one location across England, or operates through sub-contracts, ESFA will make the allocation to the lead office for distribution to each site. Institutions should ensure that any young people attending provision delivered by sub-contractors or at different sites are able to apply for the 16 to 19 Bursary Fund. It is the institution's responsibility to ensure that the bursary fund is administered appropriately at each site and at any sub-contractor.

Allocations methodology

ESFA has calculated discretionary bursary allocation for the 2017 to 2018 academic year for most institutions based on:

- the number of students that received £30 a week EMA in the 2009 to 2010 academic year, as a percentage of the 2010 to 2011 funded student numbers
- this percentage is then applied to institutions 2017 to 2018 allocated student numbers and multiplied by the 2017 to 2018 discretionary bursary funding rate of £298

For example: if the percentage is 40%, and there are 500 allocated student numbers, this generates an allocation based on 200 students x £298.

The discretionary bursary allocation is paid in 2 parts - two-thirds in August 2017; one-third in April 2018.

Converter academies

ESFA uses the same methodology to generate discretionary bursary allocations for academies as for other types of institution.

Allocations are also paid in 2 parts as for other types of institutions. The only difference is that the first two-thirds is paid in September 2017 (reflecting that this is the date of first payments generally made to academies). The final third is paid in April 2018.

Any school sixth-forms that become converter academies in September will have already received their first bursary payment in August (via the local authority as school sixth-forms). ESFA will make subsequent bursary payments directly to the academy.

Maintained schools

ESFA makes discretionary bursary allocations to maintained schools with an ESFA funded sixth-form through local authorities. Local authorities are asked to pass this bursary funding to the school.

Maintained special schools

ESFA has previously based bursary fund allocations for maintained special schools on local authority place notifications of high needs students. For the 2017 to 2018 academic year, ESFA will use census data (2016 to 2017 S02) as the basis for these allocations. ESFA will aggregate funding for students at maintained special schools in each local authority area and pay the total to each local authority; removing the need for local authorities to provide institution level place numbers in order to calculate bursary funding. Each local authority should use its local knowledge to divide this funding appropriately between their maintained special schools.

New institutions

ESFA will consider if institutions that start delivering education and training for ESFA for the first time in the 2017 to 2018 academic year need a discretionary bursary allocation when a contract or funding agreement is generated. Any allocation will depend on the nature of the programme being delivered.

To be eligible for an allocation, the institution must meet the eligible provision criteria set out in this guide. ESFA may also undertake a financial health assessment of the institution before deciding to allocate funding. Where institutions meet the criteria and wish to apply for an allocation they should contact our:

ESFA enquiries

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

For all enquiries for the Education and Skills Funding Agency

Administration fees

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

Institutions that are in scope for both the 16 to 19 Bursary Fund and free meals in further education schemes are permitted to use up to 5% of the single allocation they are given for these 2 schemes for administration.

Managing bursary underspends and recycling vulnerable bursary payments

Underspends

Institutions are permitted to carry unspent funds over to the next academic year. Any unspent funds that are carried forward must continue to be used to support students. Funds that are carried forward cannot be added to general institution funds.

Institutions given a single overall allocation for the 2016 to 2017 academic year that included funding for both free meals and discretionary bursary can carry forward funds from both schemes. The funding may be used for either free meals or discretionary bursary payments in the new academic year (2017 to 2018).

Institutions must fully utilise any unspent funds for either discretionary bursary or free meals before using their new academic year allocation.

ESFA wishes to remind institutions that discretionary bursary and/or free meals funding cannot be carried forward for more than one year. Institutions should contact ESFA to arrange to return any unspent funds they hold from any year prior to 2016 to 2017.

Recycling vulnerable bursary funds

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

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

Institutions are expected to recycle this funding and use it to offset funding claims to the SBSS for other vulnerable students until 30 April 2018. For example, rather than claiming £1,200 for a newly identified vulnerable student, the institution may already be holding £600 which they claimed for a student who has now left and is not now being used for that student. The institution should recycle the £600 for a new vulnerable group student, claiming only £600 from the SBSS to give them the total amount of funding they need.

Where an institution holds enough funds to cover the costs of a new vulnerable bursary in full they should still submit a funding claim form to the SBSS (showing a zero amount) to ensure ESFA has accurate information about the numbers of vulnerable students.

Institutions can add any vulnerable bursary funding they have claimed, but no longer need, for vulnerable students to their discretionary bursary allocation in the later part of the academic year - from 1 May 2018.

Institutions that have incorrectly claimed vulnerable bursary funds for a student (because they did not meet the criteria, for example) should try to recycle this funding against other vulnerable students on subsequent funding claims. However, if the institution has no other vulnerable students, the incorrectly claimed funds must not be added to their discretionary bursary allocation (because they were claimed in error). Instead, institutions should contact ESFA to arrange to return the funds: enquiries.efa@education.gov.uk

Best practice in administering the 16 to 19 Bursary Fund

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

Institutions delivering short programmes or roll-on roll-off provision should enable students to apply for help from the bursary fund at any point during the year.

Institutions must ensure that payments are made in a timely way, such as, not too late in the year for them to help students with the costs of participation.

Raising awareness/encouraging applications

Institutions should publish clear statements about their bursary fund policies. Policies should make clear to students that they are being supported by the 16 to 19 Bursary Fund and institutions should be mindful of this if they develop their own financial support branding.

Applications and information should be clear that students who meet the criteria for vulnerable bursaries are not automatically entitled to them if they do not have financial needs and/or their financial needs are covered from other sources.

Institutions may want to consider ways to encourage students to apply. Good practice suggestions include:

- setting up data sharing agreements with other agencies to help identify students with the greatest need for support and raise awareness of the bursary as early as possible
- setting up processes that maintain confidentiality and emphasising this message, so students don't feel embarrassed about applying

Examples of policies and procedures designed to raise early awareness of the bursary include:

1. A college has information about the 16 to 19 Bursary Fund on the college website and in the prospectus, as well as on posters that are on display around the college throughout the year. Information is distributed at open evenings for year eleven pupils from local schools. Further information, including an application form, is available following enrolment and all new entrants receive a text message and email about the 16 to 19 Bursary Fund soon after the start of the academic year.
2. In another college, as well as information about the 16 to 19 Bursary Fund being in prospectuses, posters for example, the college also works with local support services to target potential students who are homeless and provide them with information.

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

Free meals in further education

Additional funding for free meals for post-16 students at further education funded institutions was introduced in the 2014 to 2015 academic year.

ESFA removed the ring fence between the free meals in further education allocation and the 16 to 19 Bursary Fund discretionary bursary allocation in the 2016 to 2017 academic year. This flexibility remains in place for the 2017 to 2018 academic year. Institutions must manage the single allocation appropriately to ensure all eligible students are provided with a meal in line with the free meals guide.

Prior to the introduction of additional funding for free meals, institutions had supported the cost of meals for students who needed them from discretionary bursaries, as the external evaluation of the Bursary Fund reported. In the 2016 to 2017 academic year, ESFA adjusted discretionary allocations to take account of this double funding for those institutions also in receipt of an allocation for free meals. ESFA is making a similar adjustment in the 2017 to 2018 academic year.

Where possible, ESFA has based 2017 to 2018 academic year free meals funding for further education institutions on their 2015 to 2016 academic year full year data and their funded

student number for the 2017 to 2018 academic year. More information about the methodology is set out in the [free meals guide](#).

To make an adjustment for double funding, ESFA has calculated each institution's share (percentage) of the total number of students supported with free meals. This percentage has been applied to the adjustment figure to calculate the amount to be subtracted from the institution's discretionary bursary allocation.

ESFA has built in protection levels so no institution experiences a reduction greater than the amount deducted last year or greater than 25% of their 16 to 19 Bursary Fund allocation. ESFA has also ensured that no institution will have a discretionary bursary allocation that is less than £500. More detail about the methodology is set out in the funding statements issued to institutions in February/March 2017.

The free meals in further education funding rate of £2.41 remains the same in the 2017 to 2018 academic year. If institutions wish to enhance the rate to provide a meal with a greater value, they have the discretion to do so.

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

Institutions can give additional support to students who are eligible for a free meal from the Bursary Fund, if they assess they meet the criteria for a defined vulnerable group bursary or that they are facing significant financial barriers to participation and require support from the discretionary bursary.

Institutions should ensure they consider the provision of a free meal, or the funding provided to the student for the free meal, when they assess their overall need for support, whether from the vulnerable or discretionary bursary. Institutions should continue to use discretionary bursary funds to provide meals to students who are not eligible for free meals but for whom the absence of regular meals is proving a barrier to their participation.

Other student support schemes

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

Fraud, audit and management information

Fraud and misuse of funds

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

Institutions are responsible for investigating instances of fraud relating to bursary fund applications. If institutions find evidence that is misleading or fraudulent information that has been knowingly submitted by a student or parent, resulting in the student receiving a bursary they were not entitled to, they should attempt to recover the overpayment from the student.

Institutions that identify significant fraud should report it to ESFA. Significant fraud involves one or more of the following:

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

Audit

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

Institutions can record either that they have seen documentation to confirm bursary fund eligibility, for example, by using an eligibility checklist, or they can retain copies of the documentation (photocopies or scans). Where institutions record that they have seen documentation but they have not retained it, they must be fully aware of the implications of the document they are approving. Institutions should keep any hard or scanned copies of documentation (if this is their preference) for 6 years (records can be kept electronically).

Institutions should keep documentation that includes evidence of the application process, documents relating to how the student was assessed (including copies of any evidence used to determine eligibility) and the funds issued. Institutions should also retain copies of any documents the student has signed to give formal agreement to their conditions for payment.

Examples of documentation for the vulnerable bursary include:

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

Examples of documentation for the discretionary bursary include:

- copies of evidence used to assess entitlement, such as a letter from DWP, or evidence of household income
- a copy of the student's individual assessment of actual financial need
- receipts for purchases made, for example, bus pass, lunch receipts or book receipts

Institutions should apply their bursary fund eligibility criteria correctly and consistently to all students.

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

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

Management information

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

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

Complaints or appeals about the Bursary Fund

ESFA does not have a role in the administration of bursary funding as this is the responsibility of institutions and local authorities. ESFA does not usually get involved with complaints. Any student or parent who is unhappy with how an institution has handled an application for bursary funding should follow the institution's own complaints procedure.

Institutions should handle the escalation of complaints about the bursary fund in the same way as any other complaint they may receive. Institutions must have their own procedures in place that must be exhausted before approaching ESFA.

ESFA may get involved if there is an allegation that this guide is being seriously disregarded.

How to ask a question about the Bursary Fund

If institutions have a question that is not answered by this guide, please contact:

ESFA enquiries

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

For all enquiries for the Education and Skills Funding Agency

Institutions with any questions about completion of the vulnerable bursary funding claim or about vulnerable bursary payments made by the SBSS should contact SBSS on 0300 303 8610 or at: 1619bursary@studentbursarysupport.co.uk

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