



Procedure for the Administration of 16 – 24 Bursaries 2019-2020

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1. Introduction

This procedure provides guidance on how the College will administer Bursary grants used to help maintain a young person in education who might otherwise be unfairly disadvantaged.

The College receives two learner support fund allocations at the beginning of each academic year, to be distributed to eligible learners:

- 16-19 Bursary Fund
- 19+ Discretionary Learner Support Fund

Student Services administer the funds in accordance with the eligibility criteria.

Supporting Documents

- Bursary Fund Application Form
- 16 to 19 Bursary Fund guide
- 16 to 18 education: free meals in further education

Storage

All completed applications and supporting evidence must be processed in accordance with GDPR

- All documentation must be stored on a secure drive within the College network or in a locked cupboard in the Admissions Office
- Evidence of eligibility must be disposed of in confidential waste, once recorded against the learner record

2. 16- 19 Bursary Fund

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

There are 2 types of 16 to 19 bursaries:

- Bursaries for defined vulnerable groups of up to £1,200 a year
- Discretionary bursaries which institutions award to meet individual needs, for example, help with the cost of transport, meals, books and equipment

All learners are encouraged to apply for support from the Bursary Fund. This is achieved by:

- A bursary form being sent to all learners as part of their new learner/returning learner information pack
- Inviting parents/carers to attend drop-in sessions during the summer holiday for assistance to complete the application form and/or to check eligibility
- Application forms being available and visible within Student Services throughout the academic year
- Progress Coaches encouraging learners to apply
- Promoting the Funds internally for example on the Student Services Noticeboard

Vulnerable Bursary

Criteria

Learners aged 16 – 18 on 31 August can apply for a bursary payment of up to a maximum of £1,200, if they are on a study programme which lasts for 30 weeks or more in the academic year and meet the residency criteria as described in ESFA funding regulations.

To be eligible the learner must meet one of the following criteria:

- To be in care
- To be a care leaver
- Receiving Income Support, or Universal Credit, because they are financially supporting themselves or financially supporting themselves and someone who is dependent on them and living with them, such as a child or partner
- Receiving Disability Living Allowance or Personal Independence Payments in their own right, as well as Employment and Support Allowance or Universal Credit in their own right

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 some cases, a young person might be eligible for a bursary for 'vulnerable groups' because they meet one or more of the criteria. However, their financial needs may already be met and/or they have no relevant costs, for example a learner in Local Authority care whose educational/transport costs are covered in full by the Local Authority. In such cases, it may be decided that they do not need support from the scheme.

Payment

- Payments can be made in either monthly or termly instalments directly to the learner/parent/carer bank account
- If the learner does not have a bank account, payments can be made by petty cash
- Payments can be made weekly, monthly or termly and are subject to a minimum attendance of 85%

Deadline

The ESFA deadline for the submission of funding claims is 31 July at the end of the academic year for which the vulnerable bursary is being claimed. Claims submitted after this date will not be paid. In order to process all bursary applications in a timely manner, a deadline of the first week in August, before the beginning of term, will be set for the receipt of application forms.

Discretionary Bursary

Criteria

Learners are eligible to apply to the Discretionary fund dependent upon household income and the learner's needs.

- Priority will be given to learners with a household income of less than £21,000, but applications from all learners will be considered
- Financial assistance can be requested for:
 - Travel to College eg. (bus pass or contribution to L A assisted transport)
 - Books and equipment
 - Food
 - Trips related to the study programme.
- Equipment should be discussed with the relevant curriculum or support department to ascertain needs and requirements
- Trip requests should be discussed with the relevant curriculum/support department to ascertain the needs and requirements of the trip

Interns – if eligible for the bursary, interns can receive support with their transport and meal costs whilst at their place of work (as well as at College). Evidence of travel costs are required and receipts for food purchased (which will be reimbursed up to the value of a free College meal).

Payment:

- Payments are made at the beginning of each term. Continuing financial support for Term 2 and Term 3 will be dependent on satisfactory reports (from Progress or Job Coaches) for attendance and effort. Attendance is to be over 85% for ongoing financial support to continue
- Payments will be made to learners/parents/carers via their bank account
- Where possible the College will aim to pay supplier or service providers directly
- Where direct payment is not possible cheques will be raised in the supplier's/provider's name
- Where the above is not possible, receipts should be requested for expenditure
- Where petty cash forms are used, copies of the forms should be retained and receipts requested for goods purchased
- The Catering department is notified of those learners eligible for free meals; the College is invoiced for the cost by the Catering department

Deadline

There is no deadline for when an application can be made throughout the academic year; however, allocation of funds are subject to availability. In order to process all bursary applications in a timely manner, a deadline of the first week of August will be set for the receipt of application forms.

3. 19+ Discretionary Learner Support Fund

Criteria

As set by the ESFA, learners may be allocated an award from this fund if:

- The learner has an income of less than £21,000
- Necessary items of equipment have been discussed with the relevant curriculum/support department to ascertain the need and requirements
- In the case of trip requests, discussions with the relevant curriculum/support department to ascertain the needs and requirements of the trip have taken place

Payment

- Payments are made at the beginning of each term. Continuing financial support for Term 2 and Term 3 will be dependent on satisfactory reports (from Progress Coaches) for attendance and effort. Attendance is to be over 85% for ongoing financial support to continue
- Where possible the College will aim to pay supplier or service providers directly
- Where direct payment is not possible, cheques will be raised in the supplier's/provider's name

- Where the above is not possible, receipts should be requested for expenditure
- Where petty cash forms are used, copies of the forms should be retained and receipts for goods purchased requested
- The cost of meals are credited to a learner's ID card and the Catering team are informed

Deadline

There is no deadline to when an application can be made throughout the academic year; however, the allocation of funds are subject to availability. In order to process all bursary applications in a timely manner, a deadline of the first week of August will be set for the receipt of application forms.

Process

Both the 16 -18 and 19+ Learner Support Funds will be administered by the Student Services Department and will be processed by the Finance Department.

4. Free Meals in Further Education

Criteria

Learners are eligible for free meals for each day they attend college if they are:

- Aged between 16 and 18 on 31 August. Learners who turn 19 during their study programme will remain eligible for a free meal until the end of the academic year in which they turn 19, or to the end of their study programme, whichever is sooner
- Aged 19 - 24 as at 31 August and have an Education Health and Care Plan (EHC Plan) and ESFA learners aged between 16 and 18 on 31 August are also entitled to a free meal while attending their provision if they meet the eligibility criteria
- **Interns** – if eligible for the bursary Interns can receive a free meal whilst at their place of work (as well as at College). Receipts for food purchased will be reimbursed, up to the value of a free College meal.

Free meals are targeted towards disadvantaged learners. 'Disadvantage' is defined as learners being in receipt of, or having parents who are in receipt of, one or more of the following benefits:

- Income Support
- Income-based Jobseekers Allowance
- Income-related Employment and Support Allowance (ESA)
- Support under part VI of the Immigration and Asylum Act 1999
- The guarantee element of State Pension Credit
- Child Tax Credit (provided they are not entitled to Working Tax Credit and have an annual gross income of no more than £16,190, as assessed by Her Majesty's Revenue and Customs (HMRC))
- Working Tax Credit run-on – paid for 4 weeks after someone stops qualifying for Working Tax Credit
- Universal Credit with net earnings not exceeding the equivalent of £7,400 pa

The following groups of learner are not eligible for a free meal:

- Learners aged between 14 and 16 (these learners are already covered by different provision, i.e. Free School Meals (FSM))
- **However, for 14 – 16 learners who may be attending the College whilst still on the school role, the cost of a free school meal can be recovered from the school. The Finance department will invoice the school, based on information provided by the Catering department**
- Learners aged 19 or over at the start of their study programme, unless they have an EHC Plan.

- Apprentices, including those with an EHC Plan

Payment

- The Catering department is notified of those learners eligible for free meals; the College is then invoiced for the cost

Process

Learners who are eligible for free meals in further education can apply using the 16-19 bursary application form. The fund will be administered by the Student Services Department and processed by the Finance Department.

APPENDIX 1



1. [Home](#)
2. [Education, training and skills](#)

Guidance

16 to 19 Bursary Fund guide: 2019 to 2020 academic year

Guidance for all institutions administering the 16 to 19 Bursary Fund in the 2019 to 2020 academic year.

Published 15 April 2019

From:

[Education and Skills Funding Agency](#)

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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: a summary

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

There are 2 types of 16 to 19 bursaries:

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

Key points for the 2019 to 2020 academic year

The Department for Education (DfE) made additional bursary funding available to institutions delivering industry placements in the 2018 to 2019 academic year. DfE will also be providing additional funding in the 2019 to 2020 academic year. This funding helps ensure institutions are able to meet potential increased demand from students who may need to travel further to access their placement and/or incur additional participation costs, such as for equipment or clothing. Institutions must ensure the additional bursary funding is used in line with the 16 to 19 Bursary Fund rules set out in this guide and not guidance related to CDF.

Institutions must ensure they assess the needs of individual students when awarding bursary funding. ESFA audit and assurance work and ongoing monitoring/feedback activity by DfE has found a considerable number of institutions are making flat rate payments to students without any consideration of individual student needs. The bursary fund is designed to help students overcome the individual financial barriers to participation that they face and ensure the funds go to those who genuinely need them.

Eligibility criteria: all bursaries

Age

A student must be aged 16 or over but under 19 at 31 August 2019 to be eligible for help from the bursary fund in the 2019 to 2020 academic year.

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') or have an Education, Health and Care Plan (EHCP).

These 2 groups of aged 19+ 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 support to continue their participation.

Students aged 19 or over are not eligible for bursaries for vulnerable groups.

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 enrolled on higher education qualifications are not eligible for support.

Eligible education provision

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 on the ESFA list of qualifications approved for funding 14 to 19
- a 16 to 19 traineeship programme

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

Non-employed students aged 16 to 19 who are participating in a Prince's Trust Team Programme are eligible to receive the bursary in the same way as any other student participating in an eligible, publicly funded course.

ESFA does not expect students on distance learning provision to need help from the bursary fund. This is because they do not have the kinds of costs the bursary is intended to cover (travel, equipment and uniforms, for example). In the rare instances where an institution identifies that such a student does require financial help, institutions should provide support should in-kind rather than by cash payments. An example could be providing a temporary travel pass for the student to attend exams.

Residency

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

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 bursary for vulnerable groups ('in care' group), where they have a financial need.

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 bursary as a student from a vulnerable group 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/the appeals process exhausted, an individual has no entitlement to public funds (with a few exceptions where the withdrawal of support would be seen as a breach of human rights).

Eligibility criteria: bursaries for young people in defined vulnerable groups

Students who meet the criteria, and who have a financial need, can apply for a bursary for vulnerable groups. The defined groups reflect that these students may need a greater level of support to enable them to continue to participate. Institutions must ensure students are eligible for the bursary for defined vulnerable groups in each year they require support.

The defined vulnerable groups are students who are:

- in care
- care leavers
- receiving Income Support, or Universal Credit because they are financially supporting themselves or financially supporting themselves and someone who is dependent on them and living with them such as a child or partner
- receiving Disability Living Allowance or Personal Independence Payments in their own right as well as Employment and Support Allowance or Universal Credit in their own right

To reflect the ongoing rollout of Universal Credit, we made amendments to the wording of one of the defined vulnerable group categories for the 2018 to 2019 academic year. We are continuing to review the descriptions of the defined vulnerable groups to ensure they accurately reflect the purpose of the scheme.

The bursary for vulnerable groups can pay up to £1,200 per year to a student participating on a study programme that lasts for 30 weeks or more. Students on study programmes of less than 30 weeks should be paid a pro-rata amount.

Institutions may decide that although a young person may be eligible for a bursary because they are in one or more of the defined vulnerable groups, they do not have any actual financial need. This might be because their financial needs are already met and/or because they have no relevant costs. Institutions can refuse a student's application on this basis. Similarly, students should only receive the amount they actually need to participate and not automatically receive £1,200 if they do not need the full amount.

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

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 amounting to 13 weeks), which began after the age of 14 and ended after the age of 16

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 bursary for vulnerable groups, where they need financial support to participate.

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 bursary for vulnerable groups.

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 bursary for vulnerable groups, where they need financial support to participate.

Universal Credit

Universal Credit (UC) is being rolled out across the country and will gradually replace Income Support and Employment and Support Allowance as well as other benefits. Institutions will increasingly see students claiming bursaries for defined vulnerable groups based on receiving UC.

UC award notifications do not include any information on the benefits they replace. For this reason, the description of the bursaries for vulnerable group category that relates to receipt of UC or Income Support is that a student must be receiving UC because they are financially supporting themselves and anyone who is dependent on them and living with them such as a child or partner.

We made amendments to the wording of one of the defined vulnerable group categories for the 2018 to 2019 academic year to reflect the ongoing roll out of UC. We are continuing to review the descriptions of the defined vulnerable groups to ensure they accurately reflect the purpose of the scheme.

Bursary funds awarded to a student should not form part of the UC assessment undertaken by the Department for Work and Pensions (DWP). How DWP treat any funding for education depends on whether the student is undertaking advanced full time education. It is unlikely that 16 to 18 year olds will be in advanced full time education as they are generally on study programmes at Level 3 or below.

However, if a student is in advanced full time education, the position is slightly different. Any educational grant or award, such as the bursary fund, would be treated as grant income. However, the UC assessment excludes any grant payment intended to meet the cost of books and equipment or travel expenses incurred because of attending a course.

We do encourage institutions to provide support from the bursary fund by making payments in kind where possible. Institutions must not make bursary fund payments as regular payments for living costs. This is out of scope of the bursary fund and any such payments would be subject to the Social Security Amendment (Students and Income-related Benefits) Regulations 2000.

Evidence of eligibility

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

- 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
- for students in receipt of Income Support or Universal Credit, a copy of their Income Support or Universal Credit award notice. This must clearly state that the claim is in the student's name/confirm they are entitled to the benefits in their own right. The evidence must not state any conditions that prevent them from participating in further education or training. For students in receipt of Universal Credit, institutions must also see a tenancy agreement in the student's name, a child benefit receipt, children's birth certificates, utility bills etc
- for students receiving UC/ESA and Disability Living Allowance and Personal Independence Payments, a copy of their UC claim from DWP (UC claimants should be able to print off details of their award from their online account). Evidence of receipt of Disability Living Allowance or Personal Independence Payment, must also be provided

Institutions must only submit a funding claim to the Student Bursary Support Service (SBSS) for bursaries for vulnerable groups when they have seen and verified appropriate evidence to confirm that the student is eligible, and ensured the student needs financial support to participate.

Pro-rata bursaries for vulnerable groups

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

For example:

- a student is on a 30 week programme. If the institution assesses they have financial needs that require a full £1,200 - if paid weekly, the bursary would be $£1,200 \div 30 = £40$ per week
- if the same student was on a 10 week programme, the pro-rata bursary would be $£40 \times 10$ weeks = £400

Young people eligible for a bursary for vulnerable groups who don't require bursary funding

In some cases, a young person might meet the eligibility criteria for a bursary for vulnerable groups but their financial needs are already met, they have no relevant costs or do not need the maximum award.

For example:

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

In these circumstances, institutions can refuse the student's application. The institution should explain to the student and/or the student's parents the aim of bursary funding and why they are not awarding any bursary.

If a student, or the student's parents, still wants to claim a bursary for vulnerable groups, institutions should consider the particular circumstances in each case. They should assess whether no bursary should be awarded (because the student has no financial needs) or to award a reduced amount (because the financial help needed is limited).

ESFA recommends that institutions should be clear in their bursary fund application form that there is a possibility of no award or a limited award. This ensures all parties understand that meeting the criteria for a bursary for vulnerable groups does not automatically mean funding will be given. Institutions may also wish to review their forms to avoid any terminology that may imply a bursary is guaranteed, including the title of the award.

Eligibility criteria: discretionary bursaries

Institutions make discretionary bursary awards to students to help them overcome the individual barriers to participation they face. This means to help with the cost of travel, to buy essential books, equipment or specialist clothing (such as protective overalls, for example). These are items the student would otherwise need to pay for in order to participate.

The bursary fund is not intended to provide learning support - services that institutions give to students - for example, counselling or mentoring, or to support extra-curricular activities where these are not essential to the students' study programme.

Institutions decide which students receive a discretionary bursary. They set their own eligibility criteria but must comply with the eligibility conditions of the scheme set out in this guide. Institutions must ensure that students are eligible for the discretionary bursary in each year they require support.

All decisions about which students receive a discretionary bursary and how much bursary they receive must be based on each student's individual circumstances and their actual financial need. These will vary from student to student, depending on, for example, their household income, the distance they need to travel to the institution and the requirements of their study programme. Institutions must not make blanket or flat rate payments to all students or to students in particular income bands without considering the actual needs of each student.

Institutions must manage the number and size of discretionary bursary awards to keep within their budget.

Institutions may decide to retain a small emergency fund from their allocation to support students who face exceptional circumstances during the year that impact on their ability to participate. They may also choose to top up the bursary with their own funds to support students who are in need.

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 bursary for vulnerable groups maximum as long as they have clearly identified an individual student requires this level of funding.

Using household income and establishing individual student need

Institutions must ensure their bursary policy ensures funding reaches those students who are most in need of financial support. Institutions should use household income in some way to help establish the amount of support they award to a student. This can be used in conjunction with other factors, such as distance to travel from the institution and the number of dependent children in the household.

It is for institutions to decide the process they use to assess household income, and the specific evidence they request from students/their families. However, DfE is aware that some institutions are unsure about how to use Universal Credit (UC) award notices when these are provided as evidence of household income. DfE suggests institutions may wish to ask for the 3 most recent monthly award statements. The take-home pay figure in addition to the amount of UC after all deductions will give a total monthly income. Using 3 months statements will act as a guide to the household income for a quarter of a year. Institutions could then estimate assumed income for a full year.

An example of a UC award notice is below. The notice shows the 2 highlighted figures – one for take-home pay; one for the amount of UC after deductions – that should be added together to give a monthly total.



The image is a screenshot of a Universal Credit award notice. It contains several sections of text and tables. Two specific figures are highlighted in yellow: one representing 'take-home pay' and another representing 'UC after deductions'. The text around these figures is partially obscured but appears to be part of a summary table or list of items.

Example of a Universal Credit monthly award notice

PDF, 390KB, 1 page

Institutions are encouraged to keep their bursary policies under review to ensure they continue to provide support to students who need it. For example, students not necessarily in receipt of free school meals or benefits but from households where parents are in lower income jobs and may struggle to provide students with all the books and equipment they need or to cover all their travel costs.

Institutions engaged in industry placement delivery are also encouraged to ensure their bursary policies are able to respond to the needs of those students who may incur extra participation costs, for example, to pay for additional travel to their placement.

Publishing bursary fund policies

Institutions must publish a policy or statement setting out how they will use their bursary fund. The document should be available 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 policy document must state that the support available to students is from the 16 to 19 Bursary Fund and institutions must be mindful of this if they develop their own financial support branding, and/or use their own funding to enhance their offer to students.

Institutions must 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.

Bursary fund policies should clearly set out what type of help the institution offers, 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 remember that whilst the discretionary bursary can be used for transport costs, 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.

Managing bursary fund applications

Institutions develop and use their own application forms for the bursary fund.

Institutions delivering standard academic year provision may wish to specify that all applications for the bursary are submitted by a set date so they can assess the overall level of demand holistically and make discretionary awards on a fair basis. Any specific deadline date should be clearly stated in the application form.

However, it is important to bear in mind that a student's circumstance and needs may change later in the year. Consequently, ESFA recommends that there should be no absolute cut-off point 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.

The institution's application process must maintain confidentiality and their application form, promotional materials etc. should emphasise this message, so students don't feel embarrassed about applying.

Application forms, bursary policies and any supporting information must all be clear that students who meet the criteria for bursaries for vulnerable groups are not automatically entitled to a bursary if they do not have financial needs and/or their financial needs are covered from other sources.

It is best practice for students and/or their families to sign a declaration when they apply for help from the bursary to confirm 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 that leads to incorrect/overpayment may result in future payments being stopped and any incorrectly paid funds being recovered. They should also be informed that this might result in a referral to the police with the possibility of the student and/or their family facing prosecution.

What the bursary fund cannot be used for

The bursary fund is not intended to provide learning support - services that institutions give to students - for example, counselling or mentoring, or to support extra-curricular activities where these are not essential to the students' study programme.

Institutions are not permitted to use the 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, or support for travel for all students regardless of family incomes
- block provision of equipment, material or books

- making bonus payments to reward attendance or achievement
- payments to support student's general living costs

Institutions must not use the bursary as a way of incentivising attendance or as a marketing tool to encourage students to choose their institution over another.

Where institutions use non-bursary funds to provide free travel for all their students, they must make clear that this is an offer from the institution, rather than being supported via the bursary fund.

Paying bursary funding to eligible students

ESFA encourages institutions to pay bursaries in-kind rather than cash as far as 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.

Where institutions make in-kind payments to students they should explain to the student the value of the payments and how these have been deducted from their total bursary award.

Where institutions make bursary fund payments to students rather than providing support in-kind, it is good practice to pay the funding 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](#).

Institutions can insist that students only spend the bursary payments they have made to them on the support that has been identified as necessary to help them participate in education. This means they can specify students can only use the funds to pay for travel costs and/or a meal during the day, to buy equipment or any other support that has been agreed.

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 cannot manage their own funds, the institution will need to consider who will manage the bursary on the student's behalf

Where payments are made, it is good practice to make these on a regular basis (weekly, for example) as this helps students 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. However, institutions should take these decisions based on the reasons the bursary was awarded, the student's circumstances and local arrangements.

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

Conditions for receiving bursary funding

Institutions should make payments for the bursary fund - both for the bursary for vulnerable groups and the discretionary bursary - conditional on the student meeting agreed standards of attendance and behaviour.

Institutions must ensure that any standards they set are clear, accessible and understood by students.

Institutions should ensure they obtain and retain evidence that a student has seen and agreed to the conditions. This might be an agreement signed by the student or a signed declaration that forms part of the institution's bursary fund application form.

Institutions can withhold payments if a student does not meet agreed standards, but they should always consider the individual circumstances of the student first. Sanctioning a student to the extent that their bursary funding had been stopped for a whole term, for example, 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.

If an institution purchases books or equipment for a student, they can specify the student must return these at the end of their study programme so they can be used again by another student where appropriate. So, if an institution purchases equipment that is necessary for the student to complete their study programme, they can purchase this with bursary funds and specify the student must return it once they have completed their study programme. If keeping equipment on campus is the best way of ensuring this happens, institutions have the right to set this as a condition.

Institutions' responsibilities in managing complaints or appeals

Any student or parent who is unhappy with how an institution has handled their 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.

ESFA does not have a role in the administration of bursary funding to students because this is the responsibility of individual institutions. As such, ESFA does not usually get involved with complaints. However, ESFA may get involved if there is an allegation that the bursary fund eligibility criteria or any content within this guide is being seriously disregarded.

16 to 19 Bursary Fund and receipt of 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 of other means-tested benefits paid to families, such as Income Support, Jobseeker's Allowance, Child Benefit, Working Tax Credit and Housing Benefit. See also the [Universal Credit](#) section of this document.

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

Institutions must not make bursary fund payments as regular payments for living costs. This is out of scope of the bursary fund and any such payments would be subject to the Social Security Amendment (Students and Income-related Benefits) Regulations 2000.

Funding and allocations: bursary for vulnerable groups

Drawing down funding for vulnerable groups

Institutions should draw down funding for bursaries for vulnerable groups from the Student Bursary Support Service (SBSS) whenever they identify and verify new students who meet the criteria. Institutions can submit as many funding claims as they need to throughout the academic year. Institutions must ensure they have fully verified the student's eligibility and need for a bursary for vulnerable groups before submitting any funding claim.

Institutions should not hold onto claims until the end of the academic year and submit them retrospectively for payment. Submitting funding claims 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 payments for bursaries for vulnerable groups.

Institutions draw the funding down by completing and submitting a bursary for vulnerable groups funding claim via the new SBSS online portal which will be available from 1 September 2019. The deadline for the submission of 2019 to 2020 academic year funding claims is 31 July 2020. The SBSS will not pay any claims submitted after this date.

Guidance on the use of the portal will be provided, but if institutions need any further help, they can contact the SBSS provider helpline on 0300 303 8610. Institutions must retain a copy of the funding claims they submit to SBSS for audit.

How the SBSS processes and pays funding claims

The SBSS carries out checks on the funding claim forms to verify that institutions are eligible to claim and that the form has been correctly completed. The usual processing time for a claim is within 2 weeks.

Once processed, a funding statement will be issued (which can be viewed in the online portal) that confirms the amount that will be paid. Payments will only be made to the institution's bank account as held by ESFA. No other bank account or method of payment is permitted.

Institutions should request a change to their bank account details by completing the [online form](#). Any queries about amending bank account details should be sent to: dfestandingdata@education.gov.uk

A remittance advice will be issued for each successful funding claim. This gives a breakdown by student ID of the individual payments that make up the total. It also includes a payment reference number that institutions will see on their bank accounts to allow easy tracking of payments.

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

Institutions should contact SBSS if they have any queries about funding claims they cannot resolve by using the information in the online portal.

All ESFA funded institutions in receipt of a discretionary bursary allocation in the 2019 to 2020 academic year and institutions delivering 16 to 19 traineeships in the academic year can submit a funding claim for bursaries for vulnerable groups if they have eligible students. Payment will 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 2019 to 2020 academic year may submit a funding claim for bursaries for vulnerable groups if they have eligible students. However, SBSS will need to make further checks with ESFA before funding can be released.

Funding claims for students placed in independent provision

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

The independent education institution must verify that students meet the criteria and are eligible for a bursary for vulnerable groups. Once they are satisfied the student is eligible, they should contact the relevant local authority. The local authority cannot submit a funding claim without formal confirmation of eligibility from the institution. The institution can provide confirmation by sending the local authority a copy of the evidence they have seen or by setting out in writing/by e-mail to the local authority that they have seen evidence to confirm eligibility.

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

Recycling bursaries for vulnerable groups funding

Institutions may accrue some unused funding for bursaries for vulnerable groups during the academic year. For example, if a student leaves early after only receiving part of their bursary or the institution does not pay the full amount 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 for other eligible students until 30 April 2020. For example, rather than claiming £1,200 for a newly identified student who meets the criteria for a bursary for vulnerable groups, the institution may already have £700 that they claimed for a student who has now left. The institution should recycle the £700 for the new student, claiming only £500 from the SBSS to give them the total amount of funding they need.

Institutions can add any funding for bursaries for vulnerable groups they have claimed, but no longer need, for eligible students to their discretionary bursary allocation from 1 May 2020.

Institutions that have incorrectly claimed funding for bursaries for vulnerable groups (for example, they submitted a funding claim without verifying a student met the criteria), should try to recycle the funding on subsequent funding claims. However, if the institution has no other students who are

eligible for a bursary for vulnerable groups, the incorrectly claimed funds cannot be added to their discretionary bursary allocation because they were claimed in error. Instead, institutions must contact ESFA to arrange to return the funds: enquiries.efa@education.gov.uk

Submitting 'zero' funding claims

Where an institution holds enough funds to cover the costs of a bursary for a vulnerable groups eligible student in full, ESFA asks that they submit a funding claim form to the SBSS showing a zero amount.

Similarly, if an institution has decided that a young person is in one or more of the defined vulnerable groups but does not have any actual financial need, it is also helpful if the institution submits a funding claim form showing a zero amount.

This helps give ESFA information on the number of 16 to 19 students in education who are in each of the defined vulnerable groups.

Funding and allocations: discretionary bursaries

Allocations

ESFA makes discretionary bursary allocations to institutions that have a 16 to 19 contract or funding agreement each year.

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 students attending provision delivered by sub-contractors or at different sites are able to apply for the 16 to 19 Bursary Fund. The lead institution is responsible for ensuring the bursary fund is administered appropriately at each site and at any sub-contractor.

ESFA has calculated discretionary bursary allocations 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 applied to institutions 2019 to 2020 allocated student numbers and multiplied by the 2019 to 2020 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

Where an institution had no EMA students in the 2009 to 2010 academic year or where the provision was new in 2011 to 2012 or later, allocations are based on applying the national EMA average figure to the institution's 2019 to 2020 allocated student numbers.

Payments

Discretionary bursary allocations are paid in 2 parts - two-thirds in August; one-third in April. The first payment for academies is September, in line with general academy payment schedules.

Convertor academies

Any school sixth-forms that convert to 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 should pass this bursary funding to the school.

Maintained special schools

Local authorities will also receive discretionary bursary funding to support students at maintained special schools. ESFA bases allocations on the data used to generate High Needs Student (HNS) funding for the 2019 to 2020 academic year. The bursary funding is aggregated and paid as a lump sum to each local authority. The local authority is asked to distribute the bursary funding across all their MSS, according to need.

New institutions

ESFA will make discretionary bursary funding available to institutions that start delivering eligible education and training for ESFA for the first time in the 2019 to 2020 academic year when a contract or funding agreement is generated.

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

Additional bursary funding for T Levels and industry placements

The roll-out of T levels and industry placements is likely to increase the demand for help from the discretionary bursary. Students may need to travel further to access their placement and/or incur additional costs for equipment and clothing. Institutions delivering industry placements have access to the Capacity and Delivery Fund (CDF) which can be used to support additional costs for students where necessary.

Additional discretionary bursary funding is being made available to institutions with CDF funding in the 2019 to 2020 academic year to reduce the risk of institutions having insufficient discretionary bursary funding to support the needs of students. The additional funding is an interim arrangement and institutions should not expect any additional funding in future years.

The additional funding is not ring-fenced for students on industry placement but is part of the institution's overall bursary fund allocation. Institutions must use the funding in line with the rules set out in this guide and not guidance on CDF.

The additional funding has been calculated as follows:

Minimum number of students undertaking a work placement (20% of the vocational students on whom the CDF allocation is based)

x £100 (the discretionary bursary fund unit cost is £298; £100 is the pro rata amount equivalent to one term, reflecting the length of the extended work placement)

x double the uplift of Disadvantage Block 1 = additional funding (or minimum £100; whichever is the higher)

Where institutions' existing discretionary bursary allocation is sufficient to cover the costs of students accessing industry placements, for example the additional funding is not required; they must contact ESFA to return the additional funding.

The Care to Learn scheme (which provides help with childcare costs for young parents in education) pays childcare whilst students are participating in work and industry placements, as long as the placement is a defined part of their study programme. Where help with childcare costs is required, institutions should encourage young parents to apply for Care to Learn (if they have not already done so), including the dates of their placement in their application. Childcare costs must be supported by Care to Learn and not from institutions' discretionary bursary allocations.

Institutions must ensure students eligible for free meals in further education continue to be provided with a meal whilst on their extended work placement.

Administration contribution

Institutions are permitted to use up to 5% of their allocation for administrative costs. Institutions that receive both a 16 to 19 Bursary Fund and free meals in further education allocation are permitted to use up to 5% of the combined allocation for administration.

Institutions must ensure they do not take a sum that is greater than 5% of the single allocation total.

Rules on unspent bursary funds

ESFA permits institutions to carry unspent bursary funds over to the next academic year. Any funds carried forward must continue to be used to support students. They cannot be added to general institution funds.

Where institutions are given a single overall allocation that includes funding for both free meals and the discretionary bursary, they 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.

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

Discretionary bursary and/or free meals funding cannot be carried forward for more than one year. Institutions must inform ESFA of the total amount of any unspent funds (not previously reported) from any year up to and including the 2017 to 2018 academic year by e-mailing enquiries.efa@education.gov.uk. ESFA will recover the unspent funds.

Completing the ILR/School Census

ESFA reminds institutions of the importance of completing 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.

Institutions must also ensure they complete the new ILR or census fields to provide data on the number of students participating in extended work placements.

ESFA operates an in-year growth process for discretionary bursaries based on ILR/census data. This is similar to the in-year growth process for 16 to 19 programme funding and will release additional funding to institutions where data indicates it is needed. This process will factor in delivery of industry placements. Any growth/additional funding is subject to affordability.

Audit, assurance and fraud

16 to 19 Bursary Funds are subject to 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). They must also be able to confirm, during any audit, the amount of any unspent funds that have been carried forward to the current academic year.

Institutions must ensure they can evidence their application process, how the student was assessed, how they made the decision to award the specific amount of bursary and the funds that they have issued to the student. Auditors will be looking for evidence that institutions have applied their bursary fund eligibility criteria correctly and used a consistent application and assessment process for all students. Some institutions use an eligibility checklist to confirm which documents they have seen for each student.

Institutions should retain copies of any documents the student has signed to give formal agreement to their conditions for payment.

Hard or scanned copies of documentation should be retained for 6 years (records can be kept electronically).

Examples of documentation include:

For the bursary for vulnerable groups:

- a copy of the funding claim sent to SBSS
- evidence showing that the student is eligible, for example, a letter from DWP or the local authority or a copy of the student's online Universal Credit statement
- evidence of payments received from the SBSS, for example bank statements and remittance advices
- a copy of the student's individual assessment of actual financial need
- evidence of payments made to the student

For the discretionary bursary:

- evidence used to assess eligibility and determine household income, such as P60's, self-employment accounts, wage slips, a letter from DWP, copies of online statements for Universal Credit.
- 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

ESFA will recover funds where auditors identify funding errors in any circumstances where the institution is not able to demonstrate at audit how their students meet the eligibility criteria of the bursary fund; and in any circumstances where the institution has claimed vulnerable group bursary payments for duplicate students.

Any concerns relating to financial irregularity or impropriety are taken seriously. ESFA will instigate investigations where it assesses 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

Free meals in further education

Institutions that receive allocations for both free meals in further education and the 16 to 19 Bursary Fund discretionary bursary have flexibility to use the funding as a single allocation. Institutions must manage the single allocation appropriately to ensure all students eligible for a free meal receive one (including when they are attending a work placement) 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. ESFA adjusts discretionary allocations to take account of this double funding for those institutions also in receipt of an allocation for free meals.

The free meals in further education guide gives detailed information about eligibility, the allocations methodology and how the adjustment has been calculated.

Where students are eligible for a free meal, 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 discretionary bursary or bursaries for vulnerable groups.

Other useful information

This section provides information on specific groups of students to help inform institution's eligibility decisions.

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.

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 group bursary. These students are not eligible for Scottish EMA.

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 bursary for vulnerable groups. Institutions should consider any support the student is receiving from Wales before making any bursary award.

All students living in England and travelling to Wales to study who meet the criteria for a bursary for vulnerable groups are eligible to apply for one if they have a financial need. They should approach their home local authority in England to make an application.

Good practice

The following section highlights a number of areas of good practice in administering both types of bursary fund.

Raising awareness of the 16 to 19 Bursary Fund

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

- 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
- in another college, as well as information about the 16 to 19 Bursary Fund being in prospectuses and posters, the college also works with local support services to target potential students who are homeless and provide them with information
- 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 etc. Any young person who attends a pre-enrolment interview gets a card with brief information on the bursary and pointers directing them to the full information on the college's website. Information is also provided in enrolment packs and in conversations with tutors. In addition, social workers who work with the most disadvantaged young people help the college to identify those who may be eligible for the bursary for vulnerable groups
- 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

Identifying students eligible for bursaries for vulnerable groups

Institutions can take the initiative to identify students eligible for a bursary for vulnerable groups by working with the local authority, looked after children's education services and care leaver services, to encourage students to apply for a bursary where needed. Institutions and local authorities can also set up local data sharing agreements to share information about which students might be in need. 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:

- 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
- young people who might need support 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 young people likely to be in need before enrolment so they become aware of the bursary early. They are then assisted in completing the application process if appropriate
- one college employs a variety of methods to ensure eligible students are aware of the bursary. This includes promotion 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

Identifying students who may need support from the discretionary bursary

Some institutions have informed the Department for Education that it can be difficult to identify which students may need help from the discretionary bursary if they do not pro-actively ask for support. General further education colleges and sixth form colleges can check the [Key to Success](#) site to find out if new students were in receipt of Pupil Premium funding in year 11 or received SEN support.

This information should not be used to guarantee support or to offer blanket support to students, however it could be a helpful source of information for institutions to use to identify students they could proactively approach to see if financial support is required (subject to the usual assessment of individual need).

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 where they have a financial need.

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.

Working with other organisations

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 could include institutions working together to identify and support eligible students, pool funds and centrally manage and administer the bursary. For example, one 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.

Paying bursary funding to students

Institutions should always 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:

- 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, the college purchases this and the cost is deducted from the student's overall award. In cases where a carer has responsibility for the young person's finances, meetings are set up with them to decide how payments should be made
- in another institution, every student who qualifies for a bursary for vulnerable groups is offered an interview with a financial support advisor to decide together on the best way to deliver his or her support. Priority areas are addressed first; travel to college, equipment costs and support with studies. Additional expenditure such as university visits is also discussed
- one institution pays students a greater amount of funding at the start of their course so they can pay for equipment and course-related items. Travel vouchers are used to pay for bus fares. The Student Services Team meet with the students regularly to help them with budgeting

How to ask a question about the 16 to 19 Bursary Fund

If institutions have a question that is not answered by this guide, please contact ESFA via our [online enquiry form](#).

Institutions with any questions about completion of the bursary for vulnerable groups funding claim or about bursary for vulnerable groups payments made by the SBSS should contact SBSS on 0300 303 8610

Published 15 April 2019

APPENDIX 2



Guidance

16 to 19 funding: free meals in further education funded institutions for 2019 to 2020

Guidance to help provide free meals to disadvantaged 16 to 18 year old students in further education funded institutions.

Published 1 April 2019

From:

[Education and Skills Funding Agency](#)

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Who this guide is for

This guide is departmental advice from Education and Skills Funding Agency (ESFA). This advice is non-statutory, and is intended to help further education (FE) funded institutions understand their obligation to provide free meals to disadvantaged students.

Free meals: a summary

The 1996 Education Act requires maintained school and academy sixth forms to provide free meals to disadvantaged students who are aged over 16. In the 2014 to 2015 academic year this requirement was extended to disadvantaged students following FE courses at the range of FE funded institutions. Funding Agreements place a legal duty on institutions to comply with this requirement.

Institutions must make a free meal available for all eligible students for each day the student attends their study programme, where this is appropriate.

Institutions receive funding at a rate equivalent to £2.41 per student per meal.

Students aged over 19 who are continuing on the same study programme (19+ continuers) they started before they turned 19 or who have an Education Health and Care Plan (EHCP) are eligible for a free meal where they meet the criteria

Where institutions receive funding for both free meals in further education and 16 to 19 Bursary Fund discretionary bursary, they may use the funding as a single allocation.

Transitional protections introduced in the 2018 to 2019 academic year continue to apply. The protection means that all students already receiving free meals on or after 1 April 2018 continue to be eligible to receive free meals whilst Universal Credit continues to roll out. This also applies to students who were eligible for free schools meals (FSM) prior to moving into further education provision.

Eligibility for free meals

Institution eligibility

Students must be enrolled in further education provision funded via ESFA to be eligible for a free meal. Eligible institutions are:

- general further education colleges, including specialist colleges
- sixth-form colleges
- commercial and charitable providers
- higher education institutions (HEIs) with 16 to 19 funding from ESFA
- specialist post-16 institutions (SPIs)
- local authorities (LAs) and FE institutions directly funded for 16 to 19
- 16 to 18 traineeship providers
- European Social Fund (ESF) only institutions
- 16 to 19 only academies and free schools
- 16 to 19 only maintained schools

Student eligibility - Age

A student must be aged 16 or over but under 19 on 31 August 2019 to be eligible to receive a free meal.

Students aged 19 or over are only eligible to receive a free meal if they are continuing on a study programme they began aged 16 to 18 ('19+ continuers') or have an Education, Health and Care Plan (EHCP).

These 2 groups of aged 19 plus students can receive a free meal 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.

The following groups of students are not eligible for free meals in further education:

- students aged between 14 and 16 (these students are already covered by free school meals (FSM) provision)
- students aged 19 or over at the start of their study programme, unless they have an EHCP or are a 19+ continuer
- apprentices, including those with an EHCP

Eligible benefits

Free meals are targeted at disadvantaged students. Free meals in further education defines disadvantage as students being in receipt of, or having parents who are in receipt of, one or more of the following benefits:

- Income Support
- income-based Jobseekers Allowance
- income-related Employment and Support Allowance (ESA)
- support under part VI of the Immigration and Asylum Act 1999
- the guarantee element of State Pension Credit
- Child Tax Credit (provided they are not entitled to Working Tax Credit and have an annual gross income of no more than £16,190, as assessed by Her Majesty's Revenue and Customs (HMRC))
- Working Tax Credit run-on – paid for 4 weeks after someone stops qualifying for Working Tax Credit
- Universal Credit with net earnings not exceeding the equivalent of £7,400 pa

A student is only eligible to receive a free meal when they, or a responsible adult on their behalf, have made a successful application to the institution where they are enrolled.

Feedback from institutions has indicated that there is some confusion about Working Tax Credit and whether children from families in receipt of it are eligible for free meals. Working Tax Credit is not a qualifying benefit for free meals. A parent or student must be in receipt of one of the qualifying benefits set out above to be eligible. Qualifying benefits include the Working Tax Credit run on which is paid for four weeks after you stop qualifying for Working Tax Credit.

From 1 April 2018, any student who is in receipt of, or has parents who are in receipt of, Universal Credit must have a net earned annual income of no more than £7,400 in order to be eligible for free meals.

Students must also satisfy the residency criteria set out in [ESFA Funding regulation guidance](#).

Verification of student eligibility

Institutions are responsible for assessing applications for free meals. All students applying for a free meal for the first time in the 2019 to 2020 academic year must submit an application (either by the student or by a responsible adult on their behalf) to the institution where they are enrolled. Some institutions may use a paper application form; others may operate an on-line application.

Institutions will be aware that the Department for Education (DfE) provides an electronic Eligibility Checking System (ECS) that enables local authorities to check free school meal (FSM) eligibility on behalf of institutions.

It is important that institutions and local authorities understand that the legal gateway (section 110 of the Education Act 2005) that enables the Department to obtain benefit information held by DWP and HMRC for checking eligibility is limited to FSM. Information from the ECS cannot currently be used to check entitlement for free meals for post-16 students.

As part of the application, institutions must ask the student (or their parent/guardian) to provide evidence of the award of the qualifying benefits. This might be an award notice or letter from DWP or HMRC. Institutions may want to consider using a combined application form and process for free meals and the 16 to 19 Bursary Fund.

Universal Credit

For new applicants, institutions must verify the eligibility of students, or their parents, who are in receipt of Universal Credit, by asking for a copy of their Universal Credit award notice that includes their monthly earnings. Institutions will need to assess the information given to obtain an accurate proxy of the individual's current earned annual income.

Institutions should check eligibility using the following three-step process:

- Step 1: the student or their parents provide a Universal Credit award statement from their most recent complete assessment period, showing that their earnings in that period do not exceed £616.67 (this is a twelfth of an equivalent annual income of £7,400). If their earnings do not exceed £616.67, they are eligible for free meals. If their earnings do exceed £616.67, the check must move on to the next step.
- Step 2: the student or their parents provides Universal Credit award statements from their two most recent complete assessment periods, showing that their earnings in that period do not exceed £1,233.34 (this is a sixth of an equivalent annual income

of £7,400). If their earnings do not exceed £1,233.34, they are eligible for free meals. If their earnings do exceed £1,233.34, the check must move on to the next step.

- Step 3: the student or their parents provides Universal Credit award statements from their three most recent complete assessment periods, showing that their earnings in that period do not exceed £1,850.00 (this is a quarter of an equivalent annual income of £7,400). If their earnings do not exceed £1,850.00, they are eligible for free meals. If their earnings do exceed £1,850.00, the student is not eligible for free meals.

A manual check will be required to determine eligibility for those students or their parents who are self-employed and in receipt of Universal Credit. Parents will need to provide evidence that:

- they are in receipt of Universal Credit by providing their Universal Credit award letter
- they are self-employed by providing a copy of their company registration or tax return form
- their monthly net earnings do not exceed the threshold as set out in steps 1, 2 and 3. Institutions should request that self-employed parents complete the self-declaration form and, once satisfied that they are eligible, provide the student with a free meal

Transitional protection arrangements

Eligibility criteria introduced under Universal Credit from 1 April 2018 will result in some households becoming eligible for free meals and others falling outside of the eligibility criteria. DfE has put transitional protection arrangements in place to provide certainty for families and ensure they do not experience a sudden loss of free meals.

The protection arrangements apply as follows:

- all students already receiving free meals at 1 April 2018 will continue to receive free meals whilst Universal Credit is rolled out. This will apply even if their household earnings rise above the new threshold during that time
- any student who becomes eligible for free meals after the threshold has been introduced will also continue to receive free meals during the Universal Credit rollout. This will apply even if they subsequently become ineligible during this period because their household earnings rise above the new threshold

Institutions do not need to carry out any further eligibility checks for these protected families during this period. They may wish to note the students as 'protected' in their free meals auditable records.

Institutions should seek to identify students who are eligible to receive free meals under the transitional protection. For example, by speaking to the student's previous school or their local authority (in the case of FSM) or to their previous further education funded institution (in the case of free meals in further education). The information may also be available on the Common Transfer file where institutions have signed up to the DfE's school-to-school

system, although the Department recognises this may not be appropriate for all further education funded institutions. The Department is also exploring options for providing historical free school meals (FSM) information to help institutions identify students who are protected and should continue to receive a free meal.

Where institutions are unable to verify previous eligibility for free meals using the approaches above, they may wish to consider seeking evidence from the student/their parent, for example, by requesting a copy of previous entitlement letters etc.

A student who has not previously claimed free meals is only eligible to receive one when they, or a responsible adult on their behalf, have made a successful application to the institution where they are enrolled. Once Universal Credit is fully rolled out, any students receiving free meals who no longer meet the eligibility criteria at that point (because they are earning above the threshold) will continue to receive protection until they complete their 16 to 19 funded education. 19+ continuers and students aged 19 and over with EHCPs will continue to receive protection until the end of their current programme of study.

Student who make a first application for in the 2019 to 2020 academic year and who have household earnings above the threshold will not be eligible for free meals.

Allocations and payments

Where possible, ESFA has based 2019 to 2020 academic year free meals funding for further education institutions on their 2017 to 2018 full academic year data and their funded student number for the 2019 to 2020 academic year. ESFA has used the number of students assessed as eligible for, and in receipt of, free meals in the 2017 to 2018 academic year as a percentage of the total number of reported students aged 16 to 19 in that year. This establishes the number of students we might reasonably expect to be eligible for free meals support in the 2019 to 2020 academic year.

If 2017 to 2018 full academic year information is not available, ESFA will use alternative approaches to generate the allocation and explain the calculation to the institution. ESFA strongly advises institutions to make data returns for the number of students assessed as eligible for, and in receipt of, free meals on an ongoing basis.

ESFA apportions the number of fundable free meals students across the funding bands, using the same methodology as for mainstream allocations. Band 5, Band 4 and Band 1 FTEs are full-time students. Band 3 and Band 2 are part-time students. Two funding rates apply, one for full-time students and one for part-time students, equivalent to £2.41 per student per meal.

As in previous years, ESFA has made an adjustment for historic double funding between free meals and the 16 to 19 Bursary Fund. ESFA calculates each institution's share (percentage) of the total number of students supported with free meals who informed the 2019 to 2020 free meals allocations. This percentage is used to calculate the amount to be subtracted from each institution's discretionary bursary allocation.

Further information about the allocations methodology is set out in ESFA funding statements (issued to institutions in February to March 2019).

Payment of allocations

ESFA will pay free meals allocations to institutions in 2 parts: approximately two-thirds in August and one third in April. The first payment for eligible academies is September, reflecting the general academies payment schedule.

If any institution given an allocation of free meals funding determines they do not have eligible students, they should contact ESFA to return their allocation.

Administrative contribution

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

Institutions that receive allocations for both the 16 to 19 Bursary Fund and free meals in further education schemes are permitted to use up to 5% of the combined allocation for administration. Institutions must ensure they do not take a sum that is greater than 5% of the single allocation total.

Rules on unspent free meals funds

ESFA permits institutions to carry unspent free meals funds over to the next academic year. Any funds carried forward must continue to be used to support students. They cannot be added to general institution funds.

Where institutions are given a single overall allocation that includes funding for both free meals and the discretionary bursary, they 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.

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

Free meals and/or discretionary bursary meals funding cannot be carried forward for more than one year. Institutions must inform ESFA of the total amount of any unspent funds (not previously reported) from any year up to and including the 2017 to 2018 academic year by e-mailing enquiries.efa@education.gov.uk. ESFA will recover the unspent funds.

The provision of free meals to students

Institutions must make provision for free meals to eligible students (those who are in receipt of the qualifying benefits and who make a successful application for free meals) for each day the student attends their study programme, where this is appropriate.

For example, if a student attends for 5 days a week, 9am to 3pm, for part of their course, the institution should provide 5 free meals. If a student has 2 days a week when they only attend from 9am to 10am, then the institution does not have to provide meals on those days.

Institutions are responsible for encouraging and supporting students in making healthy food choices. Many caterers will be able to advise on suitable healthy options to offer students. Institutions should also offer hot food options where practical.

Institutions should provide a meal free of charge to eligible students, or fund the free meal via an electronic credit or voucher that can be redeemed on-site or off-site where institutions have arrangements with nearby food outlets. Electronic credits and vouchers must be worth a minimum value of £2.41.

If an institution determines it is necessary to enhance the £2.41 free meals funding rate, in other words, to provide a meal with a greater value, from the single funding allocation or other sources, they have discretion to do so.

Institutions must consider the value for money and reasonableness of an enhancement to the £2.41 rate and must be able to justify this at audit, particularly if they choose to make a significant variation from this amount.

The cost of meals is sometimes included as part of the package of support for High Needs Students that is agreed with local authorities. In these instances, institutions should consider the issue of potential double funding for meals when assessing the need to support. This might be by deducting the appropriate amount of funding from the total costs of the package for those students who will be eligible for a free meal, enabling local authorities to use those funds elsewhere.

The majority of students will require a free meal at lunchtime to fit in with usual study and attendance patterns. However, institutions may exceptionally choose to make provision for a free meal at an alternative time, for example, a breakfast, depending on the study pattern of individual students.

Institutions must make free meals provision for students on days when they are off-site as part of their study programme, for instance attending a work placement, work experience or industry placement. Wherever possible, institutions should provide the student with a voucher they can use at nearby food outlets or arrange with the work experience or placement provider to provide a meal.

ESFA expects that a meal, voucher or credit will be provided to eligible students. However, this may not be practical in some situations and institutions are permitted to make cash payments to students in the following exceptional circumstances:

Students attending institutions that meet all of the following criteria:

- fewer than 50 students in total on roll
- no catering or kitchen facilities on site

- no suitable food outlets locally that will agree to take part in a credit or voucher scheme

Students who are off-site on work placement or work experience as part of their study programme whose host organisation is unable or unwilling to provide a meal and who have no access to a suitable food outlet that will accept a voucher. Examples include work placements in rural areas or on industrial sites.

Institutions with more than 50 students in total on roll but which have sites away from their main campus that a) have no on-site catering facilities and b) are too far away for students to travel back to facilities on the main campus.

If institutions identify particular and exceptional circumstances that fall outside these parameters, they have discretion to make cash payments if they believe that failing to do so will prevent an eligible student from being provided with a meal. Institutions must ensure they record any such decisions as part of their auditable records.

Catering for students with special dietary requirements

Institutions are best placed to make decisions in the case of students who have special dietary requirements, taking into account local circumstances. Institutions are expected to make reasonable adjustments for students with these requirements.

The [School Food Plan's UIFSM toolkit](#) was developed to help schools implement universal free school meals for infant pupils, but it contains advice on how to cater for pupils with special dietary requirements, which may be helpful to institutions.

Free meals and the 16 to 19 Bursary Fund

ESFA removed the ring fence between the free meals in further education allocation and the 16 to 19 Bursary Fund discretionary bursary allocation to give institutions flexibility in using the funding. Institutions must manage the single allocation appropriately to ensure all students eligible for a free meal receive one in line with this 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. ESFA adjusts discretionary allocations to take account of this double funding for those institutions also in receipt of an allocation for free meals.

Institutions have discretion to manage the single allocation as they decide most appropriate to best provide support to eligible students for both schemes. Free meals in further education remains an entitlement and institutions must manage the single allocation appropriately to ensure that all students entitled to a free meal are provided with one.

If an institution determines it is necessary to enhance the £2.41 free meals funding rate and provide a meal with a greater value, whether from their single allocation or other sources, they have the discretion to do so. However, where institutions choose to do this, they must ensure that funding for discretionary bursaries continues to provide sufficient help to

students facing the range of barriers to participation and should not enhance free meals funding to the detriment of other needs.

Institutions can give additional support to students eligible for a free meal from the 16 to 19 Bursary Fund, if the institution assesses they meet the criteria for bursary for vulnerable groups or 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.

Raising awareness of free meals

Institutions are responsible for ensuring students are aware of the eligibility criteria for free meals. They should also encourage students who may meet the criteria to make an application for a free meal.

Institutions should clearly set out their free meal provision for students and parents. This might be by publishing a statement on their website, promoting and providing information about free meals at induction and enrolment days, sending letters home to parents, etc.

Students do better in their studies when they have access to proper, regular, nutritional meals. ESFA encourages institutions to support students to make healthy food choices by raising awareness of relevant information and guidance.

Individualised Learner Record (ILR)

Institutions must complete the free meal field in the ILR to provide information on the number of young people eligible for free meals. This is code FME2.

Institutions must ensure they only record students who are eligible and have taken up the free meal in the free meal field. Students assessed as eligible but who do not take up a meal should not be included.

Students who receive funding for meals from the discretionary 16 to 19 Bursary Fund must not be recorded in the free meals field nor should students who receive Free School Meals (FSM) (for example, 4 to 15 year-olds). FSM students should be reported in the separate FSM field.

The ILR states that code FME2 should be used if the student is eligible for, and has taken up, free meals at any point during the academic year. If the student stops taking free meals FME2 should be retained and not removed until the start of the following academic year. Similarly, if a student becomes ineligible during the year, the transitional protections mean that FME2 should be retained until the student's programme of study ends.

This code should be recorded for eligible students who are ESFA funded students aged 16 or over and under 19, 19 to 24 year-old students who are subject to an EHCP, ESF funded students aged between 16 and 18 and 19+ continuers.

Institutions that do not complete the ILR but instead complete the School Census should complete the 2 free school meals fields.

Audit and assurance

Free meals in further education is subject to normal assurance arrangements for 16 to 19 education and training.

Institutions must maintain accurate and up to date records that evidence which students receive free meals funding; confirm student eligibility for funding, including where transitional protections apply, and demonstrate appropriate use of funds, including the rationale for any enhancement to the £2.41 free meals rate. They must also be able to confirm, during any audit, the amount of any unspent funds that have been carried forward to the current academic year.

Institutions are responsible for deciding what evidence they accept for free meals and how recent it is. However, they must ensure they can evidence that only students who meet the eligibility criteria for free meals in each academic year receive them. Where institutions have used their discretion to make cash payments that are outside the specified criteria set out in this document, they must ensure these are recorded.

Institutions should note that, following an audit, ESFA might recover funding where free meals payments are found to have been made to ineligible students.

Further information

The [Children's Food Trust](#) has produced guidance for schools that may be helpful for free meals in further education. The Free School Meals Matter Toolkit, and A quick guide to free school meals are available on the Trust's website.

Information about healthy eating, including recipes, is available at [Change4Life](#) and [NHS](#).

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APPENDIX 3

APPLICATION FOR 16 – 19 (+19) BURSARY FUND/FREE COLLEGE MEALS 2019-2020

| STUDENT NAME: | YES | NO |
|--|------------|-----------|
| VULNERABLE BURSARY (AGED 16-18 ONLY) | | |
| To be eligible for the vulnerable bursary you must be aged between 16 – 18 on 31 August and meet one of the four criteria below: | | |
| <ul style="list-style-type: none"> • In care | | |
| <ul style="list-style-type: none"> • Care leaver | | |
| <ul style="list-style-type: none"> • In receipt of Income Support or Universal Credit in your own right | | |
| <ul style="list-style-type: none"> • In receipt of Disability Living Allowance or Personal Independence Payments and either Employment & Support Allowance or Universal Credit in your own right. | | |
| | | |
| DISCRETIONARY BURSARY | | |
| To be eligible for the discretionary bursary you must be aged between 16 – 18 on 31 August, or be aged over 19 and have an Education, Health & Care Plan. Your household income should be less than £21,000. | | |
| Please note: You must provide documentary evidence to prove your eligibility for either bursary (evidence must be no more than six months old). The type of evidence required may be a P60, wage slips or evidence of any of the benefits listed in the free college meals section. | | |
| Please indicate what type of support you require eg. transport, meals, college trips, books, sports kit, and include costs where known. | | |
| | | |
| BANK ACCOUNT DETAILS | | |
| Full name of account holder | | |
| Name of Bank/Building Society | | |
| Account Number | | |
| Sort Code | | |

| FREE COLLEGE MEALS | | YES | NO |
|--|--|------------|-----------|
| To be eligible to receive a free college meal you must be aged between 16 – 18 on 31 August or over 19 and have an Education, Health & Care Plan. You or your parents must also be in receipt of one or more of the following benefits and must provide documentary evidence (which is no more than six months old): | | | |
| <ul style="list-style-type: none"> • Income-related Employment and Support Allowance (ESA) | | | |
| <ul style="list-style-type: none"> • Income-based Job Seekers Allowance (JSA) | | | |
| <ul style="list-style-type: none"> • Child Tax Credit (CTC) (provided you are not entitled to Working Tax Credit) and have an annual gross income of no more than £16190 | | | |
| <ul style="list-style-type: none"> • Income Support (IS) | | | |
| <ul style="list-style-type: none"> • Universal Credit (UC) with net earnings not exceeding the equivalent of £7400 per year | | | |
| <ul style="list-style-type: none"> • Support under part VI of the Immigration and Asylum Act 1999 | | | |
| <ul style="list-style-type: none"> • The guarantee element of State Pension Credit | | | |
| In order to receive a free meal we have to notify our external catering provider that you are eligible. Please indicate that you are happy for us to do this. | | | |
| Please note: Please note that all evidence you provide is stored securely and in compliance with General Data Protection Regulations; we do not keep a copy of the evidence you provide for either bursary or free college meals. Once we have processed your application and established eligibility all evidence is disposed of confidentially. | | | |
| <p>Declaration: The information I have given on this form is accurate and I will inform you immediately of any changes in my/my family's personal circumstances. I understand that if I provide false information I will have to repay my award. I will also have to repay my award if I leave the college.</p> <p>I understand that monies I receive from the Bursary Fund will be paid on condition that my attendance does not fall below 85% (except in exceptional circumstances); also that my behaviour meets the required standards expected from all Hereward students.</p> <p>I understand I have the right to appeal if I disagree with the outcome of my Bursary application. This appeal should be made in writing to the college.</p> | | | |
| Both student and parent/carer must sign this form unless the claim is being made in the student's own right & the amount claimed is paid directly to the student. | | | |
| Student Signature | | Date: | |
| Parent/carer Signature: | | Date | |

Initial Equality Impact Assessment Screening

| | | |
|--|--|----------------------------|
| Name of policy or service | Administration of Bursaries and the Learner Support Fund | |
| Author of impact assessment (name and job title) | Valerie McKeever, Admissions Manager | |
| Date impact assessment completed | June 2018 | |
| Is this a new or reviewed policy or service? | New policy/service <input type="checkbox"/> Date of policy/service Reviewed policy/service <input checked="" type="checkbox"/> Date of review June 2018 | |
| Briefly describe the aims and purpose of the policy | To denote the process taken when administering the learner Learner Support Funds. | |
| Who is intended to benefit from this policy and in what way? | All learners within the college | |
| What could contribute or detract from achieving the aims and purpose of the policy? | None | |
| What evidence or data has been collected and used to determine the impact on equality groups. Have any data gaps been identified. | Full tracking of learner support fund allocations | |
| | | Comments / Evidence |
| Has consultation on this policy indicated any possible concerns or issues in relation to equality, diversity and inclusion? | Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> | |
| Is there an opportunity to promote equality of opportunity by this policy? | Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> | Vulnerable learners |
| Potential impact on grounds of: | | |
| Race | Positive <input type="checkbox"/> Negative <input type="checkbox"/> No impact <input checked="" type="checkbox"/> | |

| | | |
|--|---|--|
| Disability | Positive <input type="checkbox"/> Negative <input type="checkbox"/> No impact <input checked="" type="checkbox"/> | |
| Gender | Positive <input type="checkbox"/> Negative <input type="checkbox"/> No impact <input checked="" type="checkbox"/> | |
| Gender reassignment/identity | Positive <input type="checkbox"/> Negative <input type="checkbox"/> No impact <input checked="" type="checkbox"/> | |
| Age | Positive <input type="checkbox"/> Negative <input type="checkbox"/> No impact <input checked="" type="checkbox"/> | |
| Sexual orientation | Positive <input type="checkbox"/> Negative <input type="checkbox"/> No impact <input checked="" type="checkbox"/> | |
| Religion or belief | Positive <input type="checkbox"/> Negative <input type="checkbox"/> No impact <input checked="" type="checkbox"/> | |
| Marriage and civil partnerships | Positive <input type="checkbox"/> Negative <input type="checkbox"/> No impact <input checked="" type="checkbox"/> | |
| Pregnancy and maternity | Positive <input type="checkbox"/> Negative <input type="checkbox"/> No impact <input checked="" type="checkbox"/> | |

If any potential negative impacts of this policy or service have been identified, then a full equality impact assessment form should be completed.

