



Education  
Funding  
Agency

# **16-18 Residential Bursary Funding Guide for 2012/13**

**May 2012**

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## Introduction

1. This guide provides information to all learning providers receiving 16-18 Residential Bursary Fund (RBF) allocations in 2012/13. It sets out the requirements for the administration of the funding and describes how the Education Funding Agency (EFA) – the successor body to the Young People’s Learning Agency (YPLA) from 1 April 2012 – will collect monitoring information for the scheme.
2. Following an internal review of residential support arrangements in 2011, the Department for Education (DfE) has decided not to make any changes to the Residential Bursary Fund and the Residential Support Scheme (RSS) in 2012/13 for young people aged 16-18.
3. Distinct RBF and RSS schemes for young people will be retained for 2012/13, but DfE will continue to review arrangements for future years, considering how existing arrangements might be replaced by a simpler means of providing residential support.
4. Residential support for those learners starting aged 19 plus will remain the responsibility of the Department for Business, Innovation & Skills. Learners will be able to apply for funding through their college from the new Residential Access Fund. This fund has been created through the merger of the (19+) Residential Support Scheme and the Discretionary (19+) Residential Bursary Fund budgets.

## Residential Bursary Funding in 2012/13

5. RBF is intended to provide financial help towards the costs of accommodation for young people attending one of the designated providers of specialist provision, where that provision requires the young person to be resident in order to participate because it is not available locally and/or because it requires learners to be available at unsociable hours on a regular basis.
6. RBF should be used to help young people with the costs of accommodation whilst they are learning; the accommodation may be owned or managed by the learning provider or be owned by a private landlord. It is anticipated that the majority of RBF funding will be used to cover accommodation costs. However, RBF may also be used to help with travel costs between the young person’s lodgings and the provider where appropriate.
7. Learners who are aged 19 or over and who require assistance with residential costs associated with their learning should apply to their provider for funding from the Residential Access Fund. Any queries about learners aged 19 and over should be directed to the Skills Funding Agency (e-mail: [learnersupport@skillsfundingagency.bis.gov.uk](mailto:learnersupport@skillsfundingagency.bis.gov.uk))

## Residential Bursary Funding and the 16-19 Bursary Fund

8. Young people who are receiving support from the 16-19 Bursary Fund may also receive support from RBF.
9. RBF should not be used to fund the costs of meals, books and equipment or other course costs. These costs should be funded from the 16-19 Bursary Fund.

**10. Providers are not permitted to vire funds between the RBF and the 16-19 Bursary Fund. No virement of funds is permitted between RBF and adult discretionary learner support funds.**

## Learner eligibility

11. To be eligible for RBF, a young person must be aged under 19 on 27 August in the academic year in which they start their programme of study. Where a young person turns 19 during their course, they can continue to be supported to the end of the academic year in which they turn 19 or to the end of their course, whichever is sooner. RBF should only be paid to young people who have reached the statutory school leaving age.

12. The young person must also satisfy the residency criteria set out in the EFA Funding Guidance for 2012/13. This document is due to be published in June 2012 and will set out the evidence that is required to confirm eligibility.

## Allocations to providers

13. Allocations will be made to providers to manage at their own discretion but in line with this guide. As arrangements for residential support beyond 2012/13 remain under review, the EFA has made 2012/13 allocations to providers at the same level as their 2011/12 allocations.

14. Allocations for RBF can only be spent on learners aged 16 to 19. The money cannot be used to support adult learners (those aged 19 or over at the start of the academic year); for whom there is separate funding allocated by the Skills Funding Agency.

15. Providers who are made an allocation for RBF are responsible for:

- Staying within budget (although they may choose to top-up the RBF budget from their own sources)
- Paying out funds to contribute to the residential costs for young people who meet the criteria for support
- Reporting any anticipated underspend to the EFA
- Completing the Individualised Learner Record (ILR) to report learners receiving residential support (and inform future allocations) and providing minimal additional Management Information to the EFA on an annual basis on learner numbers and expenditure.

16. Providers may use up to 5% of their RBF allocation to cover administrative costs.

17. Where providers identify that they will be unable to spend the majority of their RBF allocation, they should notify the EFA as soon as possible to arrange to repay the excess.

18. The EFA will aim to distribute any returned funds to other providers that can make use of further funding. The EFA may also recover funds from providers which are undistributed at the end of the academic year.

19. The EFA cannot guarantee to reimburse overspends by providers. Providers are therefore advised not to overspend in the expectation that there will be a reallocation of funds later in the year as this may not be the case.

## Assessment and payment of RBF

20. Providers have the discretion – in line with this guide - to determine which young people receive RBF support and how much support they should receive. Providers should manage the number and size of RBF awards to keep within their budget, targeting residential support towards those facing the most significant financial barriers to participation.

21. Providers should assess the young person's actual need for help with residential costs before determining whether to award RBF support. Providers may decide to take account of the young person's household income as evidenced by receipt of benefit and/or P60, Tax Credit Award Notice or evidence of self employment income.

22. RBF payments should be made directly to the young person's landlord (whether that be the provider itself if they provide accommodation directly or to a private landlord) for the costs of accommodation and not to the young person themselves for living costs (which would be subject to the Social Security Amendment (Students and Income-related Benefits Regulations 2000)). Receipt of other benefits and/or financial support does not exclude a young person from receiving help with residential support if he/she is experiencing financial difficulties in meeting the costs associated with learning.

23. In making decisions about the number and size of RBF awards, providers should consider that a student's financial circumstances may change during a programme of study, potentially leading them to drop out of learning. Retaining some funds to meet needs which emerge later in the academic year may help providers to react to such circumstances. Providers may also wish to consider taking account of any improvements in a young person's financial circumstances during their programme of study.

24. Although the EFA expects that the majority of RBF awards will be made to cover the costs of accommodation, RBF may also be used to help young people to pay transport costs between their accommodation (if it is not on site) and the provider. Providers are allowed to use no more than 15% of their 2012/13 allocation, or £25,000, whichever is the greater, to support young people's travel costs where they are able to travel daily. Funding daily travel costs using RBF must only be considered as a last resort. The use of RBF to help meet transport costs does not replace the statutory duty on local authorities to set out (in an annually published transport statement) the arrangements they will make to facilitate the participation in education or training of young people of sixth form age.

25. RBF should not be used by a provider for any purpose designed to give them a competitive advantage over other providers; nor should RBF be used for:

- Enrolment or administration fees
- Fees for access to college facilities
- Block subsidy of transport

26. In determining arrangements for payment of RBF, providers are subject to equalities legislation, which means they must not discriminate against their students on the basis of their protected characteristics. They are also subject to the public sector equality duty in section 149(1) of the Equality Act 2010.

## Governance and Monitoring

27. The administration and allocation of RBF will be subject to the provider's normal governance and audit regimes. Providers should also refer to the EFA Funding Guidance for 2012/13, due to be published in June 2012, which will set out the evidence that is required to confirm learner eligibility. If a young person is unhappy about the way in which their request for residential support was handled they should follow the provider's normal complaints procedure.

28. Providers should have administrative procedures that record RBF awards and the number of learners supported (the number, value, purpose etc.). Providers should complete the Individualised Learner Record (ILR) to indicate the numbers of individuals receiving residential support. The EFA will use this information in developing future allocations.

29. The EFA will also request minimal Management Information (MI) to support its monitoring of RBF and to inform future year's allocations. The information which is required for 2012/13 is as follows:

### **Accommodation:**

- providers to supply the number of awards made and the number of learners supported (where the two figures are different)
- providers to state the total amount spent

### **Daily travel (where the young person's lodgings are not on site):**

- providers to supply the number of awards made and the number of learners supported (where the two figure are different)
- providers to state the total amount spent

### **Other costs:**

- providers to supply the number of awards made and the number of learners supported (where the two figures are different)
- providers to state the total amount spent
- providers to supply a description of 'other costs' and an explanation for the expenditure

### **Admin costs:**

- providers should state how much of their allocation (up to 5%) has been spent on administrative costs.

30. This MI will be collected through the EFAs IM Portal during October 2013. The IM Portal is used across the EFA and is our main route of secure communication with providers. The EFA will issue more details and a reminder to providers in advance of the MI return being due.

31. **Providers should note that the EFA will also be requesting this data for their 2011/12 RBF allocation.** The arrangements for collecting this data – which will be due in October 2012 – will be communicated separately.

## Further Information

32. Further information about RBF in 2012/13 will be made available on the DfE website: [www.education.gov.uk](http://www.education.gov.uk) (for providers) and the direct.gov website: [www.direct.gov.uk/studyingaway](http://www.direct.gov.uk/studyingaway) (for learners).

33. Providers should direct any queries about the allocation and administration of RBF to [residentialsupport.EFA@education.gsi.gov.uk](mailto:residentialsupport.EFA@education.gsi.gov.uk)



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