

2015-16 Guidance for Completion of Bursary Tables and FE Discretionary Fund & Childcare Fund (FE and HE) Tables

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Summary: This guidance document describes the Scottish Funding Council's 2015-16 aggregated student support return.

FAO: Principals and directors of Scotland's colleges

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Contents

| | |
|---|---|
| 2015-16 Guidance for Completion of Bursary Tables and FE Discretionary Fund & Childcare Fund (FE and HE) Tables | 2 |
| Revisions to the Bursary Data Collection 2015-16..... | 2 |
| Bursary Tables..... | 2 |
| Table 1A – Bursary Student Numbers and Expenditure..... | 3 |
| (1) Maintenance Allowances | 3 |
| (2) Residence Costs | 4 |
| (3) Dependants Allowance..... | 4 |
| (4) Study Expenses Allowances..... | 4 |
| (5) Travel Expenses Allowances..... | 5 |
| (6) Alternative Travel Expenses Allowances | 5 |
| (7) Additional Support Needs | 5 |
| (8) Total Bursary Numbers and Expenditure | 5 |
| (9) Bursary Funds Spent in Accordance with the 2015-16 Childcare Fund Guidance | 5 |
| Table 1B – Bursary Student Numbers | 6 |
| 34. (1) Mode of attendance:..... | 6 |
| 35. (2) Type of learning:..... | 6 |
| 36. (3) Gender: | 6 |
| Table 2 – Discretionary Fund and Childcare Fund Expenditure | 6 |
| Further information | 6 |
| Annex A - FE Student Rates 2015-16 | 7 |
| Annex B - Bursary return and audit certificate..... | 8 |

2015-16 Guidance for Completion of Bursary Tables and FE Discretionary Fund & Childcare Fund (FE and HE) Tables

Revisions to the Bursary Data Collection 2015-16

1. Student rates have changed.
2. Additional requirement to record student's EMA mode of attendance expenditure in Annex B – Bursary return & audit Certificate.

Bursary Tables

3. Please note that unless otherwise stated all return information should be split according to the category of allowance.
4. All references to 'students receiving' or 'payments received' means all students who received payments and total payments made within the academic year.
5. If a student receives a payment from more than one allowance category during the academic year, then the student should be counted within each of the allowance categories. For example, a student in receipt of financial assistance for Maintenance and Travel Expenses would be counted once in Maintenance and once in Travel Expenses.
6. Students in receipt of ESF should be included in the return.
7. These notes provide guidance for the attached tables only. They are best read in conjunction with the:
 - National Policy for Further Education Bursaries 2015-16 and the Student Support Audit Guidance.
 - For FE and HE Childcare: SAAS and SFC's Further and Higher Education Discretionary Childcare Funds Guidance 2015-16.
 - For FE Discretionary: 2015-16: National Policy: Further Education Discretionary Fund.
8. Please complete the tables electronically and email as an attachment to: mmcneill@sfc.ac.uk Contacts should manually complete the contact details.

9. You should also post a signed, hard copy of the aggregate return to:

Michelle McNeill
Scottish Funding Council
Apex 2
97 Haymarket Terrace
Edinburgh EH12 5HD

10. The values you enter for expenditure should be the exact figure and not rounded to the nearest thousand '000.
11. Checks are in place within the pro-forma to alert whenever the expected maximum expenditure has been exceeded. Should this have been exceeded, please include your reasons when submitting the final return.
12. Data is to be returned no later than 14 October 2016.

Table 1A – Bursary Student Numbers and Expenditure

13. These numbers should include all students who had a bursary payment within the academic year. Below are instructions for completing each part of Table 1A.

(1) Maintenance Allowances

14. This is the total number of students receiving a maintenance allowance. This should be split between those receiving 'Maintenance Allowance - at parental home,' and those receiving 'Maintenance Allowance - away from parental home'.
15. The section on students aged under 18 at the parental home is blanked out as such students should be in receipt of EMA which forms the equivalent to an 'at parental home maintenance allowance.'
16. Students receiving a 'self-supporting students' allowance should also only be recorded as 'away from parental home'.
17. Students who are receiving an EMA 'away from home' allowance from bursaries should also be recorded here. This is not all EMA students and students eligible for an EMA are not eligible to receive a 'Maintenance Allowance - at parental home,' allowance from the bursary funds.
18. It is now a requirement to record the student's EMA mode of attendance expenditure. Please record in the appropriate full-time or part-time column.

19. If a student received an 'at parental home' allowance but does not live at the parental home, they should be counted in the category of the allowance received and not their living circumstances.
20. **Expenditure:** This should be the total value of support paid within the academic year to the students recorded under Student Numbers.
21. Please note the 'at parental home,' allowance is **£74.79** per week for Category B (parentally supported students) and the 'away from parental home,' allowance is **£35.57** per week for Category A students, **£94.52** per week for Category B students and **£93.03** per week for Category C students.

(2) Residence Costs

22. These students should not be recorded in (1) but recorded separately in (2).
23. This should include the total number of students who were given an allowance to stay in college approved accommodation as well as any students who were also given a personal allowance.
24. **Expenditure:** This should be the total value of support paid within the academic year to the students recorded under Student numbers. Colleges are asked to show separately the monies used for:
 - Approved accommodation or lodgings (should not exceed **£111.74** per week for all categories of student).
 - Monies paid to the student for their personal allowances should not exceed **£29.27** per week for all categories of students. 'Students under 18' should not receive a personal allowance if they receive the above.

(3) Dependants Allowance

25. This is the number of students (and expenditure) who received an allowance for an adult dependant. This should be the number of students and not the number of dependants and expenditure should not exceed **£53.88** per week. See page 30 of the bursary policy.

(4) Study Expenses Allowances

26. This is the number of students (and expenditure) receiving a study allowance within the academic year. Students receiving a higher study allowance as a direct result of a disability or special educational need should not be included. See page 11 of the bursary policy.

(5) Travel Expenses Allowances

27. This is the number of students (and expenditure) receiving a travel allowance within the academic year. Students receiving a higher travel allowance as a direct result of a disability or special educational need should not be included. See page 12 of the bursary policy.

(6) Alternative Travel Expenses Allowances

28. This is where the college has received approval from SFC to provide an alternative to the travel expenses allowance and can include the cost of running buses or entering partnership agreements with local transport operators. Colleges should enter the number of students (and expenditure) who benefit from the arrangement that would, ordinarily, have been offered a travel allowance. See page 13 of the bursary policy.

(7) Additional Support Needs

29. This is the number of students (and expenditure) who have received an increased travel or study allowance as a direct result of a disability or special educational need. See page 14 of the bursary policy.

(8) Total Bursary Numbers and Expenditure

30. This is the total number of students (headcount) receiving a support package within the academic year for each category. Regardless of how many items a student has received funding for they would be counted just once here while the total expenditure is the auto-calculated sum of the expenditure in (1) to (7) for each category.
31. **Total Bursary Funds Spent 2015-16:** This is the auto-calculated total expenditure under each category.

(9) Bursary Funds Spent in Accordance with the 2015-16 Childcare Fund Guidance

32. Colleges can spend some of their bursary allocation on part of their childcare allocation. This cannot exceed 50% of their childcare allocation. This section is designed to trace what bursary funds were actually used. Record only the actual bursary funds that were spent.
33. Please also ensure you include these funds in the 'total expenditure on students assisted,' section in Table 2 (2) of the form.

Table 1B – Bursary Student Numbers

34. **(1) Mode of attendance:** This is the total number of full and part-time students supported during the academic year. The total number of full and part-time students should equal the total number of male and female students in Table 1B (3).
35. **(2) Type of learning:** This is the total number of open learning students receiving support from the bursary funds. Please note, students recorded here should also be counted in (8).
36. **(3) Gender:** This is the total number of male and female students supported during the academic year. The total number of male and female students should equal the total number of students recorded in (8).

Table 2 – Discretionary Fund and Childcare Fund Expenditure

37. This is the total number of students (and expenditure) who received a Discretionary Fund and/or a Childcare Fund broken down by level (1).
38. Total numbers of students (and expenditure) who received a Childcare Fund is to be further broken down by level, mode of study and Element for Childcare (2). This produces the auto-calculated total in the 'Total Expenditure of Students Assisted,' table for Childcare Fund (1) which is why these cells are locked.
39. Childcare and Discretionary funds that have been spent on bursary should not be included here.
40. Colleges should also state monies used for additional childcare expenditure at FE and HE level (which requires an explanation of the expenditure).

Further information

41. For further information, guidelines, definitions and collection of Bursary, contact: Michelle McNeill Policy / Analyst Officer, tel: 0131 313 6662, email: <mailto:mmcneill@sfc.ac.uk>.

Annex A - FE Student Rates 2015-16

| | |
|---|----------------------|
| Maintenance allowance | |
| | |
| <i>Self –supporting students</i> | £94.52 per week |
| | |
| <i>Parentally supported students</i> | |
| Away from parental home | £94.52 per week |
| At parental home | £74.79 per week |
| | |
| <i>Students under 18</i> | |
| Away from parental home | £37.57 per week |
| | |
| Dependants allowance | £53.88 per week |
| | |
| Accommodation | £111.74 per week |
| | |
| Personal allowance | £29.27 per week |
| | |
| Mileage | 18.37 pence per mile |
| | |
| Unearned income disregard per week, over the period of support | £20.52 per week |

Annex B - Bursary return and audit certificate

College name: College Contact: _____
 College number: Phone Number: _____

| Table 1A - BURSARY STUDENT NUMBERS & EXPENDITURE | | | | 01-Aug-15 to 31-Jul-16 | | | | Value of Support | | | | | | |
|--|-------------------------------------|----------|-------------|------------------------|----------|-------------|-----------------|------------------|-------------|--------------------|----------|--------------------|----------|-------------|
| This relates to students supported in accordance with the National Policy for Further Education Bursaries 2015-16 | | | | | | | | | | | | | | |
| Items Funded | Students under 18 | | | Parentally Supported | | | Self Supporting | | | EMA Student | | | | |
| | Students | (£) | £ / Student | Students | (£) | £ / Student | Students | (£) | £ / Student | Students Full-time | (£) | Students Part-time | (£) | £ / Student |
| (1) Maintenance Allowances: | At Parental Home | | | 0 | 0 | 0.00 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0.00 |
| | Away From Parental Home | | | 0 | 0 | 0.00 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0.00 |
| (2) Residence Costs: | Approved accommodation or lodgings: | | | 0 | 0 | 0.00 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0.00 |
| | Personal Allowance | | | 0 | 0 | 0.00 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0.00 |
| (3) Dependants Allowances: | 0 | 0 | 0.00 | 0 | 0 | 0.00 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0.00 |
| (4) Study Expenses Allowances: | 0 | 0 | 0.00 | 0 | 0 | 0.00 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0.00 |
| (5) Travel Expenses Allowances: | 0 | 0 | 0.00 | 0 | 0 | 0.00 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0.00 |
| (6) Alternative Travel Expenses Allowances: | 0 | 0 | 0.00 | 0 | 0 | 0.00 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0.00 |
| (7) Additional Support Needs Allowances: | 0 | 0 | 0.00 | 0 | 0 | 0.00 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0.00 |
| (8) Total Bursary Numbers & Expenditure | 0 | 0 | 0.00 | 0 | 0 | 0.00 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0.00 |
| Total Bursary Funds spent 2015-16 (This figure should inc. Childcare and Discr. used for Bursary funds): | £0 | | | | | | | | | | | | | |
| (9) Bursary Funds spent in accordance with the 2013-14 Childcare Fund guidance: | £0 | | | | | | | | | | | | | |

ESF students to be included in all tables

| Table 1B - Bursary Student Numbers | | | | | |
|------------------------------------|-------------------------------------|-------|-------|-------|-----|
| | | Cat A | Cat B | Cat C | EMA |
| (1) Mode of attendance: | Full time | 0 | 0 | 0 | 0 |
| | Part-time (including Open Learning) | 0 | 0 | 0 | 0 |
| (2) Type of learning: | Open Learning | 0 | 0 | 0 | 0 |
| (3) Gender: | Male | 0 | 0 | 0 | 0 |
| | Female | 0 | 0 | 0 | 0 |

| TABLE 2 - Discretionary Fund & Childcare Fund Expenditure | | | | | | | | | | | | |
|---|--------------------|-----|-------------|----------------|-----|-------------|-------------|-----|-------------|--|------|-------------|
| This relates to students supported in accordance with the Further and Higher Education Discretionary Childcare Funds Guidance 2015-16, the 2015-16 National Policy: Further Education Discretionary Fund and the HE Undergraduate and Postgraduate Discretionary Guidance 2015-16 | | | | | | | | | | | | |
| Please enter exact amounts for each cell | | | | | | | | | | | | |
| (a) Include students who are asylum seekers and were assisted by FEDF and HEDF | | | | | | | | | | | | |
| (b) Include expenditure on childcare from bursary funds (from row 9 above) in the figures below | | | | | | | | | | | | |
| (c) DO NOT include Childcare and Discr. Funds that have been spent on Bursary in this section | | | | | | | | | | | | |
| (1) Total Expenditure of students assisted: | Discretionary Fund | | | Childcare Fund | | | Total | | | Additional Childcare Expenditure not included in the Childcare cells opposite - Please include an explanation of the expenditure | | |
| | Students | (£) | £ / Student | Students | (£) | £ / Student | Students | (£) | £ / Student | | | |
| | At FE Level | 0 | 0 | 0.00 | 0 | 0 | 0.00 | 0 | 0 | | 0.00 | £0 |
| At HE Level | 0 | 0 | 0.00 | 0 | 0 | 0.00 | 0 | 0 | 0.00 | £0 | | |
| (2) Childcare elements: | Part-Time | | | | | | Full-Time | | | | | |
| Student Category | At FE Level | | | At HE Level | | | At FE Level | | | At HE Level | | |
| | Students | (£) | £ / Student | Students | (£) | £ / Student | Students | (£) | £ / Student | Students | (£) | £ / Student |
| Lone Parents Childcare Grant | 0 | 0 | 0.00 | 0 | 0 | 0.00 | 0 | 0 | 0.00 | 0 | 0 | 0.00 |
| Discretionary Childcare Funds | 0 | 0 | 0.00 | 0 | 0 | 0.00 | 0 | 0 | 0.00 | 0 | 0 | 0.00 |

AUDITORS' REPORT

We have examined the books and records of the above college and have obtained such explanations and carried out such tests as we considered necessary. On the basis of our examination and of the explanations given to us, we report that the information set out in these forms is in agreement with the underlying records. We also report that, in our opinion, the college used these funds in accordance with the Scottish Funding Council conditions. We are satisfied that the systems and controls of the administration and disbursement of these funds are adequate. *Delete if not applicable.

PLEASE RETURN AN ELECTRONIC AND SIGNED PAPER COPY OF THIS FORM

PRINCIPAL'S SIGNATURE: _____

AUDITORS' NAME (IN PRINTED CAPITALS): _____

AUDITORS' SIGNATURE: _____

DATE OF SIGNATURE: _____