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Guidance

16 to 19 Bursary Fund guide: 2018 to 2019 academic year

Guidance for all institutions administering the 16 to 19 Bursary Fund in the 2018 to 2019 academic year.

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Who this guide is for

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

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

16 to 19 Bursary Fund: a summary

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

There are 2 types of 16 to 19 bursaries:

- 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

Changes for 2018 to 2019

To reflect the ongoing rollout of Universal Credit, we have made an amendment to the wording of one of the bursary for vulnerable group categories. This category is now defined as a student who is receiving Income Support or Universal Credit because they are financially supporting themselves and anyone who is dependent on them and living with them, such as a child or a partner.

The vulnerable group category that refers to a student being in receipt of Disability Living Allowance or Personal Independence Payments plus Employment and Support Allowance or Universal Credit has been re-worded slightly to aide clarity, reflecting feedback from stakeholders.

The section in this guide about [using household income and establishing individual student](#) contains some information institutions may find helpful where students/families provide Universal Credit award notices as evidence of household income for the discretionary bursary.

ESFA is making additional bursary funding available to institutions delivering extended work placements in the 2018 to 2019 academic year to ensure that institutions do not need to use a disproportionate amount of their Capacity and Delivery Fund for student support to the detriment of capacity building. This one-off funding is designed to ensure institutions have sufficient bursary funds available to meet potential increased demand for help from any students who may need to travel further to access their placement and/or incur additional costs for equipment and clothing.

The [good practice section](#) of this guide now includes a link to the [Key to Success](#) website. The website

enables institutions to check to find out if new students were in receipt of Pupil Premium funding in year 11 or received SEN support. This may help institutions to identify which students may need help from the discretionary bursary if they do not pro-actively ask for support.

Finally, ESFA wishes to remind institutions about the importance of assessing the needs of individual students when awarding bursary funding. Institutions must not make flat rate payments to all students to whom they award bursary funding or make flat rate payments to students in particular income bands without considering their individual needs. The bursary fund is designed to help students overcome the specific financial barriers they face, not to provide set amounts of funding irrespective of actual need. The [discretionary bursary section](#) of this guide has been split into different parts to make this clearer.

Eligibility criteria

Age

To be eligible to receive a bursary in the 2018 to 2019 academic year a student must be aged 16 or over but under 19 at 31 August 2018.

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

Students aged 19 or over are not eligible for 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

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

- funded directly by ESFA or by ESFA via a local authority
- funded or co-financed by the European Social Fund
- otherwise publicly funded and lead to a qualification (up to and including level 3) accredited by Ofqual or is pursuant to Section 96 of the Learning and Skills Act 2000
- a 16 to 19 traineeship programme

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 because they do not have the kinds of costs the bursary fund is intended to cover (for example, transport, equipment and uniforms). In the rare instances where an institution identifies that such a student does require financial help, support should be provided in-kind help rather than by cash payments. For example, 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 in the 2018 to 2019 academic year. This document also specifies the evidence institutions must see and retain for audit to confirm eligibility.

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

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

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

Unaccompanied asylum seeking children

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

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

Bursaries for young people in defined vulnerable groups

Students who meet one of the 4 criteria below (plus the other criteria for age and residency) and who have a financial need can apply for a bursary for vulnerable groups of up to £1,200 per year (if they are participating on a study programme that lasts for 30 weeks or more; a pro-rata amount is paid to students on study programmes of less than 30 weeks). This reflects that students in these groups may need a greater level of support to enable them to continue to participate. Institutions must ensure that 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

Some institutions have asked for confirmation that students can claim Employment and Support Allowance or Universal Credit in their own right while living in the parental home. This is correct – students do not necessarily need to be living independently. Institutions may wish to remind parents (in any application form they use or on their websites) that they will not be able to continue to claim Child Benefit if the student successfully applies for ESA.

Institutions 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.

Equally, 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 and so do not need support from the scheme. For example, their financial needs are already met and/or they have no relevant costs.

Defining in care and care leavers

The 16 to 19 Bursary Fund defines 'in care' as 'Children looked after by a local authority on a voluntary basis (section 20 of the Children Act 1989) or under a care order (section 31 of the Children Act 1989) - Section 22 of the Children Act 1989 defines the term 'looked after child'.'

A 'care leaver' is defined as:

- a young person aged 16 and 17 who was previously looked after for a period of 13 weeks consecutively (or periods amounting to 13 weeks), which began after the age of 14 and ended after the age of 16; or
- a young person aged 18 or above who was looked after prior to becoming 18 for a period of 13 weeks consecutively (or periods of 13 weeks), which began after the age of 14 and ended after the age of 16

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.

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.

Universal Credit

Universal Credit 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 vulnerable groups based on receiving Universal Credit.

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

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, a copy of their Income Support award notice. They must be entitled to the benefit in their own right and the evidence must confirm that the young person can be in further education or training (some young people in receipt of benefits are not allowed to participate)
- for students in receipt of Universal Credit, a copy of their Universal Credit Award notice. They must be entitled to the benefit in their own right and the evidence must confirm that the young person can be in further education or training (some young people in receipt of benefits are not allowed to participate). They must also provide additional documentation to confirm their independent status, for example a tenancy agreement in the student's name, a child benefit receipt, children's birth certificates, utility bills etc
- for students receiving Universal Credit/Employment and Support Allowance and Disability Living Allowance and Personal Independence Payments, a copy of the student's Universal Credit or ESA award from DWP (UC claimants will be able to print off details of their award from their journal). 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

Pro-rata bursaries for vulnerable groups

Students who meet the criteria for a bursary for vulnerable groups are eligible for a bursary of £1,200 if they are on a study programme which lasts for 30 weeks or more in the academic year. Students 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 30 week programme attracts a bursary of £1,200 - if paid weekly, the bursary is $£1,200 \div 30 = £40$ per week
- if a student is on a 10 week programme, the pro-rata bursary would be $£40 \times 10 \text{ weeks} = £400$

Institutions can assess the amount of bursary using an hourly or daily rate if a student in one of the vulnerable groups is on a part time course. For example:

- a student on a full-time course which lasts for 20 weeks - their bursary could be calculated at the rate of $£40 \times 20 \text{ weeks} = £800$
- a student on a part-time course that takes 2 days a week and lasts for 20 weeks - if the daily rate for the bursary is £8 ($£40 \div 5 \text{ days} = £8$), then $£8 \times 2 \text{ days} = £16$ a week; $£16 \times 20 \text{ weeks} = £320$

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

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 are already met and/or they have no relevant costs. For example:

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

In these circumstances, institutions should explain to the student and/or the student's parents the aim of bursary funding and why no bursary is being awarded.

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

Institutions may wish to state in their 16 to 19 bursary fund application form that there is possibility of no award, or a limited award, of a bursary for vulnerable groups being the outcome of an application. This ensures all parties are clear 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.

Discretionary bursaries

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

Institutions decide which students receive a discretionary bursary. They set their own eligibility criteria for discretionary bursaries, 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.

Institutions must manage the number and size of discretionary bursary awards to keep within their budget. They may decide to retain a small emergency fund from their allocation to support students who face exceptional circumstances during the year that impact on their ability to participate. Institutions 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 that their bursary policy is designed to ensure 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, the number of dependent children in the household or whether the young person has additional responsibilities that may mean they need extra help, for example, they are a young carer or a parent.

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, the Department for Education is aware that some institutions are unsure about how to use Universal Credit award notices when these are offered as evidence of household income. The Department 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 Universal Credit after all deductions have been made 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 Universal Credit award notice](#)

PDF, 357KB, 1 page

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

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 from families who are ‘just about managing’; in other words, 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 that are engaged in initial extended work placement delivery are also encouraged to ensure their bursary policies are able to respond to the needs of those students who may incur extra travel costs, for example, to access their placement. Additional funding is being provided in the 2018 to 2019 academic year to support this.

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. The bursary fund is intended to help students overcome the specific financial barriers to participation they face, these will vary from student to student, depending on a range of factors, 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.

Publishing bursary fund statements

Institutions should publish a statement setting out how they will use their bursary fund. The statement should be published early enough for students to be able to use the information when deciding which post-16 institution to attend. The institution's eligibility criteria must be clear and available to students and to ESFA. The statement should be clear 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.

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. Further information on the [Equality Act 2010](#) is available online.

Bursary fund statements should clearly set out what type of help is being offered; for example, help with transport, books and equipment, field trips and other course-related costs and whether bursary support is available to contribute to the costs of attending university interviews and open days.

Institutions should 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.

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

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

Institutions must not make block or blanket payments to students that do not take account of their actual financial need.

Institutions must not use the bursary as a way of incentivising attendance.

Paying bursary funding to eligible students

The 16 to 19 bursary fund is intended to remove specific barriers to participation. Institutions can insist that students awarded bursary funds spend them on travel costs, meals during the day, equipment, or any other support that has been identified as necessary to enable them to participate in education.

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

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

Institutions are free to decide how often payments are made, taking into account the reason the bursary was awarded, the student's circumstances and local arrangements. However, it is good practice to make regular payments (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.

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](#).

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

Institutions can specify that students must return books and equipment at the end of their study programme to be used again by other students where appropriate. For example, if an institution decides a laptop or tablet is necessary for the student to complete their study programme, they can purchase this with bursary funds. However, the student should return the equipment to the institution once they have completed their study programme so it can be re-used by another student. If keeping a laptop or tablet on campus is the best way of ensuring this happens, institutions have the right to set this as a condition.

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 should ensure that any standards they set are clear, accessible and understood by students. Institutions should ensure that 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. The independent evaluation of the 16 to 19 Bursary Fund identified some students who had been sanctioned to the extent that their bursary funding

had been stopped for a whole term. This is not recommended as it can stop students attending and undermine the purpose of the bursary fund.

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

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

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 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 other means-tested benefits paid to families, such as Income Support, Jobseeker's Allowance, Child Benefit, Working Tax Credit and Housing Benefit.

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

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

Drawing down bursary funding for vulnerable groups from the SBSS

The Student Bursary Support Service (SBSS) make the payments for bursaries for vulnerable groups.

Institutions should draw down the funding from SBSS on demand, whenever they identify and verify new students who meet the criteria for a bursary for vulnerable groups. Institutions can submit as many funding claims as they need to throughout the academic year.

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 should draw the funding down by completing and submitting a bursary for vulnerable groups funding claim via the [SBSS online portal](#). Funding claim forms for the new academic year are available from August 2018. The deadline for the submission of 2018 to 2019 academic year funding claims is 31 July 2019. The SBSS will not pay any claims submitted after this date.

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

How the SBSS processes and pays funding claims

The SBSS will carry 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, SBSS will issue a funding statement (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 can request a change to their bank account details by completing the [BAN1s](#) form, or the [BAN1a](#) form (for academies). Completed forms should be e-mailed to: FASST.standingdata@education.gov.uk.

SBSS will issue a remittance advice 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. All ESFA funded institutions in receipt of a discretionary bursary allocation in the 2018 to 2019 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 may be dependent on whether an institution has signed and returned their ESFA funding contract.

Institutions who are not in receipt of a discretionary bursary allocation in the 2018 to 2019 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 2019. 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.

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

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 2019.

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

Discretionary bursary fund allocations

ESFA makes discretionary bursary allocations to institutions that have a 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 2018 to 2019 allocated student numbers and multiplied by the 2018 to 2019 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

Discretionary bursary allocations are paid in 2 parts - two-thirds in August; one-third in April. The first payment for academies is September, reflecting that this is generally the date of first payments to academies.

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. We will use the same data that has been used to generate High Needs Student (HNS) funding for 2018 to 2019. 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 also make discretionary bursary funding available to institutions that start delivering eligible education and training for ESFA for the first time in the 2018 to 2019 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.

Extended work placements

Extended work placements are likely to increase the demand for help from the discretionary bursary from students. They may need to travel further to access their placement and/or incur additional costs for equipment and clothing. Institutions delivering extended work placements have access to the Capacity and Delivery Fund (CDF); this funding can be used to support costs for students where necessary, for example,

travel costs.

However, in recognition that extended work placements are a new and additional requirement for institutions, ESFA is making additional discretionary bursary funding available to institutions delivering extended work placement in the 2018 to 2019 academic year. The additional funding is designed to reduce the risk of institutions having insufficient discretionary bursary funding to support the needs of student and, as a consequence, using a high proportion of their CDF funding for student travel (for example) to the detriment of capacity building.

The additional funding is being provided for the 2018 to 2019 academic year as a one-off/interim arrangement and institutions should not expect any additional funding in future years.

The additional funding has been calculated as follows:

Minimum number of students undertaking a work placement (10% 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)

A detailed explanation of how the additional funding has been calculated can be found in institutions 2018 to 2019 academic year allocations statements explanatory notes.

The additional funding is added to institutions discretionary bursary allocation and is not specifically ring-fenced for use only for students participating in work placements.

Where institutions' existing discretionary bursary allocation is sufficient to cover the costs of students accessing extended work placements, i.e. 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 placements, as long as the placement is a defined part of their study programme. Young parents must ensure they include the dates of their extended work placement in their Care to Learn application.

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

Managing bursary underspends

Institutions are permitted to carry unspent bursary funds over to the next academic year. Any funds that

are 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.

ESFA wishes to remind institutions that discretionary bursary and/or free meals funding cannot be carried forward for more than one year. Institutions must contact ESFA to arrange to return any unspent funds they hold from any year prior to 2017 to 2018: enquiries.efa@education.gov.uk.

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. This is similar to the in-year growth process for 16 to 19 programme funding and will release additional funding to institutions where ILR/census data indicates it is needed. This process will factor in delivery of extended work placements and consider business cases where institutions have clear and evidenced reasons for additional funding. 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. [Audit guidance](#) is available. Institutions should ensure they have appropriate processes in place to record bursary applications and awards (including the number, value, purpose, whether awarded or not, and a brief justification for the decision).

Institutions 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
- evidence of payments made to the student

For the discretionary bursary:

- evidence used to assess eligibility, such as a letter from DWP or evidence of household income, including any 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 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 students 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 help and encourage students to apply for a bursary. Institutions and local authorities can also set up local data sharing agreements to share information about which students might be eligible and who should be supported to make an application. For example, institutions might want to ask their local authority if a young person received free school meals in year 11.

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

- 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 be eligible for a bursary for vulnerable groups are identified by another college's Inclusion Manager who has developed links with local agencies working with vulnerable young people (YMCA, Social Services, and Youth Offending Teams). This helps the college identify eligible young people before enrolment so they become aware of the bursary early. They are then assisted in completing the application process
- 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. From September 2018, all school sixth forms, 16 to 19 academies and specialist post 16 institutions will have the same access as colleges currently do.

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.

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 can help take account of the needs and circumstances of students in the local area. This could include institutions working together to identify and support eligible students, pool funds and centrally manage and administer the bursary. 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.

Managing applications for the 16 to 19 Bursary Fund

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

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

The institution's bursary fund statement, their bursary fund application form and any promotional materials they may use should all make clear whether there are key dates for applications they want students to meet.

The application process the institution puts in place must involve processes that maintain confidentiality and their application form, promotional materials etc. should emphasise this message, so students don't feel embarrassed about applying.

Applications and information should all be clear that students who meet the criteria for bursaries for vulnerable groups are not automatically entitled to them 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.

Paying bursary funding to students

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

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

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

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. The remainder is paid to the student in regular instalments. 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, and where money remains, an amount is retained for unforeseen costs
- one institution pays students a greater amount of funding at the start of their course so students 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. A percentage of the total bursary funding is kept back as a hardship fund to respond to emergencies that may arise later in the year

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 or at: 1619bursary@studentbursarysupport.co.uk.

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