



## **16 to 19 Bursary Fund: a summary:**

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 that eligible learners can access:

- 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

Asset Training receives a 16-19 Bursary Funding Allocation from the ESFA and it is from this allocation that learners can, if they are eligible, access discretionary Bursary Funding either in kind or as cash payments. It is not our policy to pay learners weekly cash payments without detailed information as to why the individual learner would benefit from this kind of support rather than receiving in kind support.

Bursary Awards will be targeted towards 16-19 learners facing financial barriers to participation, such as the cost of transport, meals, books, suitable clothing for their chosen career path and equipment. If the Learners household is below £25,000 (2018/19) and/or in receipt of an 'income based benefit', they may be eligible for a discretionary bursary. By 'income based benefit' we mean the following:

- Income Support
- Working Tax Credit / Child Tax Credit
- Income based Employment and Support Allowance
- Universal Credit
- Other benefits and pensions

Evidence must be submitted with the Bursary Application Form of the above benefit before a bursary can be awarded. All applications and supporting evidence will be reviewed and Learners will be informed of the Bursary Award Decision by letter at the earliest opportunity following receipt of the Bursary Application. All documentation received will remain confidential.

Any monetary payments that will be made to an individual learner will either be paid in cash directly to the learner and which must be signed for by the learner on receipt or via BACS payments directly into the learners own bank account.

### **Conditions for receiving bursary funding:**

Payments to learners both for the Vulnerable Bursary and the Discretionary Bursary are conditional on the learner meeting agreed standards of attendance and behaviour. These are:

- Attendance as specified on the training Plan
- Good standards of behaviour
- Learning outcomes in line with agreed targets as appropriate

Learners may be awarded **one** bursary only based on their individual circumstances.

For eligible learners the Discretionary Bursary fund can help towards the cost of essential course-related costs such as travel to placements / training facilities, equipment, books, essential trips, clothing in support of their chosen career path, food and attending job interviews. Receipts must be produced in support of any of the above in order repayment can be made to the learner / course facilitator.

This Policy has been produced in line with the ESFA 16-19 Bursary Fund Guide which can be accessed via this link: <https://www.gov.uk/guidance/16-to-19-bursary-fund-guide-2018-to-2019-academic-year>

## **Eligibility Criteria as detailed in the ESFA Guidance:**

### **Age**

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

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

- continuing on a study programme which includes Traineeships that they began aged 16 to 18 ('19+ continuers')
- OR
- have an Education, Health and Care Plan (EHCP).

These 2 groups of aged 19 plus Learners 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 we consider they need the additional support to continue their participation.

**Learners aged 19 or over are not eligible for either bursaries for Vulnerable Groups or for Discretionary Bursary funds.**

**Learners 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 Learners 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

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

The ESFA does not expect Learners 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 Learner 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 Learner to attend exams.

### **Residency**

Learners 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 Learner 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 Learner 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**

Learners 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 Learners on study programmes of less than 30 weeks). This reflects that Learners in these groups may need a greater level of support to enable them to continue

to participate. Institutions must ensure that Learners are eligible for the bursary for defined vulnerable groups in each year they require support.

The defined vulnerable groups are Learners 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 Learners can claim Employment and Support Allowance or Universal Credit in their own right while living in the parental home. This is correct – Learners 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 Learner successfully applies for ESA.

Institutions can pay a bursary to a vulnerable group Learner 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 our discretionary bursary allocation or from our own funds.

Equally, we 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 Learners 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 Learner 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 Learners are eligible for a bursary for vulnerable groups. Institutions should ask for evidence from each Learner and retain copies for audit purposes. For example:

- for Learners 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 Learners 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 Learners 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 Learner's name, a child benefit receipt, children's birth certificates, utility bills etc
- for Learners receiving Universal Credit/Employment and Support Allowance and Disability Living Allowance and Personal Independence Payments, a copy of the Learner'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

We can only submit a funding claim to the Learner Bursary Support Service (SBSS) for bursaries for vulnerable groups when they have seen and have verified appropriate evidence to confirm that the Learner is eligible.

### **Pro-rata bursaries for vulnerable groups**

Learners 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. Learners 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 Learner is on a 10 week programme, the pro-rata bursary would be  $£40 \times 10$  weeks = £400

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

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

## **Young people 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 Learner attending specialist residential provision that covers their educational costs in full
- a Learner 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 Learner in local authority care whose educational costs are covered in full by the local authority
- a Learner who is financially supported by their partner

In these circumstances, we will explain to the Learner and/or the Learner's parents the aim of bursary funding and why no bursary is being awarded.

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

## **Discretionary bursaries**

Institutions make discretionary bursary awards to Learners 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 Learners 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 Learners 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 Learners 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 Learners who are in need.

There is no set limit for the amount of discretionary bursary that can be awarded to Learners. 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 Learner requires this level of funding.



## Using household income and establishing individual Learner need

Institutions must ensure that their bursary policy is designed to ensure funding reaches those Learners 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 Learner. 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 Learners/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.

Example of a Universal Credit monthly award notice

<b>How your Universal Credit payments are worked out</b>	
This is based on your circumstances between 1 December 2017 and 31 December 2017	
<b>1. First, we bring together the basic parts of Universal Credit that apply to you.</b>	
<b>Standard Allowance for you and your partner</b>	£498.89
<b>Housing Element</b>	£354.68
<b>Child Element</b> From 06/04/2017 Universal Credit will only pay the child element for 2 children or qualifying young people unless certain exceptions apply. For further information on when an exception may apply, see <a href="http://www.gov.uk">www.gov.uk</a>  Children on your claim XX XX We pay £277.08 for your first child or qualifying young person. For each other eligible child or qualifying young person, we pay £231.67  ESFA note: there can be other/different elements in this section.	£508.75
<b>Amount</b>	<b>£1,362.62</b>
<b>2. Next, we take account of any non-work income and other benefits you receive as well as your savings and capital.</b>	
<b>The total we take off for these items is:</b>	<b>£0.00</b>
<b>3. We then take account of your take-home pay</b>	
Take-home pay is what's left after tax, National Insurance and any pension contributions have been deducted.	
Your take-home pay for this period is <b>£1,352.85</b>	
The first £192.00 of your take-home pay doesn't affect your Universal Credit monthly amount. Every £1.00 you earn in take-home pay over this £192.00 reduces your Universal Credit by 63 pence.	
	£731.34
<b>The total we take off for take-home pay is:</b>	<b>£731.34</b>
<b>4. Lastly, we take account of any loans, advances, deductions and overpayments or third party payments you have.</b>	
Social Fund	£22.15
Budgeting Allowance	£15.00
<b>The total we take off for these items is:</b>	<b>£37.15</b>
<b>Total adjustments</b>	<b>£768.49</b>
<b>Your Universal Credit monthly payment for this period</b>	<b>£593.83</b>

ESFA note: institutions should use the two highlighted figures, take-home pay and the amount of Universal Credit after deductions, when assessing household income.

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 Learners who need it. For example, Learners 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 Learners 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 Learners 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 Learners receive a discretionary bursary and how much bursary they receive must be based on each Learner’s individual circumstances and their actual financial need. The bursary fund is intended to help Learners overcome the specific financial barriers to participation they face, these will vary from Learner to Learner, 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 Learners or to Learners in particular income bands without considering the actual needs of each Learner.