



Guidance

16 to 19 Bursary Fund guide: 2024 to 2025 academic year

Published 8 May 2024

Applies to England

Contents

1. Summary
2. Key points for the 2024 to 2025 academic year
3. Eligibility criteria: all bursaries
4. Eligibility criteria: bursaries for young people in defined vulnerable groups
5. Assessing eligibility and awarding support
6. Publishing Bursary Fund policies
7. Managing Bursary Fund applications
8. 16 to 19 Bursary Fund and receiving DWP benefits
9. Funding and allocations: bursary for defined vulnerable groups
10. Funding and allocations: discretionary bursaries
11. Rules for returning unspent bursary funds
12. In-year growth
13. Data returns, including the ILR and school census
14. Audit, assurance and fraud

15. Free meals in further education
16. Other useful information
17. Good practice
18. Further information



© Crown copyright 2024

This publication is licensed under the terms of the Open Government Licence v3.0 except where otherwise stated. To view this licence, visit nationalarchives.gov.uk/doc/open-government-licence/version/3 or write to the Information Policy Team, The National Archives, Kew, London TW9 4DU, or email: psi@nationalarchives.gov.uk.

Where we have identified any third party copyright information you will need to obtain permission from the copyright holders concerned.

This publication is available at <https://www.gov.uk/government/publications/16-to-19-bursary-fund-guide-2024-to-2025-academic-year/16-to-19-bursary-fund-guide-2024-to-2025-academic-year>

1. Summary

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

There are 2 types of 16 to 19 bursaries:

- bursaries for defined vulnerable groups
- discretionary bursaries that institutions award using policies they set, in line with these funding rules

Bursary funding is to help eligible students with costs such as travel to and from school or college or buying essential books, equipment or specialist clothing (such as protective overalls, for example) that are required for their study programme. These are items the student would otherwise need to pay for to participate.

The Bursary Fund is not intended to provide learning support – services that you give to students, for example, counselling or mentoring – or to support extra-curricular or non-compulsory activities that are not essential to the students' study programme or to provide living costs support.

Any references to 'we' or 'us' are to Education and Skills Funding Agency (ESFA). Where we refer to 'you' or 'institution', this means education institutions (colleges, schools, academies, for example).

Unless explicitly stated as applying to the bursary for defined vulnerable groups or to the discretionary bursary, all the funding rules set out in this guide apply to the Bursary Fund as a whole.

2. Key points for the 2024 to 2025 academic year

2.1 Assess actual needs

You must ensure you assess the actual needs of all individual students in addition to eligibility when awarding bursary funding. This means you must award each student support based on their actual participation needs, not make flat or fixed rate payments to students that do not reflect the actual costs they face. The requirement to assess actual needs each year continues to apply if

you exercise discretion not to carry out household income assessments annually for the discretionary bursary.

Both types of bursary funding (discretionary and defined vulnerable groups) are designed to help students overcome the individual financial barriers to participation they face, and you must ensure funds go to those who genuinely need them. Students should only receive bursary funding to support the actual costs they incur to enable them to participate.

2.2 Checklist to support application assessment

This guide includes a [checklist \(https://www.gov.uk/government/publications/16-to-19-bursary-fund-guide-2024-to-2025-academic-year\)](https://www.gov.uk/government/publications/16-to-19-bursary-fund-guide-2024-to-2025-academic-year) that institutions can use when assessing bursary applications from students and a [summary \(https://www.gov.uk/government/publications/16-to-19-bursary-fund-guide-2024-to-2025-academic-year\)](https://www.gov.uk/government/publications/16-to-19-bursary-fund-guide-2024-to-2025-academic-year) that lists the most important things institutions need to consider when administering the 16 to 19 Bursary Fund. These reflect common errors and issues identified during audits.

2.3 Essential participation costs

We remind you that the Bursary Fund is intended to help students with the essential costs of participating in their study programme, so to help with the cost of essential books or equipment or with the cost of travelling to school or college, for example. The Bursary Fund may be used to provide exceptional further help with childcare costs for those young parents in receipt of Care to Learn (C2L) whose costs exceed the scheme's weekly maximum rates. Only childcare provision eligible under the [C2L scheme \(https://www.gov.uk/government/publications/care-to-learn-guide-for-the-2024-to-2025-academic-year\)](https://www.gov.uk/government/publications/care-to-learn-guide-for-the-2024-to-2025-academic-year) rules can be used and you must hold evidence that the maximum amount is being paid under C2L to confirm that a top up is required. Any top up you pay must be made in line with the C2L guidance and paid directly to the childcare provider, not to the student.

The Bursary Fund is not intended to support costs not related to education (living costs), extra-curricular or non-compulsory activities or to provide learning support – services that institutions give to students – such as counselling, mentoring or extra tutoring.

2.4 Rules for returning unspent 16 to 19 Bursary Funds

You are reminded that you cannot carry forward bursary funding for more than one year. **You must inform us of the total amount of any unspent funds (not previously reported) from any year up to and including the 2022 to 2023 academic year.**

Unspent funding must be reported via our [customer help centre](https://customerhelp.education.gov.uk/hc/en-gb) (<https://customerhelp.education.gov.uk/hc/en-gb>). You must specify the amount of funding and the year/s it relates to. You should do this as soon as you are aware; however, you must report it no later than 31 March each year. We will recover all unspent funds.

2.5 Household income checking

[Section 5](#) in this guide specifies 'institutions must ensure that students are eligible for the discretionary bursary in each year they require support'. Following discussion with institutions and recognising both the administrative burden of handling large numbers of bursary applications in a short space of time, and the need to maximise retention of students facing financial disadvantage, we relaxed this requirement. so that you can now exercise discretion as to whether you carry out household income checks annually or just once at the beginning of a student's study programme.

If you decide not to conduct annual checks of household income eligibility, you must ensure a signed and dated (hard copy or electronic) self-declaration form is obtained from the student to confirm that their household circumstances have not changed.

2.6 Emergency meal support

In academic year 2022 to 2023, we introduced a flexibility to enable you to use your Bursary Fund in individual cases of severe hardship (a student you consider to be in real need) for meal support on the days a student attends their study programme without undertaking the checks on household income or gathering other evidence that would normally be required. This flexibility remains in place, but we remind you that we expect this to only apply to a very small number of the total 16 to 19 student cohort.

For audit purposes, you must retain a copy of:

- a record of the number of students supported in this way
- the number of days this support is given

- the value (£) of support given to each student along with the rationale for the meal support
- receipts to support expenditure on food, or signed confirmation by the student of receipt of funding to be spent on food that day

We do not expect this arrangement to continue on an ongoing basis for any individual student – this is a short-term arrangement, and you should ultimately assess the student’s household income and participation needs in the usual way. You must be mindful that this flexibility relates to food support only.

3. Eligibility criteria: all bursaries

Students must meet the age and residency criteria which follow to be eligible for help from the bursary fund.

3.1 Age

A student must be aged 16 or over but under 19 on 31 August 2024 to be eligible for help from the Bursary Fund in the 2024 to 2025 academic year, except for the following exceptions:

- students aged 19 or over are 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 (EHC) plan

These 2 groups of aged 19+ students can receive a discretionary bursary while they continue to attend education (in the case of a 19+ continuer, this must be the same programme they started before they turned 19), as long as their eligibility continues, and you consider they need the support to continue their participation. Students aged 19 or over are not eligible for bursaries for vulnerable groups.

You should generally only pay bursaries to students aged 16 or over. However, in exceptional circumstances where under 16 students are on funded 16 to 19 study programmes at the institution, you may use your discretion to pay bursaries to younger students. For example, where a student is following an accelerated study programme.

Bursary funds should not be awarded to students enrolled at another institution, where that institution also receives public funding for the student, for example, students aged 14 to 16 who are attending college as part of their key stage 4

programme at a local school/academy. The [ESFA funding regulations for post-16 provision \(https://www.gov.uk/government/publications/advice-funding-regulations-for-post-16-provision\)](https://www.gov.uk/government/publications/advice-funding-regulations-for-post-16-provision) provide more detail about funded 14 to 16 year olds.

Students aged under 19 enrolled on higher education qualifications are not eligible for support from the 16 to 19 Bursary Fund.

3.2 Eligible education provision

Students must be participating in provision that is subject to inspection by a public body that assures quality (for example, Ofsted). The provision must also fall into one of these groups:

- funded directly by us, or by us via a local authority
- otherwise publicly funded and lead to a qualification (up to and including level 3) accredited by Ofqual or on our list of [qualifications approved for funding \(https://www.qualifications.education.gov.uk/\)](https://www.qualifications.education.gov.uk/)

Students on apprenticeship programmes, on any waged training or are employed, rather than in education, 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.

We do 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 is intended to cover (travel, equipment and uniforms, for example). In the rare instances where an institution identifies such a student does require financial help, you should provide support in-kind. An example could be providing a temporary travel pass for the student to attend exams.

3.3 Residency

Students must meet the residency criteria in [ESFA funding regulations for post-16 provision \(https://www.gov.uk/government/publications/advice-funding-regulations-for-post-16-provision\)](https://www.gov.uk/government/publications/advice-funding-regulations-for-post-16-provision). This guidance also specifies the evidence institutions must see and retain for audit to confirm eligibility for post-16 funding (and therefore meet the residency criteria for Bursary Fund eligibility).

3.4 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, you can provide in-kind student support such as books, equipment or a travel pass. Under no circumstances should you give cash to any asylum seeker unless they are an unaccompanied asylum-seeking child.

3.5 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) if they have a financial need.

When these young people reach legal adulthood at age 18, you 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).

4. Eligibility criteria: bursaries for young people in defined vulnerable groups

Students who meet the criteria, and who have a financial need, can apply for a bursary for vulnerable groups. The defined groups reflect that these students are unlikely to be receiving financial assistance from parents or carers, so may need a greater level of support to enable them to continue to participate.

Students should be awarded the amount of support they need to participate based on an assessment of the actual costs they have and must not be automatically awarded £1,200.

Bursary funding exists to help students with the cost of travel, to buy essential books, equipment or specialist clothing (such as protective overalls, for example). These are items the student would otherwise need to pay for to participate. The Bursary Fund is not intended to provide learning support – services that you give to students, for example, counselling or mentoring, or to support extra-curricular or non-compulsory activities that are not essential to the students' study programme or to provide living costs support.

You must ensure students are eligible for the bursary for defined vulnerable groups in each year they require support.

The defined vulnerable groups are students who are:

- in care
- care leavers
- receiving Income Support (IS), or Universal Credit (UC) 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 (DLA) or Personal Independence Payments (PIP) in their own right as well as Employment and Support Allowance (ESA) or UC in their own right

The managed move of legacy benefits claimants to UC means that new claims for the legacy benefits have not been possible since 2018. This means young people who are aged 16 to 18 now will not be in receipt of the legacy benefits listed above. However, students aged 19 to 25 and funded from the 16 to 19 budget (continuing students and those with an EHC plan) may still be in receipt of those other legacy benefits.

The bursary for vulnerable groups can pay up to £1,200 per year to a student participating on a study programme that lasts for 30 weeks or more if they need that amount of support. Students on study programmes of less than 30 weeks should be paid a pro-rata amount, as appropriate, based on an assessment of their actual needs.

You must also consider the number of hours involved in a student's study programme when deciding if a pro-rata payment is more appropriate. A student studying for around 16 hours a week is likely to have greater costs than a student studying for 4 hours a week, for example.

Students should only receive the amount they need to participate, and institutions must not automatically award students £1,200 if they do not need the full amount.

You may decide that although a young person may be eligible for a bursary because they are in one or more of the defined vulnerable groups, they do not have any actual financial need. This might be because their financial needs are already met and/or because they have no relevant costs. You can refuse a student's application on this basis.

Equally, you can pay a bursary to a vulnerable group student of more than £1,200 if you assess they need extra help to remain in education. Any payments over £1,200 must be paid from your discretionary bursary allocation or from your own funds. If paid from discretionary bursary, all the eligibility criteria and usual assessment processes must be met and followed. You must ensure your auditable records explain the type, purpose and amount of all funding awards.

Free meals in further education

<https://www.gov.uk/government/publications/free-meals-in-further-education-funded-institutions-guide-2024-to-2025-academic-year> has its own eligibility criteria and a student who meets the criteria for a defined vulnerable group bursary is not automatically eligible for a free meal.

4.1 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:

1. 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
2. a young person aged 18 or above who was looked after before becoming 18 for a period of 13 weeks consecutively (or periods amounting to 13 weeks), which began after the age of 14 and ended after the age of 16

Only students who meet this definition are eligible if they have a financial need.

4.2 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 meet the criteria for the 'in care' vulnerable group if they have a financial need.

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 must meet the definition of a 'care leaver' in full (so, the period of weeks and age range set out above). If they do, they are eligible for help from the bursary for vulnerable groups, where they need financial support to participate.

4.3 Universal Credit

UC has replaced IS and ESA as well as other benefits, for new claimants.

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

Department for Education (DfE) is keeping the situation surrounding the legacy benefits (above) under review, to ensure the descriptions of the defined vulnerable groups reflect the benefits situation.

Bursary funds awarded to a student should not form part of the UC assessment undertaken by the Department for Work and Pensions (DWP). How DWP treats any funding for education depends on whether the student is undertaking advanced full-time education.

It is unlikely that 16 to 18 year olds will be in advanced full-time education as they are generally on study programmes at level 3 or below. Since the full roll out of UC, any current and future 16 to 18 year old can only claim UC. They can no longer claim IS or income related ESA.

Under UC, any educational award which is paid under a scheme to enable persons under age 21 to complete a course of non-advanced education (which

will include the 16 to 19 Bursary Fund) does not fall to be treated as grant income for UC purposes – as provided under [regulation 68\(7\) of The Universal Credit Regulations 2013](https://www.legislation.gov.uk/ukxi/2013/376/regulation/68) (<https://www.legislation.gov.uk/ukxi/2013/376/regulation/68>).

4.4 Evidence of eligibility

You must obtain proof that students meet the criteria for the bursary for vulnerable groups in full. In other words, that they are in receipt of the specified benefits in their own name or that they fully meet the definitions for in care/care leavers. You must ask for evidence from each student and retain copies for audit purposes:

- 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 UC or IS, a copy of their UC or IS claim/award notice. This must clearly state that the claim is in the student's name/confirm they are entitled to the benefit in their own right. The evidence must not state any conditions that prevent them from participating in further education or training. For students in receipt of UC, you must also see a document such as a tenancy agreement in the student's name, a child benefit receipt, children's birth certificates or utility bills
- for students receiving UC/ESA and DLA and PIP, a copy of their UC claim from DWP and evidence of receipt of DLA or PIP

UC claimants should be able to print off details of their award from their online account or provide a screenshot to the institution.

Students can also contact their UC work coach (or relevant benefit office if they are receiving IS or ESA) and ask them for help in providing evidence of receiving benefits.

Funding claims for the bursary for defined vulnerable groups are managed through the [Student Bursary Support Service \(SBSS\) online portal](https://studentbursary.education.gov.uk/w/webpage/1619bursary) (<https://studentbursary.education.gov.uk/w/webpage/1619bursary>). You must only submit a funding claim:

- when you have seen and verified appropriate evidence to confirm that the student is eligible for the bursary for vulnerable groups
- when you have assessed the actual amount of financial help the student needs to participate. It is the actual amount that institutions should request on the SBSS funding, not automatically a request of £1,200

4.5 Pro-rata bursaries for vulnerable groups

Students who meet the criteria for a bursary for vulnerable groups, who have a financial need, but are on a study programme that lasts for less than 30 weeks should be given a bursary on a pro-rata basis. The actual amount is dependent on the assessment of their specific financial needs.

For example:

- a student is on a 30-week programme. If you assess they have financial needs that require a full £1,200, the bursary may be $£1,200 \div 30 = £40$ per week
- if the same student was on a 10-week programme, the pro-rata bursary may be $£40 \times 10 \text{ weeks} = £400$

You should also consider the number of hours involved in a student's study programme when deciding if a pro-rata payment is more appropriate. A student studying for around 16 hours a week is likely to have greater costs than a student studying for 4 hours a week, for example. We do recognise that some study programme costs may be 'fixed' in nature, for example, course equipment costs.

4.6 Young people eligible for a bursary for vulnerable groups who do not require bursary funding

In some cases, a young person might meet the eligibility criteria for a bursary for vulnerable groups, but their financial needs are already met and/or they have no relevant costs.

For example, a student:

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

In these circumstances, you can refuse the student's application. You should explain to the student and their support worker/parent where applicable, the aim of bursary funding and why you are not awarding any bursary.

We recommend you are clear in your Bursary Fund application form that there is a possibility of no award or a limited award. This ensures all parties understand that meeting the criteria for a bursary for vulnerable groups does not automatically entitle them to funding and that an assessment of their actual costs will be undertaken. You must ensure your forms avoid any terminology such as 'guaranteed bursary' or wording such as 'you will automatically get a bursary of £1,200 if you are in one of the defined groups'.

5. Assessing eligibility and awarding support

You make bursary awards to help students with the cost of travel, to buy essential books, equipment or specialist clothing (such as protective overalls, for example). These are items the student would otherwise need to pay for to participate.

The Bursary Fund is not intended to provide learning support – services that you give to students, for example, counselling or mentoring – or to support extra-curricular or non-compulsory activities that are not essential to the students' study programme or to provide living costs support. We do recognise that some students may need items of clothing and/or footwear to be able to access further education and to continue to participate. Such items may be eligible for exceptional support from the Bursary Fund, but you must ensure any such expenditure is genuinely and directly about the student accessing their education provision.

You must retain evidence of expenditure for audit purposes, including the rationale, amount and purpose, along with receipts.

For the discretionary bursary, you set your own eligibility criteria but must comply with the eligibility conditions and funding rules set out in this guide. You must ensure that students are eligible for, and need help from, the Bursary Fund each year.

You must base all decisions about which students receive a bursary and how much bursary they receive on each student's individual circumstances and their actual financial need. These will vary from student to student, depending on, for example, eligibility based on household income (for the discretionary bursary) and their actual financial needs such as the distance they need to travel to the institution and the requirements of their study programme.

You must not make blanket or flat rate/fixed rate payments:

- to all students

- to students in particular income bands
- to students whose families are in receipt of particular benefits

To give an example on the last point above, if a student had previously benefitted from a free school meal, this may indicate they have financial needs, but the actual need will vary depending on personal circumstances. An individual assessment of actual need should be made to determine this.

You must manage your discretionary bursary awards to keep within your budget.

You may decide to retain a small emergency fund from your allocation to support students who face exceptional circumstances during the year due to a change in their situation, if it impacts on their ability to participate in education. Evidence of eligibility, individual assessment and actual participation costs must be held for audit purposes as for any other Bursary Fund application/award and all bursary expenditure must be in line with the funding rules in this guide. You may also choose to top up the bursary with your own funds.

There is no set limit for how much discretionary bursary that can be awarded to students. You can award discretionary bursaries equal to or higher than the bursary for vulnerable groups maximum if you have clearly identified an individual student has actual costs that require this level of funding to participate. The rationale, types of costs and amount of funding must be included as part of your auditable records.

5.1 Using household income and establishing individual student need

You must ensure your discretionary bursary policy is focused on making sure funding reaches those students who are most in need of financial support. This means you must use household income in some way to help establish which students are eligible for the discretionary bursary before confirming the actual amount of support a student may need. You can decide to use household income in conjunction with other factors, such as distance to travel from the institution and the number of dependent children in the household, as well as the actual participation needs the student has.

It is for institutions to decide the process they use to assess household income; the household income levels they use and the specific evidence they request from students/ their families. However, DfE is aware that some institutions are unsure about how to use UC award notices when these are provided as evidence of household income. DfE suggests you may wish to ask for the 3 most recent monthly award statements. The take-home pay figure in addition to

the amount of UC after all deductions will give a total monthly income. Using 3 months' statements will act as a guide to the household income for a quarter of a year. You could then estimate assumed income for a full year.

To give an example, the screenshot from a claim below shows 'What we take off (deductions).' This shows the take-home pay that UC takes into account (in the example, it is £10). This section will show earnings reported by an employer or self-employed income and expenses reported by the claimant, as appropriate. The formatting of the claim in a mobile view and desktop view will look slightly different, but both will contain the same information.

Assessment period: 14 May to 13 June 2024
[Need help understanding your assessment period?](#)

Your payment this month is

£387

This will be paid by 8pm on 20 June 2024

What you're entitled to

Standard allowance	£393.45
<small>You get a standard amount each month. You said you're single.</small>	
Total entitlement before deductions	£393.45

What we take off (deductions)

Take-home pay	-£5.50
<small>Need help understanding take-home pay? Take-home pay is what's left after tax, National Insurance and any pension contributions have been deducted.</small>	
Earnings reported by you	£10.00
<small>The amount we'll use to work out your Universal Credit is £10.00</small>	
Your total take-home pay for this period is £10.00	
<small>Every £1.00 you earn in take-home pay reduces your Universal Credit by 55 pence.</small>	
Total deductions	-£5.50
Your total payment for this month is	£387.95

You are encouraged to keep your bursary policies under review to ensure you continue to provide support to students who need it. For example, students from households being supported via lower income jobs could be in more financial need than a student receiving free school meals or where the family receives other benefits. An assessment of individual need should help to identify whether they are struggling to afford the books and equipment they need or to cover their essential travel costs.

6. Publishing Bursary Fund policies

You must publish a policy or statement setting out how you will use your Bursary Fund. The policy should be available early enough for students to use the information when they are making decisions about their post-16 options. Your eligibility criteria must be clear and available to us and to students. The policy must state that the support available is from the 16 to 19 Bursary Fund

and you must be mindful of this if you develop your own financial support branding, and/or use your own funding to enhance your offer to students.

You must comply with the requirements of the [Equality Act 2010](https://www.legislation.gov.uk/ukpga/2010/15/contents) (<https://www.legislation.gov.uk/ukpga/2010/15/contents>) when setting your criteria and must not discriminate against your students, either directly or indirectly, because of their protected characteristics.

Bursary Fund policies must clearly set out what type of help you offer, for example, help with transport, books and equipment and other essential course-related costs and whether bursary support is available to contribute to the costs of attending industry placements, university interviews/open days or, at institutions' discretion, to top up to C2L funding, where necessary and appropriate.

Bursary funding can only be used to support the costs of field trips that are an essential part of achieving a student's study programme goals.

You should remember that while the 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 to set out their arrangements to facilitate participation in education or training for students aged 16 to 19. You should consider the relevant local authority's transport statement and local offers when setting your bursary policy.

7. Managing Bursary Fund applications

You develop and use your own application forms for students to apply for support from the Bursary Fund. Application forms must capture all the relevant information for you to assess the application in line with the bursary rules, including defined vulnerable groups, household income and the actual financial needs the student has to support their participation (such as help with travel or to buy essential books or equipment for example). The student must sign the application form.

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

However, it is important to bear in mind that a student's circumstances and needs may change later in the year. A small emergency fund may be retained for this purpose but, consequently, we recommend that there should be no absolute cut-off point for applications.

Institutions delivering short programmes, roll-on roll-off provision, or industry placements, should enable students to apply for help from the Bursary Fund at any point during the year.

Your application process must maintain confidentiality and your application form, promotional materials and so on, should emphasise this message, so students do not feel embarrassed about applying.

Application forms, bursary policies and any supporting information must all be clear that students who meet the criteria for bursaries for vulnerable groups are not automatically entitled to a bursary, or to a fixed amount of bursary, if they do not have financial needs and/or their financial needs are covered from other sources. They may receive a lower amount of bursary or no bursary, if they do not have any actual participation costs.

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.

You must communicate the outcome of the application to the student (the amount of bursary awarded and for what purpose/what types of costs, for example travel). You should also inform them how the costs will be paid, so in kind or by payments to their bank account. You must set out clearly what terms and conditions you are attaching to the funding, such as attendance, when you require any receipts to be provided, or when you require equipment to be returned, for example. You must hold a record of the planned amount of funding required for each participation need, based on the actual needs of the student.

7.1 What the Bursary Fund cannot be used for

The Bursary Fund (discretionary bursary and bursary for defined vulnerable groups) is not intended to:

- provide learning support – services that institutions give to students. Examples include counselling, mentoring, extra tutoring or support such as servicing laptops/tablets
- support extra-curricular activities where these are not essential to the students' study programme
- support the costs of foreign/overseas field trips where the content can be found within England at a much cheaper cost and/or to support the costs of

fields trips that are not an essential part of a student's study programme goals

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

- fees for access to facilities in the institution
- block subsidy of the canteen
- block subsidy of transport, or support for travel for all students regardless of family incomes
- block provision of equipment, material or books
- making bonus payments to reward attendance or achievement
- payments to support students' general living costs

You must not use the bursary as a way of incentivising attendance (for example, to award or guarantee additional payments if a student achieves specific attendance targets) or as a marketing tool to encourage students to choose one institution over another.

If you use non-bursary funds to provide free travel for all your students, you must make clear this is an offer from the institution and not support from the Bursary Fund.

7.2 Paying bursary funding to eligible students

We encourage you to pay both defined vulnerable group and discretionary bursaries to students in-kind rather than cash as far as possible. This helps ensure 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.

When you make in-kind payments, you should explain to the student the value of the payments and, if appropriate, how these have been deducted from their total bursary award.

When you 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.

You must insist that students only spend the bursary payments you make to them on the support that has been identified as necessary to help them participate in education. This means you must specify students can only use the funds to pay for travel costs and/or a meal during the day (this would usually be lunch though in some cases you may decide breakfast support is

needed as well in exceptional circumstances), to buy equipment or any other support that has been agreed. You should make the value of the award and any terms/conditions clear to the student in their award letter/confirmation document.

Receipts for expenditure and purchases made with bursary funding form part of the audit and assurance requirements. Receipts are evidence that funding is being used for the reasons it was awarded. For standard weekly costs like travel and food, it may not be practical to collect receipts for every transaction, so costs may be evidenced initially by receipts then paid after that linked to attendance. Students could then be asked to provide receipts to the institution at various points in the year (for example) which could form part of the terms and conditions you specify in your award letter/confirmation document to students.

You should remember that the purpose of the bursary is to provide help to those who need it to participate and remain in education. Asking students to incur expenditure and provide a receipt first before providing any funding does not reflect the policy intent which is why payment in kind rather than in cash is recommended.

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

Where payments are made, it is good practice to make these on a regular basis (weekly, for example) as this helps students manage their finances. It also means that if a student has a payment withheld due to failing to meet the conditions you have set, they will not be left without financial support for a long period. However, you should take decisions based on the reasons the bursary was awarded, the student's circumstances and local arrangements.

You should not make large or lump sum bursary payments to students.

7.3 Conditions for receiving bursary funding

You should make payments for the bursary for defined vulnerable groups and the discretionary bursary conditional on the student meeting agreed standards of attendance and behaviour. You must ensure the standards you set are clear and that students understand them. Examples might be attending all required classes, demonstrating agreed standards of behaviours and so on.

You should ensure you 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.

You can withhold payments if a student does not meet agreed standards, but you should always consider the individual circumstances of the student. Sanctioning a student to the extent that their bursary funding is stopped for a whole term, for example, is not recommended as it can stop students attending and undermine the purpose of the bursary.

If you purchase books or equipment, such as a laptop or internet dongle, that is necessary for the student to complete their study programme, you can purchase it with bursary funds. We recommend you specify the student must return it once they have completed their study programme so it can be used again by another student where appropriate. If keeping equipment on campus is the best way of ensuring this happens, you have the right to set this as a condition.

7.4 Institutions' responsibilities in managing complaints or appeals

Any student or parent who is unhappy with how an institution has managed their application for bursary funding or the support that has been provided, should follow the institution's own complaints procedure.

You should manage the escalation of complaints about the Bursary Fund in the same way as any other complaint you may receive.

We do not have a role in the administration of bursary funding to students because this is the responsibility of individual institutions. As such, we do not usually get involved with complaints and you should not routinely advise students or parents to contact ESFA. We may get involved if there is an allegation that the Bursary Fund eligibility criteria or any content within this guide is being disregarded.

8. 16 to 19 Bursary Fund and receiving DWP benefits

You may wish to highlight to students and parents the impact of receiving the 16 to 19 Bursary Fund on other benefits.

Receiving bursary funding does not affect receiving other means-tested benefits paid to families, such as IS, Jobseeker's Allowance, Child Benefit,

Working Tax Credit, Housing Benefit or, generally, UC (the [UC section](#) of this guidance contains more detail).

If a student is receiving DLA (or PIP) and ESA, parents can no longer receive certain household/family benefits for that child, such as child benefit.

16 to 19 Bursary Fund payments to students are not taken into account, in other words, they are not treated as income, in the calculation of UC for students who are claiming UC in their own right, under [regulation 68\(7\) of The Universal Credit Regulations 2013](#) (<https://www.legislation.gov.uk/ukxi/2013/376/regulation/68>).

In addition, it is only income that is received by the claimant/partner which is considered when determining an award of UC, as provided under section 5 of Welfare Reform Act 2012. Any earnings/income received by a student in further education aged 16 to 19 living with a UC claimant and/or their partner is ignored.

For 16 to 24 year olds with an EHC plan, for UC purposes Bursary Fund payments will still be disregarded because the 16 to 19 Bursary Fund falls outside the definition of a 'grant' under [regulation 68\(7\) of The Universal Credit Regulations 2013](#) (<https://www.legislation.gov.uk/ukxi/2013/376/regulation/68>) by virtue of it being a scheme which is primarily to 'enable persons under the age of 21 to complete courses of education or training that are not advanced education'.

9. Funding and allocations: bursary for defined vulnerable groups

9.1 Drawing down funding for vulnerable groups

You should draw down funding for bursaries for vulnerable groups from the SBSS whenever you identify and verify new students who meet the criteria. You can submit as many funding claims as you need to throughout the academic year. You must ensure you have fully verified the student's eligibility and assessed their participation needs before submitting any funding claim. You should only draw down the amount of funding you need from SBSS – you should not draw down the full £1,200 if the student does not need that amount of funding.

You should not hold onto claims until the end of the academic year and submit them retrospectively for payment. Submitting funding claims regularly helps us

to monitor the number of eligible students and the funding that is required to support them. It also ensures you do not need to use your discretionary Bursary Fund allocations to make payments for bursaries for vulnerable groups.

You draw the funding down by completing and submitting a funding claim via the [SBSS online portal](https://studentbursary.education.gov.uk/w/webpage/1619bursary) (<https://studentbursary.education.gov.uk/w/webpage/1619bursary>).

The deadline for the submission of 2024 to 2025 academic year funding claims is 31 July 2025. The SBSS will not pay any claims submitted after this date.

The portal contains guidance about the submission of funding claims. If you need further help, you can contact the SBSS provider helpline on 0300 303 8610 or use the web chat facility which is available throughout the process.

You must retain a copy of the funding claims submitted to SBSS, and records of funding paid to students through the claims process. The portal is not intended to be a filing system for claims and you should ensure you keep your own records outside the portal for future audit. This includes local authorities that will receive payment for claims made by, or on behalf of, maintained schools.

9.2 Accessing the SBSS online portal for the first time

To receive funding from DfE and its associated bodies or agencies, you must provide information about banking and payments.

The information required includes an email address. The SBSS use this email address to create access details for the institution's administrator account in the online portal. When the main administrator account is created, an email containing a link to the portal is sent to the registered email address.

This is followed immediately by a second email containing a temporary password – this must be used when accessing the portal for the first time. The system will then automatically request that the user sets up a new password for future use.

Once the main administrator has access, they can then set up other users for their institution.

It is important that institutions make it clear to any staff who may be required to submit funding claims who their SBSS portal administrator is. Any individual who does not have access to the portal should contact their institution's main administrator to request it. They should not contact us or SBSS.

9.3 How the SBSS processes and pays funding claims

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

Once processed, a funding statement and remittance advice will be issued in the online portal to confirm payments. Payments will only be made to the institution's bank account we hold. No other bank account or method of payment is permitted.

It is important you keep your bank account and contact details up to date with us as any discrepancies will impact on payments. You can request a change to your bank account details via our [customer help centre](https://customerhelp.education.gov.uk/hc/en-gb) (<https://customerhelp.education.gov.uk/hc/en-gb>). You should send any queries about amending a bank account to dfestandingdata@education.gov.uk.

You should contact SBSS if you have any queries about completing funding claims or payments made to you by SBSS, if you cannot resolve these by using the information in the online portal. You should not contact ESFA.

All our funded institutions receiving a discretionary bursary allocation in the academic year can submit a funding claim for bursaries for vulnerable groups if they have eligible students that they assess need financial help. Payment will be dependent on whether an institution has signed and returned their ESFA funding contract.

If you are not receiving a discretionary bursary allocation in the academic year, you may submit a funding claim for bursaries for vulnerable groups if you have eligible students. However, SBSS will need to make further checks with us before you can submit a claim.

9.4 Funding claims for students placed in independent provision

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

The independent education institution is responsible for verifying that students meet the criteria for a bursary for vulnerable groups, including obtaining evidence and assessing their actual need for help. Once you are satisfied a student is eligible for support, you should contact the relevant local authority.

The local authority cannot submit a funding claim without formal confirmation of eligibility from the institution. You can provide confirmation by sending the local authority a copy of the evidence you have seen or by setting out in writing/by email to the local authority that you 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 funds are redirected to them as appropriate.

9.5 Recycling bursaries for vulnerable groups funding

You may accrue some unused funding for bursaries for vulnerable groups during the academic year. For example, if a student leaves their study programme early after only receiving part of their bursary, or you do not pay the full amount to a student because they did not meet the agreed conditions.

You are expected to recycle this funding and use it to offset funding claims for other eligible students until 30 April 2025. For example, if you have a newly identified student who meets the criteria for a bursary for vulnerable groups and you have assessed them as needing £1,000 of financial support, you may already have £700 that you claimed for a student who has now left. You should recycle the £700 for the new student, claiming only £300 from the SBSS to give the total amount of funding needed.

You can add any funding for bursaries for vulnerable groups you have claimed, but no longer need, for eligible students to your discretionary bursary allocation from 1 May 2025.

Institutions that have incorrectly claimed funding for bursaries for vulnerable groups (for example, submitting a funding claim without verifying a student met the criteria), should try to recycle the funding on subsequent claims. However, if you have no other students who are eligible for a bursary for vulnerable groups, the incorrectly claimed funds cannot be added to your discretionary bursary allocation because the claim was in error. Instead, you must contact SBSS to return the funds at: 1619bursary@studentbursary.education.gov.uk.

9.6 Submitting 'zero' funding claims

Where an institution holds enough funds to cover the costs of a bursary for a vulnerable group eligible student in full, we ask that you submit a funding claim form to the SBSS showing a zero amount.

Similarly, if an institution has decided that a young person is in one or more of the defined vulnerable groups but does not have any actual financial need, it is also helpful if you submit a funding claim form showing a zero amount. This helps give us information on the number of 16 to 19 students in education who are in each of the defined vulnerable groups.

10. Funding and allocations: discretionary bursaries

10.1 Allocations

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

If an institution operates from more than one location across England, or operates through subcontracts, we will make the allocation to the lead office for distribution to each site. You should ensure that students attending provision delivered by subcontractors or at different sites can 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 subcontractor to ensure students can access support.

The methodology for calculating discretionary bursary allocations has 2 elements:

- element 1: financial disadvantage
- element 2: a) student costs to support travel and b) industry placements

Both elements are based on analysis of 2022 to 2023 academic year data, to gauge the underlying student factors that inform an institution's 2024 to 2025 academic year discretionary bursary allocation.

The underlying requirement that institutions make awards based on students' financial needs to participate has not changed. However, to be clear, institutions' local bursary policies do not need to be split into these 2 elements, and they do not need to be referred to. These elements form part of the allocations methodology only. There is no ring fence between the elements and institutions can use the different elements flexibly to support students' needs up to their full allocation.

Element 1, disadvantage, is calculated based on students' home postcodes, matched against the [Index of Multiple Deprivation \(IMD\) 2019](#)

(<https://www.gov.uk/government/statistics/english-indices-of-deprivation-2019>). The IMD is a government index that uses statistics on education, crime, health, employment and income to determine how disadvantaged an area is. Financial disadvantage instance values are assigned to students living in the 27% most deprived areas of the country.

Element 2, student costs, is intended to provide a general indicator of the main costs faced by students:

- element 2a calculates an amount of funding for travel to support non-residential students whose home postcode is in the top 60% most deprived areas (based on IMD 2019). The calculation factors in both the rurality of the student's home postcode and distance between the student's home postcode and the delivery location of their learning
- element 2b considers whether the student's industry placement through their participation on a T Level programme qualifies an institution for bursary funding. The calculation factors in whether a student's home postcode is in the top 60% most deprived areas (based on IMD 2019). Only institutions approved to deliver T Levels (up to and including wave 5) in the 2024 to 2025 academic year are in scope for this funding

The [explanatory notes \(https://www.gov.uk/government/publications/16-to-19-funding-allocations-supporting-documents-for-2024-to-2025\)](https://www.gov.uk/government/publications/16-to-19-funding-allocations-supporting-documents-for-2024-to-2025) that are issued with funding allocations set out the calculation in full.

In a small number of instances, a 'by exception' process will be used. For example, the application of averages may be used where there is no end of year data available. This will be made clear to any institutions affected.

10.2 Payments

Discretionary bursary allocations are paid in 2 parts: two-thirds in August 2024, one-third in April 2025. The first payment for academies is September, in line with general academy payment schedules.

10.3 Converter 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). We will make subsequent bursary payments directly to the academy.

10.4 Maintained schools

We make 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.

10.5 Maintained special schools

Local authorities will receive discretionary bursary funding to support students at maintained special schools. This bursary funding is aggregated and paid as a single allocation to each local authority. The discretionary bursary allocation methodology is applied to the number of students recorded in the 2022 to 2023 autumn census return and will require the use of calculations based on averages. As this is a single allocation, local authorities are asked to distribute this bursary funding across all their maintained special schools, according to need, using their own local knowledge and judgement.

10.6 New institutions

We will make discretionary bursary funding available to institutions that start delivering eligible education and training for us for the first time in the 2024 to 2025 academic year. This could be during or after the initial 2024 to 2025 allocations round. These allocations will require the use of calculations based on averages.

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

10.7 Administration contribution

You are permitted to use up to 5% of your 2024 to 2025 academic year discretionary bursary allocation for administrative costs relating to the 16 to 19 Bursary Fund. Institutions that receive both a 16 to 19 Bursary Fund and free meals in further education allocation are permitted to use up to 5% of the combined allocation for that year for administration. You must ensure you do not take a sum that is greater than 5% of the single allocation total you receive for the academic year.

11. Rules for returning unspent bursary funds

We permit you to carry unspent bursary funds over to the next academic year. You must continue to use any funds carried forward to support students in line with the funding rules in this guide. You cannot add the funds to general institution funds.

When you are given a single overall allocation that includes funding for both free meals and the bursary fund, you can carry forward funds from both schemes. You may use this funding for either free meals or Bursary Fund payments in the new academic year.

You cannot carry forward funding for the Bursary Fund and/or free meals funding for more than one year. This means you must return unspent funds before, and including, the 2022 to 2023 academic year or any funds that are over your current year allocation value. Below is an example of how you can calculate your returned unspent funds.

11.1 Example: Calculating unspent funds to be returned

Bursary funding for the 2023 to 2024 year	£400,000
<hr/>	
Bursary funding carried forward at year end 2023 to 2024	£600,000
<hr/>	
Unspent funding to be returned	£200,000
<hr/>	

You must fully use any unspent funds for either discretionary bursary or free meals or return them, in line with the one-year rule.

You must inform us of the total amount of any unspent funds that you have not previously reported from any year up to and including the 2022 to 2023 academic year or any funds that are over your current year allocation value. You must report the unspent funding via our [customer help centre](https://customerhelp.education.gov.uk/hc/en-gb) (<https://customerhelp.education.gov.uk/hc/en-gb>). You must specify the amount of funding and the year or years it relates to. You should do this as soon as you are aware; however, you must report it no later than 31 March each year. We will recover all unspent funds.

16 to 19 Bursary Funds are subject to normal assurance arrangements for 16 to 19 education and training. Local authorities are also required, via the local authority section 151 grant return process, to confirm that they have used the funding we have paid to them for the purpose it was intended. The Bursary

Fund forms parts of this process. Any funding declared by local authorities as not being used for the purpose it was intended, or which cannot be properly accounted for, is also recovered.

12. In-year growth

16 to 19 Bursary Fund and free meals in further education allocations are linked to allocated student numbers in the individualised learner record (ILR) or census. This means an increased student number allocation resulting from the exceptional in-year growth for student numbers process may also result in increased bursary and/or free meals allocations.

In addition, we will release additional bursary funding outside the main growth process, where analysis of the data suggests that an increased student number could put an institution's bursary allocation under considerable pressure. Additional bursary funding will be awarded where student over-delivery is expected to be 25 or more above the number already allocated plus any exceptional in-year growth award.

As with all other strands of in-year growth, we make growth awards on the assumption that the in-year data used is materially accurate. If later data returns (usually the R14) show that the in-year data returns are inaccurate, we will recover some or all the bursary and/or free meals in further education growth award.

13. Data returns, including the ILR and school census

We remind you of the importance of completing the ILR or school census, as appropriate, to indicate the numbers of students receiving support from the 16 to 19 Bursary Fund. You should include any students eligible for the bursary for defined vulnerable groups but who do not require support. We may use the ILR data field or school census data to review your use of the bursary against the amount of allocated funding. More information about the ILR student support codes (LSR 55 and LSR 56 both relate to the bursary fund) can be found in the [ILR specification: 2024 to 2025 guidance \(https://guidance.submit-learner-data.service.gov.uk/24-25/ilr/overview\)](https://guidance.submit-learner-data.service.gov.uk/24-25/ilr/overview).

You must also ensure you complete the ILR or census fields to provide data on the number of students participating in industry placements.

In addition to the completion of the ILR or school census, DfE may undertake survey activity to monitor how effective the new allocations methodology is, providing information on how institutions are using the funding. Your co-operation in completing the survey is appreciated.

14. Audit, assurance and fraud

16 to 19 Bursary Funds are subject to normal assurance arrangements for 16 to 19 education and training. You must ensure you have appropriate processes in place to record bursary applications and expenditure at student level. This must include a breakdown of the value, purpose, type of cost, whether paid or not, and a brief justification for the decision.

For standard weekly costs like travel and food, it may not be practical to collect receipts for every transaction, so costs may be evidenced initially by receipts then paid after that linked to actual attendance. You must also be able to confirm, during any audit, the amount of any unspent funds that have been carried forward to the current academic year.

You must ensure you can evidence your application process, how the student was assessed as eligible, how you made the decision to award the specific amount of bursary based on actual financial need and the funds that you have issued to the student. Auditors will be looking for evidence that you have a clear bursary policy, have applied your Bursary Fund eligibility criteria correctly and used a consistent application and assessment process for all students.

You must retain copies of documents the student has signed to give formal agreement to their conditions for payment. This might include attendance, returning equipment at the end of their study programme or certain points in the year when they need to provide receipts for expenditure, for example.

You must retain hard or scanned copies of documentation to support eligibility and the funding claimed for 6 years (records can be kept electronically). This includes the application form, the household income evidence, evidence of the actual financial need being funded and the value.

Examples of documentation auditors expect to see include:

14.1 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 UC statement
- evidence of payments received from the SBSS, for example bank statements and remittance advices
- a copy of the student's individual assessment of actual financial need, including a breakdown of the calculation that has determined the amount required
- receipts for purchases or in-kind support provided to the student, for example, bus pass, lunch receipts or book receipts
- evidence to support the value of any cash payments made to the student such as travel pass, bus tickets or meal deals
- attendance evidence to support payments where applicable

14.2 For the discretionary bursary

- evidence used to assess eligibility and determine household income, such as P60s, self-employment accounts, wage slips, a letter from DWP, copies of online statements for UC
- a copy of the student's individual assessment of actual financial need, including a breakdown of the calculation that has determined the amount required
- receipts for purchases or in-kind support provided to the student, for example, bus/travel pass, travel tickets, lunch receipts or book receipts
- evidence to support the value of any cash payments made to the student such as travel pass, bus tickets or meal deals
- attendance evidence to support payments where applicable

Local authorities are also required, via the local authority section 151 officer grant return process, to confirm that they have used the funding we paid to them for the purpose it was intended. The 16 to 19 Bursary Fund forms part of this process. Any funding declared by local authorities as not being used for the purpose it was intended, or which cannot be properly accounted for, is recovered.

14.3 Common audit errors

Common errors identified at audit, which can lead to the recovery of funds, include:

- no clear Bursary Fund policy in place which explains, for example, the criteria the institution will use to assess students and how they will make decisions about the amount of support they award
- Bursary Fund application forms which are not fit for purpose because they do not capture all the necessary evidence to confirm the student's household income and the actual participation costs they have
- application forms not completed and signed by students each year to allow an assessment of their current financial needs to be made
- financial assessments not always being undertaken or undertaken based on partial/incomplete evidence
- making blanket or flat rate/fixed rate payments to students and payments not based on actual need for financial support or the types of costs they have. For example, a student has £7.50 of travel costs per week and no other defined costs but they are paid £20 per week
- using bursary funding to pay for foreign/overseas field trips where the content can be found in England at a cheaper cost and/or using bursary funding to support field trips that are not an essential part of achieving a student's study programme goals
- evidence to support household income not being retained

It is good practice to use an eligibility checklist to ensure a clear and complete Bursary Fund process is followed, in line with the funding rules set out in this guide. This guide includes a [checklist](https://www.gov.uk/government/publications/16-to-19-bursary-fund-guide-2024-to-2025-academic-year) (<https://www.gov.uk/government/publications/16-to-19-bursary-fund-guide-2024-to-2025-academic-year>) which you may wish to use.

This guide also includes a [summary](https://www.gov.uk/government/publications/16-to-19-bursary-fund-guide-2024-to-2025-academic-year) (<https://www.gov.uk/government/publications/16-to-19-bursary-fund-guide-2024-to-2025-academic-year>) which lists the most important things you need to consider when administering the 16 to 19 Bursary Fund, based on common errors and issues ESFA auditors have identified.

We will recover funds where auditors identify funding errors in any circumstances where you are not able to demonstrate at audit how your students meet the eligibility criteria of the bursary fund, where you do not have sufficient evidence to support payments made to students, and in any circumstances where you have claimed defined vulnerable group bursary payments for duplicate students.

We take any concerns relating to financial irregularity or impropriety seriously. We will investigate where we assess those concerns have been raised in good faith and there is sufficient evidence to warrant it. [Further guidance and contact details](https://www.gov.uk/government/organisations/department-for-education/about/complaints-procedure) (<https://www.gov.uk/government/organisations/department-for-education/about/complaints-procedure>) are available on GOV.UK.

You are responsible for investigating instances of fraud relating to Bursary Fund applications. If you find evidence that misleading or fraudulent information has

been knowingly submitted by a student or parent, resulting in the student receiving a bursary they were not entitled to, you should attempt to recover the overpayment from the student.

Institutions that identify significant fraud should report it to us. Significant fraud may involve 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

15. 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. You 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 \(https://www.gov.uk/government/publications/free-meals-in-further-education-funded-institutions-guide-2024-to-2025-academic-year\)](https://www.gov.uk/government/publications/free-meals-in-further-education-funded-institutions-guide-2024-to-2025-academic-year).

Before the introduction of additional funding for free meals, institutions had supported the cost of meals for students who needed them from discretionary bursaries. For the 2024 to 2025 academic year, we will continue to adjust discretionary allocations to take account of this double funding for those institutions also receiving an allocation for free meals.

Where students are eligible for a free meal, you should ensure you consider the provision of a free meal, or the funding provided to the student for the free meal, when you assess their overall need for support, whether from the discretionary bursary or bursaries for vulnerable groups to prevent double funding.

16. Other useful information

This section provides information on specific groups of students to help inform your eligibility decisions.

16.1 Industry placements

A few students may find themselves facing financial difficulties due to incurring extra participation costs, for example because they need to pay for additional travel to their placement. These students may only need support for a brief period.

16.2 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

You should provide in-kind support to young offenders rather than cash wherever possible.

16.3 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 \(EMA\)](https://www.mygov.scot/ema/?via=http://www.emascotland.com/) (<https://www.mygov.scot/ema/?via=http://www.emascotland.com/>). These students are not eligible to apply for support from the 16 to 19 Bursary Fund.

If a student lives in England and travels to study at a Scottish institution, they should approach their home local authority in England to make an application for a discretionary or vulnerable group bursary. These students are not eligible for Scottish EMA.

16.4 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 \(https://www.studentfinancewales.co.uk/fe/ema.aspx\)](https://www.studentfinancewales.co.uk/fe/ema.aspx).

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. You should consider any support the student is receiving from Wales before making any bursary award.

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

17. Good practice

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

17.1 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 their website and in their prospectus, as well as on posters that are on display around the college throughout the year. The college distributes information at open evenings for year 11 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 raises awareness about the 16 to 19 Bursary Fund by providing information to prospective students before enrolment at open evenings, talks at schools and so on. Any young person who attends a pre-enrolment interview gets a card with brief information on the bursary and pointers directing them to full information on the college's website. In addition, social workers who work with the most disadvantaged young people help the

college 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

17.2 Identifying students eligible for bursaries for vulnerable groups

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

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

- in one area, institutions include information on the 16 to 19 Bursary Fund in a bulletin to social worker contacts. This is published 3 times a year, and ensures contacts are updated about the bursary
- another college's inclusion manager, who has developed links with local agencies working with vulnerable young people (YMCA, Social Services and Youth Offending teams), identifies young people who might need support. This helps the college identify young people likely to be in need before enrolment. They then assist in completing the application process if appropriate
- one college promotes the bursary 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

17.3 Identifying students who may need support from the discretionary bursary

DfE recognises that it can be difficult for you to identify which students may need help from the discretionary bursary if they do not proactively ask for support. General further education colleges, sixth-form colleges, school sixth forms, 16 to 19 academies and special post-16 institutions can access Get Information about Pupils (GIAP) through your DfE sign-in account which may

help identify students you could proactively approach to see if they require support.

You must not use this information to guarantee support or to offer blanket support to students. However, it could be a helpful source of information for you to use to identify students you could proactively approach to see if financial support is required (subject to the usual assessment of individual need).

17.4 Young people with caring responsibilities

Young people with caring responsibilities, for example those caring for a parent or other relative, may be reluctant to say so because of fear of being stigmatised. You should ensure confidentiality to reduce these concerns, publicise the availability of help from the Bursary Fund and encourage young carers to apply where they have a financial need.

When assessing young carers' eligibility for support from the bursary, you 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.

17.5 Working with other organisations

You are encouraged to work with other local institutions and the local authority to agree a common approach to the 16 to 19 Bursary Fund. This could include you 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.

17.6 Paying bursary funding to students

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

Some examples of different payment approaches used by institutions are:

- one institution involves carers and social workers in establishing the most appropriate way of getting the funding to the young person. At the beginning of term, if the student needs specialist equipment and/or a travel pass, the college purchases this and deducts the cost from the student's overall award. In cases where a carer has responsibility for the young person's finances, the institution sets up meetings with them to decide how payments should be made
- in another institution, a financial support advisor interviews students to decide together on the best way to deliver his or her support. They address priority areas first: travel to college, equipment costs and support with studies. They also discuss additional expenditure, such as university visits
- one institution pays students a greater amount of funding at the start of their course so they can pay for equipment and course-related items. Students use travel vouchers to pay for bus fares. The student services team meet with the students regularly to help them with budgeting

18. Further information

These funding rules should provide the information you need to administer the bursary and should be consulted before contacting us. If you have questions after reading our guidance, or if there's anything else you need help with, you can find more support in our [customer help centre](https://customerhelp.education.gov.uk/hc/en-gb) (<https://customerhelp.education.gov.uk/hc/en-gb>).

If you have any questions about completing the bursary for vulnerable groups funding claim or about bursary for vulnerable groups payments made by the SBSS, you should contact SBSS on [0300 303 8610](tel:03003038610) or by using the SBSS web chat facility or by emailing 1619bursary@studentbursary.education.gov.uk.

We cannot answer questions about funding claims submitted to, or paid by, SBSS and you must contact SBSS directly if you have any queries or questions about claims and/or payments. We will direct any institution that contacts us about this aspect of the process to SBSS.

OGI

All content is available under the Open Government Licence v3.0,
except where otherwise stated

© Crown copyright