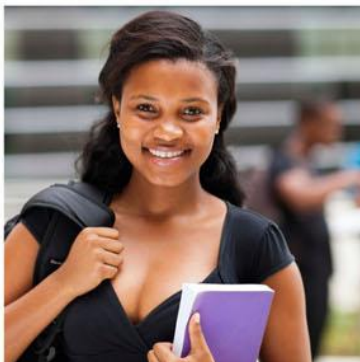


# Student Services Annual Report 2014/15



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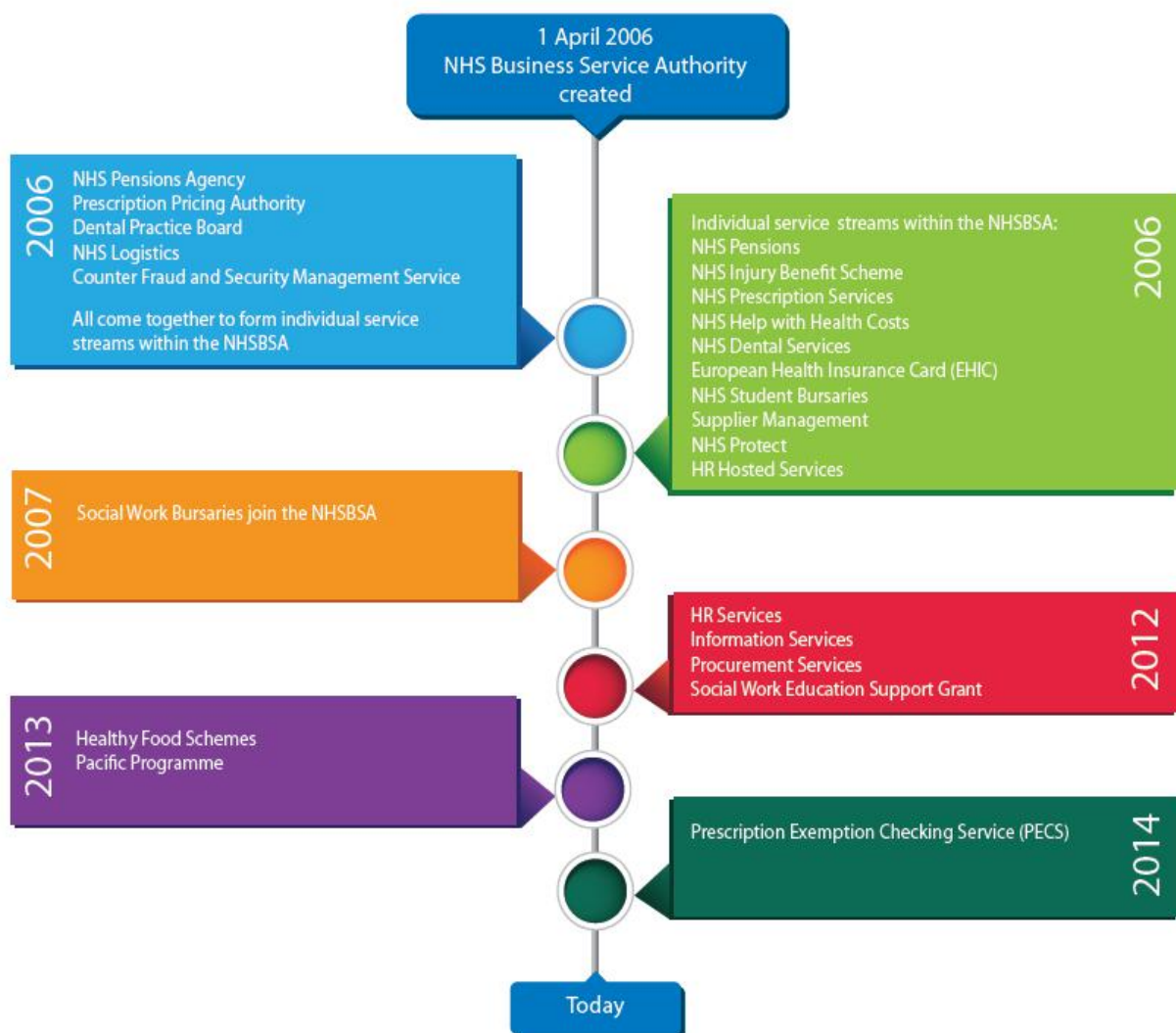
Our aim is:

***'to ensure our customers are paid correctly and on time, every time'***

# 1. General Overview and Introduction

The NHS Business Services Authority (NHSBSA) is a Special Health Authority and an Arm's Length Body of the Department of Health (DH). It provides a range of critical services to NHS organisations, NHS contractors, patients and the public. The core functions have grown since the NHSBSA was created in 2006, and the current portfolio of service provision is shown in the figure below.

One of our significant achievements in Student Services in 2014/15 was the introduction of the Childcare Allowance reconciliation process. We are on target to realise £3-5 million savings by ensuring students are receiving their correct Childcare Allowance entitlement.



The corporate strategy and business plan can be accessed [here](#).

## Student Services

There are three key service streams within Student Services:

NHS Student Bursaries	Social Work Bursaries	Education Support Grant
Assessing and paying bursaries totalling approximately £430 million to around 80,000 health students in any one academic year and over 80 Higher Education Institutions.	Assessing and paying bursaries totalling approximately £59 million to around 11,000 social work students.	Making payments of around £22 million for social work placements to over 80 Higher Education Institutions.

Student Services are provided from various NHSBSA sites:

- Hesketh House, Fleetwood - NHS Student Bursaries, Communications and the hub for Student Services
- Ridgway House, Bolton - NHS Student Bursaries Scanning Services
- Bridge House, Newcastle - Social Work Bursaries, Education Support Grant and Customer Contact Services
- Stella House, Newcastle - Programme Management, Finance, Information Technology and other corporate functions

Across the three service streams, we administer payments totalling approximately £511 million to around 91,000 students and over 80 Higher Education Institutions.

Our overarching aims include:

- Providing a modern, timely and reliable service for **customers**
- Exceeding **client** expectations through effective and assured service and policy delivery
- Supporting our **staff** to have job satisfaction and rewarding careers
- Enabling our **organisational** objectives to be achieved

### NHS Student Bursaries

The NHSBSA is directed by the Department of Health to administer NHS Bursaries <https://www.gov.uk/government/publications/nhs-bursary-scheme-rules>. The policy sets out the scheme rules and administrative arrangements for the payment of NHS Bursaries to students who meet the eligibility requirements and have accepted a place on an eligible course. The NHS Bursary Scheme rules ensure the bursaries are paid fairly and consistently.

There are two sets of rules, one for students who started their course before 1 September 2012 (which incorporates the pre-2007 scheme rules) and one for those who started on or after that date. The NHS Bursary Scheme covers bursary awards for:

<b>Undergraduate and postgraduate students:</b>	
Tuition Fee Contributions (medical and dental students only)	
Maintenance Award:	
<b>A. <u>Non Means Tested Allowances:</u></b> <ul style="list-style-type: none"> <li>• Non Means Tested Grant</li> <li>• Disabled Students Allowance</li> <li>• Practice Placement Expenses</li> </ul>	<b>B. <u>Means Tested Allowances:</u></b> <ul style="list-style-type: none"> <li>• Means Tested Bursary (Basic Allowance/Award)</li> <li>• Extra Weeks Allowance</li> <li>• Dependants Allowance/Parent Learning Allowance</li> <li>• Childcare Allowance</li> </ul>

NHS Student Bursaries (SB) processes approximately 80,000 applications per academic year for healthcare students at over 80 Higher Education Institutions (HEIs). In respect of medical and dental students, SB also pays tuition fees to HEIs. The total financial value of SB activity is around £430 million. The funding paid to students and HEIs is accountable to Health Education England which is responsible for management of the associated education commissioning activity through contracts with the HEIs. The NHS Bursary rates applicable during 2014/15 are detailed in Appendix 1 and the eligible professions are listed in Appendix 2.

### **Social Work Bursaries**

The NHSBSA is directed by the Department of Health to administer Social Work Bursaries (SWB) <https://www.gov.uk/social-work-bursaries/overview> and the Education Support Grant (SWESG). Accountability for these two service streams is directly to the Department of Health. The Social Work Bursary Scheme covers bursary awards for:

<b>Postgraduate students:</b>	
<b>A. <u>Non means tested assistance:</u></b> <ul style="list-style-type: none"> <li>• Basic Grant (including Placement Travel Allowance)</li> <li>• Disabled Students Allowances</li> <li>• Tuition Fee Contributions</li> </ul>	<b>B. <u>Means tested assistance:</u></b> <ul style="list-style-type: none"> <li>• Maintenance Grant</li> <li>• Childcare Allowance</li> <li>• Adult Dependants Allowance</li> <li>• Parents' Learning Allowance</li> </ul>
<b>Undergraduate students:</b>	
<ul style="list-style-type: none"> <li>• Basic Grant (including Placement Travel Allowance)</li> <li>• Placement Travel Allowance (for eligible students who fall outside of capping numbers)</li> </ul>	

SWB process approximately 11,000 applications and 3,090 tuition fee invoices per annum for social work students at over 80 Higher Education Institutions (HEIs). The total financial value of SWB activity is around £59 million per annum and the Education Support Grant around £22 million per annum. The SWB rates applicable during 2014/15 are detailed in Appendix 3.

### **Education Support Grant**

Education Support Grant (ESG) is paid to HEIs to help fund social work placements and also a contribution to the costs of involving service users and carers in the development and delivery of social work education programmes. The ESG rates are detailed in Appendix 4.

### **Operational Structure and Processes**

The senior management structure for the Operations Directorate is detailed in Appendix 5 and the Student Services organisation chart is detailed in Appendix 6. Appendix 7 provides service overviews for NHS Student Bursaries, Social Work Bursaries and the Education Support Grant.

### **Policy Changes 2014/15**

#### **NHS Student Bursaries**

The NHS Bursary Scheme New Rules apply to students starting on their courses on or after 1 September 2012. The 3<sup>rd</sup> edition includes a number of changes from the 2<sup>nd</sup> edition of the NHS Bursary Scheme Rules. The same changes also apply to the 15<sup>th</sup> edition of the NHS Bursary Scheme Old rules.

- References to the 4 year graduate entry courses changed to reflect the changes to the graduate entry programmes of study.
- The tuition fee rate for medical and dental students studying in Northern Ireland increased by 3.1% from £3,465 to £3,686.
- Bursary rates increased by 1%.
- All allowances increased by 1%.
- Disabled Students Allowances increased by 1%.
- Pedal cycle, motor vehicle up to 125cc, other motor vehicle and additional passenger rates all increased in line with Agenda for Change rates.
- Made clearer that the calculation of additional eligible weeks over 30 weeks and 3 days is rounded up.
- Made clearer that Extra Weeks Allowance calculation is based on eligible weeks.

- Paragraph added to explain how a parent(s) contribution should be split if they are in receipt of publicly funded student support or they provide contribution to another child or children who is/are in receipt of publicly funded student support.
- Reference to 'academic year' has been changed to 'last UK tax year'.
- Clearer definition of child maintenance payments.
- Definition of 'academic year' amended to say that it is the period of 12 months starting from the first date from which the course runs.
- 6 months deadline for bursary applications introduced with the 6 months starting from the first month of the academic year.
- Clearer that a student can be classed as independent in instances where the most appropriate parent has passed away.
- Clarity in which year the income is being assessed.
- Additional information added to allow specific expenses to be deducted from a dependant's income.
- A number of definitions added to the glossary.
- A number of text changes made through out.

### **Social Work Bursaries**

For 2014/15 changes were made to individual HEIs' bursary allocations following a data collection exercise and correspondence with the Department of Health.

The allocation formula was reviewed by the Social Work Bursary Advisory Group. The formula for 2014/15 year for postgraduates uses student intake data as opposed to numbers of bursary recipients.

A summary of the bursary arrangements for the 2014/15 academic year is detailed below:

- DH sets the national number of undergraduate and postgraduate social work bursaries (based on funding available) and the Social Work Bursary Advisory Group advised on the distribution of the national numbers.
- HEIs decide on which students to shortlist for a bursary.
- Shortlisted students apply to the NHSBSA for a bursary.
- Undergraduates may also be eligible for a student loan, subject to eligibility criteria.
- Undergraduate and postgraduate students who do not receive a bursary will receive a Placement Travel Allowance (PTA).
- Eligible students who started their courses pre-2013 academic year will continue to receive a bursary until they complete their course or their circumstances change such that they are no longer eligible for a bursary.



- Where a student receiving a bursary under pre-2013 rules differ from their course, on their return to study they will be eligible (subject to meeting the criteria) for a continuation of their bursary allocation in addition to the capped number of bursaries.

The postgraduate means tested bursary, allowances and Disabled Student Allowances rates were all increased by 1%.

There were no changes to the bursary rates for undergraduate courses that started before the 2013 academic year and for courses starting on or after 1 September 2013 the bursary rates were set at £5,262.50 and £4,862.50 for London and outside of London respectively.

### **Education Support Grant**

Following the published consultation document on the future of ESG in December 2013 and in line with the interim arrangements outlined in the consultation response, the NHSBSA implemented a temporary fee structure for 2014/15.

The interim arrangements do not meet the policy objective of ending demand led funding. The funding required is still related to the number of students. However, control over budget has been achieved through setting of fees to fit within overall budget.

Work is continuing with the social care sector on introducing new arrangements that are consistent with reviews of social work education from the 2015/16 academic year. This is to be informed by a number of changes currently being undertaken in the field of social work education:

- Reforms to the social work bursary and higher education funding.
- HEIs are currently implementing the SWB reforms of qualifying education.
- The Health and Care Professions Council (HCPC) is currently undertaking a re-approval process of social work qualifying courses.
- The College of Social Work has introduced a voluntary endorsement scheme.
- The Department for Education is continuing the Step-Up programme and introducing Frontline.
- The Department of Health is introducing the Think Ahead programme for the 2016 academic year.
- The Department of Health and Department for Education will be issuing calls for expressions of interest in becoming an early adopter of Teaching Partnerships.

## 2. Performance Report

Overall, Student Services has delivered good performance against Key Performance Indicators (KPIs) throughout 2014/15.

Copies of the March 2015 sponsor reports have already been provided to clients, but are also available on request.

### NHS Student Bursaries

There are a few isolated incidences of failure to meet KPIs all of which have been addressed and are being monitored to prevent further service failures:

- 3 Disabled Students Allowance (DSA) payments were made out of KPI target
- Absolute Cash Variance due to failings in June, November, February and March, which related to single high cost error values in each respective month
- Student Bursary calls – this is as a result of significant increases in customer calls due to the NHS Pensions reforms.
- A small number of complaints as a result of being scanned with other documentation, where the KPIs differ

### Social Work Bursaries

Overall the KPIs have been met with only two incidences of failure:

- A single payment deadline was missed due to being logged incorrectly as a January start when the customer commenced training in the September cohort
- SWB calls- this is as a result of significant increases in customer calls due to the NHS Pensions reforms.

### Education Support Grant

All KPIs were delivered on target during 2014/15.

### 3. Quality Improvements

Improving services for our customers and clients remains at the heart of Student Services. 2014/15 has seen further quality improvements as detailed in the following sections.

#### NHS Student Bursaries

Through the continuous service improvement programme, a significant number of quality improvement initiatives have been implemented or are currently in progress. The following provides a high level of summary:

<b>Process overview</b>	<ul style="list-style-type: none"> <li>Revised BUR process (student withdrawal notification)</li> <li>Status update emails</li> </ul>
<b>System changes</b>	<ul style="list-style-type: none"> <li>Meridio re-mapping (part of the Bursary Online Support System- BOSS)</li> <li>COSA update (Confirmation of Student Attendance)</li> <li>System amendments for scheme rule changes</li> <li>Numerous text changes</li> </ul>
<b>Customer calls</b>	<ul style="list-style-type: none"> <li>Promotion of self-service</li> <li>Customer 'Ask Us' facility placed on all web portals</li> </ul>
<b>Childcare</b>	<ul style="list-style-type: none"> <li>Implemented reconciliation process</li> <li>Re-written Childcare Booklet</li> <li>Developed new FAQs</li> <li>Developed a comprehensive communications plan</li> </ul>
<b>Disabled Students Allowance</b>	<ul style="list-style-type: none"> <li>Developed a working relationship with BIS and DSA-QAG (Quality Assurance Group)</li> <li>Drafted a Guidance Booklet</li> </ul>
<b>Fraud, Error and Debt</b>	<ul style="list-style-type: none"> <li>FrED action plan updated and presented to Audit Committee</li> <li>HEI withdrawal dates being actively monitored</li> <li>Analysis by profession of course duration</li> </ul>
<b>HEI interactions</b>	<ul style="list-style-type: none"> <li>Developed a Medical &amp; Dental Administrators Guide</li> <li>Developed a PPE Guide for HEIs and students</li> <li>Undertaken further revision of all HEI forms</li> <li>Hosted individual HEI Working Groups</li> <li>Provided HEIs with application window posters</li> <li>Launched a Twitter page</li> </ul>
<b>Internal knowledge base</b>	<ul style="list-style-type: none"> <li>Further development to internal knowledge base system with an increase in the number of articles</li> </ul>
<b>Website</b>	<ul style="list-style-type: none"> <li>Updated the bursary calculators</li> <li>Launched a stakeholder toolkit</li> <li>Overall general site refresh</li> <li>Introduced clickable icons for Facebook, Twitter and Ask Us on every web page</li> </ul>

## Social Work Bursaries

As part of our continuous service improvement programme and also as a result of recent policy change, the SWB team have introduced a number of quality improvements as follows:

<b>Process Overview</b>	<ul style="list-style-type: none"> <li>Revised capping process timescales after gaining feedback from universities regarding difficulty in them providing information within the original timescales</li> <li>Implemented new manual workaround for students that have completed their degree programme and are embarking on a MA programme (referred to as end - on) after BIS rate change</li> </ul>
<b>Metrics</b>	<ul style="list-style-type: none"> <li>MI reporting improvements</li> </ul>
<b>Customer calls</b>	<ul style="list-style-type: none"> <li>Root cause analysis of call volumes and reasons and more reason codes added to make information more meaningful</li> <li>Implemented process for updating payment and capping receipt information via Facebook</li> <li>Facebook information remains proactive and timely</li> </ul>
<b>Disabled Students Allowance</b>	<ul style="list-style-type: none"> <li>DSA guide published</li> </ul>
<b>Fraud, Error and Debt</b>	<ul style="list-style-type: none"> <li>Strategy in progress</li> <li>Fraud awareness update sessions delivered to staff</li> </ul>
<b>HEI interactions</b>	<ul style="list-style-type: none"> <li>Updated HEI contact lists, including specific contacts to ensure correct person each time</li> <li>Redesigned capping spreadsheets giving individual capping numbers making them easier for universities to use</li> <li>Updated timescales for receipt of capping information after gaining university feedback</li> <li>Included in Bursary News</li> </ul>
<b>Internal knowledge base</b>	<ul style="list-style-type: none"> <li>Sherlock knowledge base regularly reviewed, audited and updated</li> </ul>
<b>Website</b>	<ul style="list-style-type: none"> <li>Website updated with stakeholder toolkit to keep all the information for HE, FE and colleges in one place</li> <li>Introduced clickable icons for Facebook, Twitter and Ask Us on every web page</li> <li>Ask Us regularly reviewed, audited and updated</li> <li>Booklet launched</li> </ul>

## **Education Support Grant**

The team worked with universities to help them understand the new process of claiming Skills Days. After speaking to universities the information booklet was updated to make the process easier to understand.

Following an audit recommendation, an online survey was issued to students to establish that the information provided by their universities for placements was accurate. The response rate from students was higher than expected with over 1,200 completing the survey compared to just over 500 responses from the year before.

The results confirmed the accuracy of the universities' information.

## 4. Client & Stakeholder Engagement

Engagement with clients and stakeholders is central to ensuring we deliver service excellence to our customers and clients and to help our clients meet their objectives and those of the wider public sector, by using our knowledge, experience and insight. Engagement is delivered through both formal and informal means and often through day-to-day communications, the extent of which is not measurable.

The chart below provides an overview of formal client and stakeholder engagement activity undertaken during 2014/15.



For 2015/16 we have further plans to develop client and stakeholder engagement including:

- Further Special Interest Groups, such as Medical and Dental and SWB to meet the demand of the customer
- Local events for Health Education England, the Local Education and Training Boards and associated HEIs
- Further engagement with NHS Careers and Student Loans Company to explore collaborative working opportunities

We are also actively engaged in the NHS Bursary allowances review as led by DH.

## 5. Customer Satisfaction

The customer satisfaction surveys have already been provided to clients, and copies are available on request. Below are the summary findings for NHS Student Bursaries and Social Work Bursaries.

### NHS Student Bursaries

Key findings:

- University/Higher Education Institution is the main way students find out about Student Bursaries and the website is the main source for finding out more information.
- Overall respondents are more positive about the application process through BOSS than in 2013.
- Satisfaction with the Student Bursary award aspects are consistent with 2013, although timeliness of award notification has significantly increased.
- Customer Contact is rated highly, with all satisfaction measures that can be compared being significantly higher than in 2013.
- The website receives green ratings with the exception of the ease of finding information.
- 34% of students are aware of Ask Us, but only 7% have used it.
- Satisfaction with communication is significantly higher than 2013.
- Overall satisfaction has significantly increased and has returned to a green rating. Although fourth year + students are less satisfied overall.

Recommendations:

- Continue to raise awareness of the Guide to NHS Student Bursaries booklet and the process for Practice Placement Expenses (prior to application).
- Simplify the application form and provide clear guidance with more examples.
- Improve the layout of the website so that information is easier to find.
- Clarify evidence that will be required at the outset of the application process.
- The process for providing supporting evidence could be less onerous, particularly for subsequent years.
- Provide regular progress updates and reminders at key times during the application cycle.
- Explore relatively low satisfaction with the application process, communication and service in general amongst fourth year + students and students limited by health problem or disability.



## Social Work Bursaries

### Key findings:

- University/college remains the main way students find out about Social Work Bursaries and the website is the main source for finding out more information.
- Ease of finding out about Social Work Bursaries has significantly declined from the previous year, with respondents being least well informed about other allowances.
- Satisfaction with most of the application process has fallen, significantly for most measures, with students being most dissatisfied with timeliness of notification.
- Mean satisfaction ratings are green for all elements of the customer contact and are comparable to 2013, with significant increases for time taken to answer call/ acknowledge query and staff ability to resolve query.
- The website aspects receive green ratings with the exception of ease of finding information.
- There has been a significant improvement in the satisfaction with communication from Social Work Bursaries.
- Overall satisfaction is comparable to 2013.

### Recommendations:

- Increase in awareness of Social Work Bursaries prior to students applying for their course and clarify the eligibility criteria and entitlement calculation.
- Explore whether Social Work Bursary application can be available to complete online, simplifying the form and providing additional instructions and guidance on its completion.
- Review the process for allocating bursaries as for some the current process of finding out after you have started the course is stressful. Communicate regularly with students, particularly by email, providing updates on the progress of applications, expected timeframes and payment dates.
- Improve the layout of the website so that information is easier to find.

## 6. Activity

The following sections provide a detailed account of activity across the service streams for the 2014/15 financial year. Student Bursaries supports around 80,000 students in training in any one academic year. However, across the financial year the number of students supported is in excess of 100,000. This is due to the cross over between the financial year and academic year, where essentially four cohorts of students are in our systems.

### NHS Student Bursaries

In the financial year 2014/15 SB assessed awards and paid bursaries under the provisions of three different NHS Bursary Schemes depending on the start date of the student's course. For the purposes of this report these are the Pre-2007 Scheme, the 2007-2012 Scheme and the 2012 Scheme, and details of the rates payable under each scheme are given at Appendix 1, Tables 1A and 1B.

In total SB made a payment to 100,097 students in the financial year. Of these:

- 112 (0.11%) fell under the Pre-2007 Scheme
- 27,577 (27.55%) fell under the 2007-2012 Scheme
- 72,408 (72.34%) fell under the 2012 Scheme

Under the 2007-2012 Scheme, introduced from 1 September 2007, there were two distinct groups of students, namely 'Traditional Diploma' and 'Mainstream' as detailed in the 13<sup>th</sup> & 14<sup>th</sup> Editions of the NHS Bursary Scheme 'Old Rules'. 'Traditional Diploma' was the term applied to students training for a diploma in nursing, midwifery or operating department practice and who were eligible for a non means tested basic award. 'Mainstream' students covered all other trainee health professionals for whom most bursary elements were means tested.

The 2012 Scheme which was introduced from 1 September 2012 followed the Review of NHS Student Support which concluded in 2011. The main differences between the provisions of the 2012 Scheme, as detailed in the 1st Edition of The Bursary Scheme New Rules and the two earlier schemes are:

- Changes to the rules concerning personal eligibility
- Removal of Audiology from the list of qualifying health professional courses
- Removal of the distinction between 'Traditional Diploma' students and 'Mainstream' students with a consequent extension in the availability of a means tested, as opposed to a non means tested, bursary and the Extra Weeks Allowance to all eligible students

- Introduction of a £1,000 non means tested grant for all students eligible for a full bursary
- Changes to the rules regarding the reimbursement of Practice Placement Expenses

The above should be taken into account if comparing the information in this report with that for previous financial years.

Appendix 8 gives the gross amount of bursary paid by profession and professional group in the financial year (excluding tuition fees), and figures for the number of students paid in the financial year. These are not a count of NHS Bursary holders as nil award holders (those students who opted not to disclose income or whose award has been fully abated after means testing) are excluded. Figures exclude tuition fees paid directly to Higher Education Institutions in respect of students studying Medicine or Dentistry. Figures may also be distorted due to the financial year straddling the two academic years 2013/14 and 2014/15.

Appendix 9 provides the gross amount of bursary paid by award element in the financial year. Appendix 10 provides a 10-year summary by Profession. Appendix 11 provides a 10 year summary by award element.

In the financial year, cash payments totalled £430.3 million of which £153.8 million (36%) was made in respect of the Basic Award. Figures in the tables are split between award elements normally paid monthly and those payment transactions made as one-off payments. As the award elements payable to a student are dependent on the bursary scheme rules pertaining to an award, due regard should be made to the table footnotes. Appendix 12 provides details of the total applications received during 2014/15 and Appendix 13 provides a summary of all key work items processed in year.

A mandatory equal opportunities monitoring form is included in the BOSS application. The information is compiled anonymously and is included at Appendix 14. Although the form is mandatory, students have the option not to disclose the information being asked under each question.

### **Social Work Bursaries**

The application window for social work bursary runs from 1 May to 30 November each year, with a delayed deadline of 14 February for January starters.

The majority of bursary applications are received prior to September courses starting and therefore May through to the end of August are the busiest assessing period for the team. Childcare Allowance and Disabled Student Allowance applications can be received at any time throughout the year, but the majority also tend to be submitted

prior to September. Appendix 15 provides a breakdown of applications received in 2014/15 clearly showing the seasonality of the work.

Appendix 16 highlights the number of queries from SWB customers dealt with by the SWB team and the Contact Centre during 2013/14. Again, the work profile of queries mirrors the seasonality of the application process with most activity occurring over the summer and autumn.

An equal opportunities monitoring form is included in bursary application forms, and students are given the opportunity to complete and submit this. The information is compiled anonymously and is included at Appendix 17. Below is a summary of a high level analysis:

- Of the 9,305 bursary applications received, 6,866 contained completed equal opportunities monitoring forms
- Of these, 6,287 stated that they wished to declare information
- Of these, 579 did not wish to declare information

Not all students choose to complete the equal opportunities monitoring form and therefore the information gathered does not represent the full population of students each year. In order to gain a more complete demographic of our customers, we can interrogate the FEAST database for information on age, gender, academic level and year of study. This information is included in Appendix 18

### **Education Support Grant**

During 2014/15, the NHSBSA made payments to over 80 HEIs covering approximately 967,000 placement days and 91,200 skill development days.

## 7. Income and Expenditure

### NHS Student Bursaries

The final draft of the 2014/15 national operational NHS Bursary expenditure forecast amounted to £429.5m. The final outturn was 0.14% higher at £430.1m.

Budget forecasts were produced incorporating the following general factors:

- The forecasts are based on SB approved payment data
- Adjustments have been made by SB for actual and projected in year activity changes relating to student withdrawals and students resuming training based on previous and current year records
- Information received from HEIs regarding courses commissioned
- Projections using average bursary costs in the current year applicable to individual HEIs and courses

### Social Work Bursaries

Total Social Work Bursary expenditure in the 2014/15 financial year was £59.3m; the detail for which is provided in Appendix 19. Expenditure is now tightly controlled as all cohorts (both at postgraduate and undergraduate level) are now subject to capping criteria. Means tested elements of the bursary will remain demand-led to a certain extent, and in 2014/15 the allowances only had a small increase in line with usual inflation levels.

### Education Support Grant

Total ESG expenditure in the 2014/15 financial year was £21.7m and Appendix 20 provides a breakdown. ESG has expenditure reduced in 2014/15 compared to 2013/14 as a large number of universities are not taking up the Study Skills places. This may increase next year due to the increased knowledge of these payments being available.

ESG is paid to HEIs in two instalments within the academic year, around Dec/Jan and June/July. Therefore the two payments for one academic year are paid over two financial years. First instalments include half of the amount that HEIs have predicted that they will need within the academic year, plus any Service User Funding (SUF). The second instalment comprises the remaining estimated amount. Where HEIs have submitted inaccurate predictions, their funding the following year is adjusted accordingly.

Grants for Voluntary Organisation funding (GVO) is a historical funding mechanism that has now been discontinued. We continued to pay residual amounts that had been previously agreed to voluntary organisations by the General Social Care Council (GSCC). We do not anticipate that there will be any future payments.

## 8. Looking Forward

The NHSBSA has set itself a challenging set of strategic goals for the next five year period, with the primary aim of making its services as customer focused and efficient as possible. Compelling visions have been developed for each service which offer the potential to deliver significant benefits to customers, patients and the wider NHS.

The strategic goals, underpinned by the organisational purpose and values, are summarised in the figure below.

### Our purpose:

We are a business services organisation. We use insight to deliver improvements that matter

### Our goals:

- 1 We will collaborate to create £1 billion for patients
- 2 We will reduce our unit costs by 50%
- 3 We will always improve service and deliver great results for customers
- 4 We will digitise 80% of customer and supplier interactions
- 5 We will derive insight from data to drive change
- 6 We will invest time in our people, and we will recognise them for their commitment, contribution and passion

### Our values:

Ambition | Integrity | Innovation | Respect | Teamwork | Quality | Accountability

Student Services has developed a focused Change Plan and Service Improvement roadmap to contribute to NHSBSA's strategic ambitions. Our key deliverables include:

- Relocation of Social Work Bursaries from Bridge House, Newcastle to Hesketh House, Fleetwood.
- Revising our Customer Charter to set out clear service measures for our customers.
- Implementing additional Special Interest Groups and regional HEI events to enhance our engagement with customers.
- Customer care training to develop our skills base in our interactions with customers.
- Introduction of a range of communication products and tools to raise awareness for current and prospective customers.
- Disabled Student Allowance guidance for customers and suppliers.
- Management restructure to align the service with delivering the strategic goals and service ambitions.



## Appendix 1 – NHS Student Bursary Rates

**Table 1A - Bursary Rates: Gross Annual Amounts Payable 1 April 2014 to 31 August 2014**

	Pre-2007 Scheme		2007-2012 Scheme		2012 Scheme
	Mainstream Students	Traditional Diploma Students	Mainstream Students	Traditional Diploma Students	All Students
Basic Award – Parental Home	£2,151	£6,645	£2,422	£6,917	£2,163
Basic Award – Lodgings Rate	£2,630	£6,645	£2,900	£6,917	£2,591
Basic Award – London Lodgings Rate	£3,230	£7,810	£3,501	£8,079	£3,128
Extra Weeks Allowance – Parental Home	£54	-	£54	-	£54
Extra Weeks Allowance – Lodgings Rate	£82	-	£82	-	£82
Extra Weeks Allowance – London Lodgings Rate	£106	-	£106	-	£106
Non Means Tested Grant	-	-	-	-	£1,000
Spouse or First Child Dependants Rate	£2,640	£2,238	£2,640	£2,338	£2,400
Child Under 11 Dependants Rate	£552	£473	£539	£539	£539
Child 11 to 15 Dependants Rate	£1,104	£940	£539	£539	£539
Child 16 to 17 Dependants Rate	£1,468	£1,245	£539	£539	£539
Child Over 18 Dependants Rate	£2,113	£1,783	£539	£539	£539
Standard PLA Rate	-	-	£1,303	£1,104	£1,180
Standard OSA Rate	-	£752	-	-	-
Standard OSA Rate – Aged 26	£448	-	-	-	-
Standard OSA Rate – Aged 27	£777	-	-	-	-
Standard OSA Rate – Aged 28	£1,152	-	-	-	-
Standard OSA Rate – Aged 29	£1,524	-	-	-	-
Standard SPA Rate	£1,303	£1,104	-	-	-
Childcare Allowance – One Child (Maximum Weekly Rate)	£126.65	£126.65	£126.65	£126.65	£126.65
Childcare Allowance – Two or more children (Maximum Weekly Rate)	£187.85	£187.85	£187.85	£187.85	£187.85
Disabled Students Allowance – Non-Medical Helper	£20,520	£20,520	£20,520	£20,520	£20,520
Disabled Students Allowance – Specialist Equipment	£5,162	£5,162	£5,162	£5,162	£5,162
Disabled Students Allowance – Other	£1,724	£1,724	£1,724	£1,724	£1,724
Tuition Fees Variable Rate – 2013/14	-	£3,465	-	£3,465	£3,465
Tuition Fees Standard Rate – 2013/14	-	£1,380	-	£1,380	£1,380

**Table 1B - Bursary Rates: Gross Annual Amounts Payable from 1 September 2014 to 31 March 2015**

	Pre-2007 Scheme		2007-2012 Scheme		2012 Scheme
	Mainstream Students	Traditional Diploma Students	Mainstream Students	Traditional Diploma Students	All Students
Basic Award – Parental Home	£2,151	£6,645	£2,446	£6,986	£2,185
Basic Award – Lodgings Rate	£2,630	£6,645	£2,929	£6,986	£2,617
Basic Award – London Lodgings Rate	£3,230	£7,810	£3,536	£8,160	£3,159
Extra Weeks Allowance – Parental Home	£54	-	£54	-	£54
Extra Weeks Allowance – Lodgings Rate	£82	-	£82	-	£82
Extra Weeks Allowance – London Lodgings Rate	£106	-	£106	-	£106
Non Means Tested Grant	-	-	-	-	£1,000
<b>Dependants Rates</b>					
Spouse or First Child Dependants Rate	£2,666	£2,260	£2,666	£2,260	£2,424
Child Under 11 Dependants Rate	£558	£478	£544	£544	£544
Child 11 to 15 Dependants Rate	£1,115	£949	£544	£544	£544
Child 16 to 17 Dependants Rate	£1,483	£1,257	£544	£544	£544
Child Over 18 Dependants Rate	£2,134	£1,801	£544	£544	£544
Standard PLA Rate	-	-	£1,316	£1,115	£1,192
Standard OSA Rate	-	£760	-	-	-
Standard OSA Rate – Aged 26	£452	-	-	-	-
Standard OSA Rate – Aged 27	£785	-	-	-	-
Standard OSA Rate – Aged 28	£1,164	-	-	-	-
Standard OSA Rate – Aged 29	£1,539	-	-	-	-
Standard SPA Rate	£1,316	£1,115	-	-	-
<b>Childcare Allowance</b>					
Childcare Allowance – One Child (Maximum Weekly Rate)	£127.50	£127.50	£127.50	£127.50	£127.50
Childcare Allowance – Two or more children (Maximum Weekly Rate)	£189.55	£189.55	£189.55	£189.55	£189.55
<b>Disabled Students Allowance</b>					
Disabled Students Allowance – Non-Medical Helper	£20,725	£20,725	£20,725	£20,725	£20,725
Disabled Students Allowance – Specialist Equipment	£5,214	£5,214	£5,214	£5,214	£5,214
Disabled Students Allowance – Other	£1,741	£1,741	£1,741	£1,741	£1,741
<b>Tuition Fees</b>					
Tuition Fees Variable Rate – 2013/14	-	£3,465	-	£3,465	£3,465
Tuition Fees Standard Rate – 2013/14	-	£1,380	-	£1,380	£1,380

## Appendix 2 – NHS Student Bursary Eligible Professions

**Table 2 - The NHS Bursary Scheme New Rules**

For students who started their course on or after 1 September 2012

Eligible Healthcare Professions	
Chiropodist or Podiatrist	Operating Department Practitioner
Dental Hygienist/Dental Therapist	Orthotist/Prosthetist
Dentist	Orthoptist
Dietician	Physiotherapist
Doctor	Radiographer
Nurse	Radiotherapist
Midwife	Speech and Language Therapist
Occupational Therapist	

**Table 2B - The NHS Bursary Scheme Old Rules**

For students who started their course before 1 September 2012

Eligible Healthcare Professions	
Audiologist	Occupational Therapist
Chiropodist or Podiatrist	Operating Department Practitioner
Dental Hygienist/Dental Therapist	Orthotist/Prosthetist
Dentist	Orthoptist
Dietician	Physiotherapist
Doctor	Radiographer
Nurse	Radiotherapist
Midwife	Speech and Language Therapist

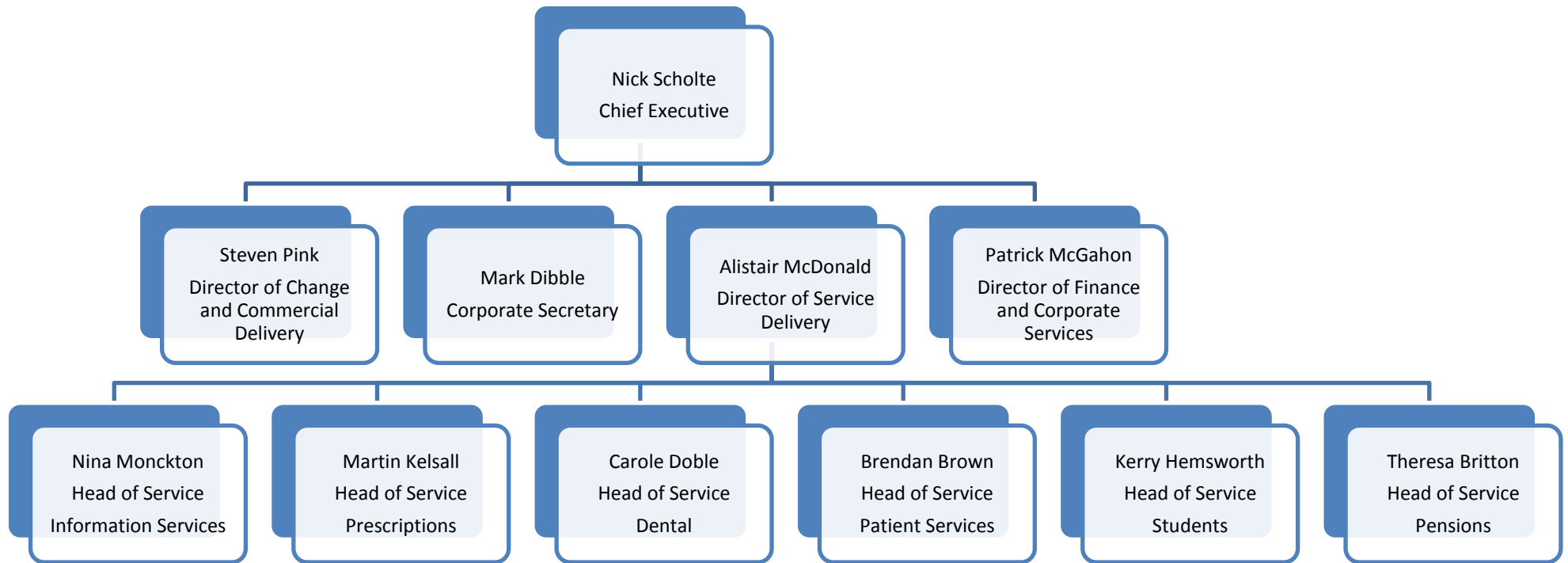
## Appendix 3 – Social Work Bursary Rates: Academic Year 2014/15

	Studying in London	Studying outside London
<b>Undergraduate students: Courses starting on or after 1 September 2013</b>		
Basic bursary	£5,262.50	£4,862.50
Basic bursary: Part-time courses	Pro-rata rate based on duration of course	
Placement Travel Allowance (included in Basic Grant where students are within 'cap')	£862.50	
<b>Postgraduate students:</b>		
Basic bursary	£3,762.50	£3,362.50
Maintenance grant	£4,066	£2,634
Placement Travel Allowance (included in Basic Grant where students are within 'cap')	£862.50	
Adult Dependants Allowance	£2,668	
Parents' Learning Allowance	£1,523	
Childcare Allowance – One Child (Maximum Weekly Rate)	£150.23	
Childcare Allowance – Two or more children (Maximum Weekly Rate)	£257.55	
Part-time courses	All elements of postgraduate bursary received at pro rata rate based on duration of course	
Disabled Students Allowance – Non-Medical Helper	£20,725	
Disabled Students Allowance – Specialist Equipment	£5,212	
Disabled Students Allowance – Other	£1,741	
<b>Postgraduate course Tuition Fees</b>		
Postgraduate course Tuition Fees	Up to £3,996	
Part-time postgraduate course Tuition Fees	Up to £1,998	

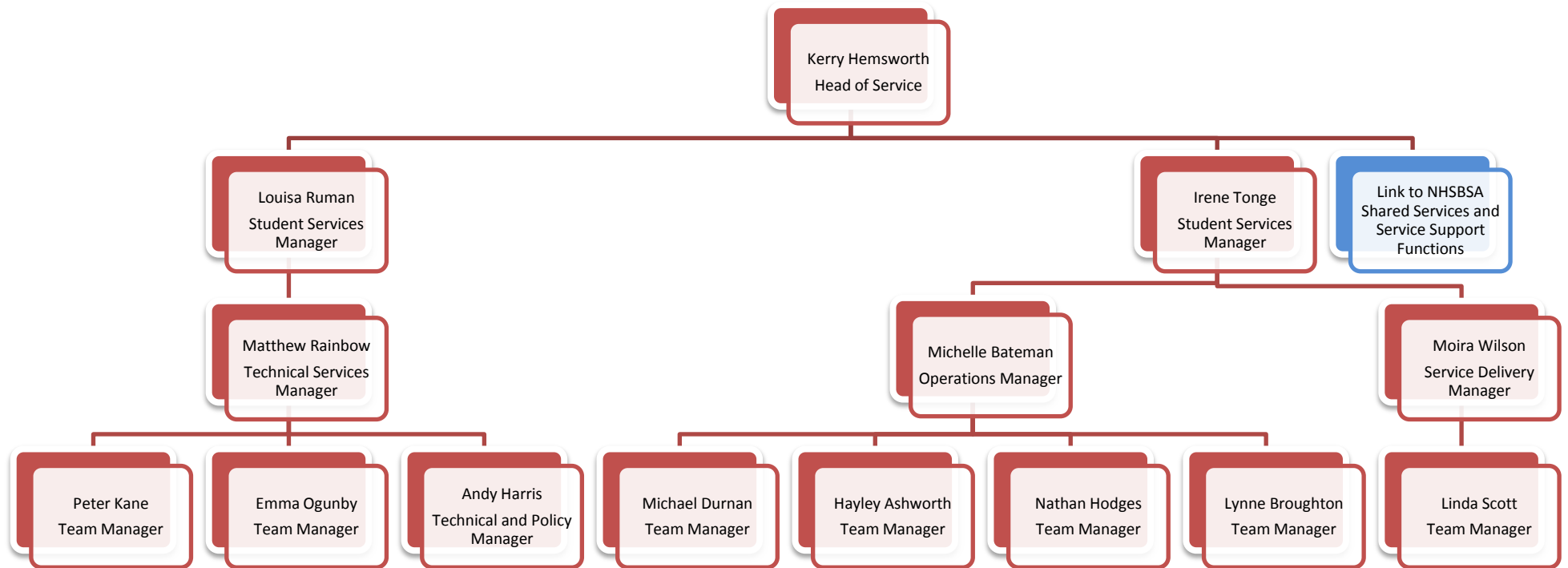
## Appendix 4 – Education Support Grant Rates: Academic Year 2014/15

<b>Daily fee per student</b>	
Standard daily fee per student per day in standard placement	£20
Daily fee per student per day where placement provider: Has charitable status Has registered private company status Is a service-user or carer led organisation	£20
Skills Development Days	£10
<b>HEI administration fee</b>	
Admin fee per student	£2
<b>Funding for involvement of people who use the services and their carers</b>	
A one-off payment to each HEI per annum	£7,400

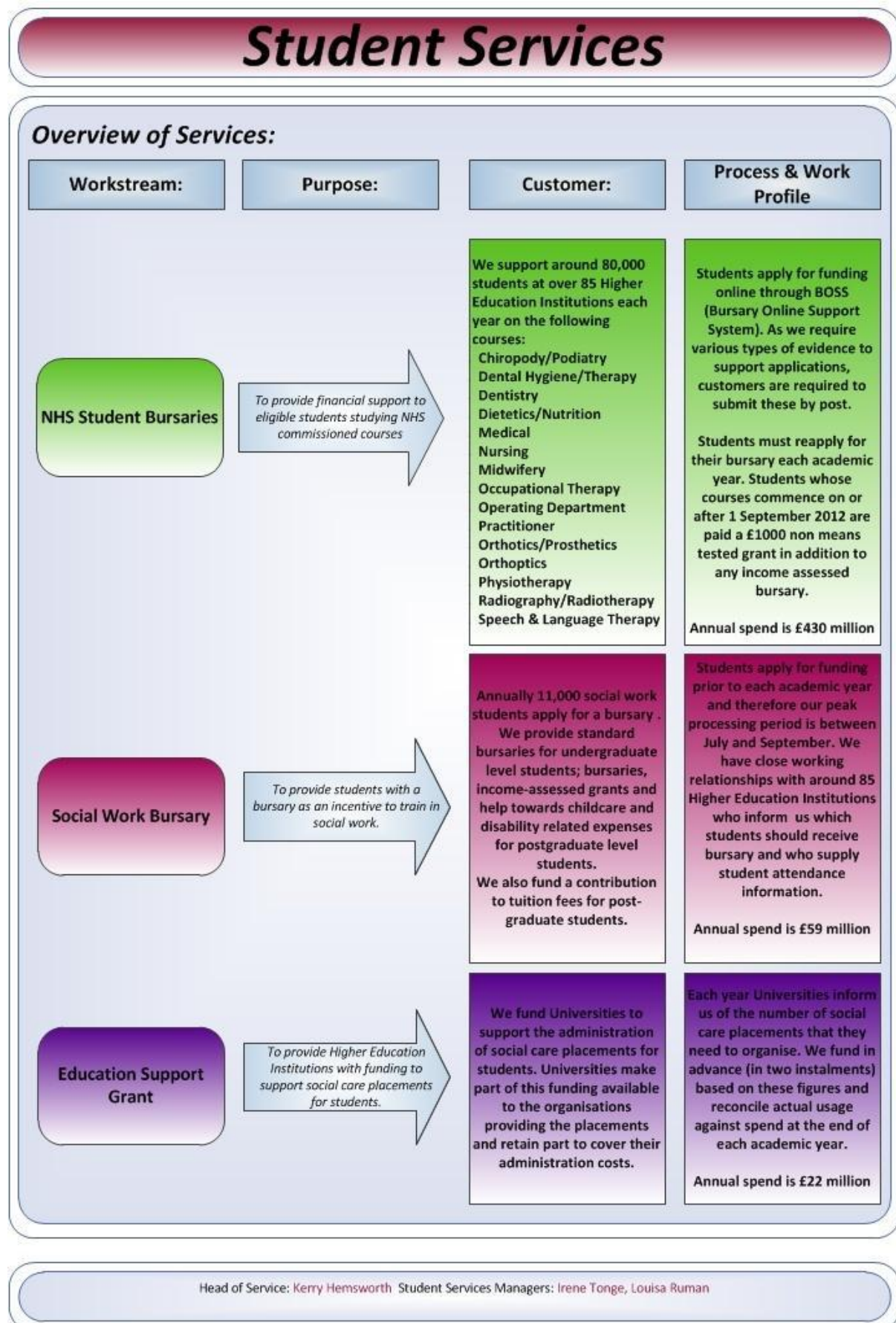
## Appendix 5 – NHSBSA Senior Management Structure



## Appendix 6 – Organisation Chart



## Appendix 7 – Student Services Overview



Head of Service: Kerry Hemsworth Student Services Managers: Irene Tonge, Louisa Ruman

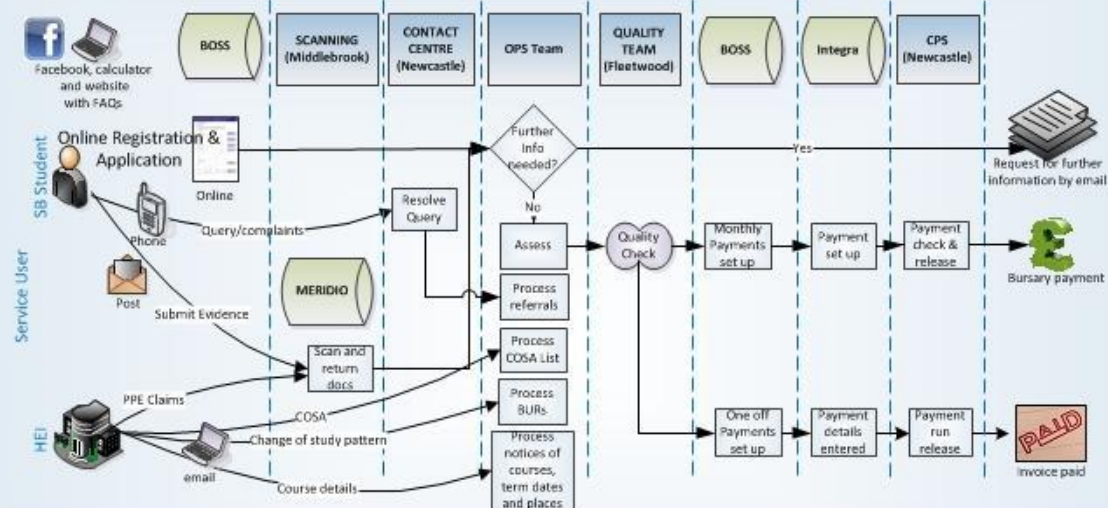


## Student Services – NHS Student Bursaries

NHS Student Bursaries are paid according to NHS Bursary Scheme Rules as published by the Department of Health to support eligible healthcare students on a number of pre-registration health professional courses. Students create an online account through the BOSS system, submit applications online and then post necessary supporting documentation. We check for eligibility and then assess entitlement based on information supplied, including additional allowances such as, Dependants' Allowance, Childcare Allowance and Disabled Student Allowance (DSA). Higher Education Institutions (HEIs) confirm student attendance at the beginning of their first year of study, prior to any funding being released.

In addition to their bursary, eligible students have their standard course tuition fees paid and receive reimbursement of costs incurred whilst on practice placements.

### Process, staff and systems:



Documents, supporting evidence and paper application forms are scanned in Middlebrook. Students' applications are assessed in Fleetwood. Customer enquires are taken by Contact Centre Services in Bridge House, Newcastle.

#### Glossary:

BOSS – Bursary Online Support System  
 CPS – Finance Team  
 HEI – Higher Education Institution  
 Integra – NHSBSA Payment System  
 Meridio – Document Management System

#### Awards/Payment Types:

Basic Bursary Award  
 Non Means Tested Grant  
 DSA - Disabled Students Allowance  
 Dependants/Childcare Allowances  
 PPE – Practice Placement Expenses

#### Miscellaneous Work Items:

CoC - Change of Circumstances  
 Extra Weeks  
 Tuition Fees (Medical & Dental students)  
 COSA – Confirmation of Student Attendance  
 BURs – Bursary forms from HEIs

### Service User Profile:

During 2014-15 we processed:

**New Student applications:** 30,684  
**Continuing Student applications:** 49,176

Medical & Dental Student applications: 12,160  
 Dependants Allowance: 17,866  
 Childcare Allowance: 10,261  
 Disabled Students Allowance: 3,949  
 Practice Placement Expenses: 24,082  
 Change of Circumstances: 11,379

### Performance Profile:

Performance against SLAs are as follows:

Application assessed within 20 days: 100%  
 Dependants Allowance assessed within 20 days: 100%  
 CoC processed within 20 days: 100%  
 PPE claims processed within 20 days: 100%  
 DSA applications processed within 10 days: >99%

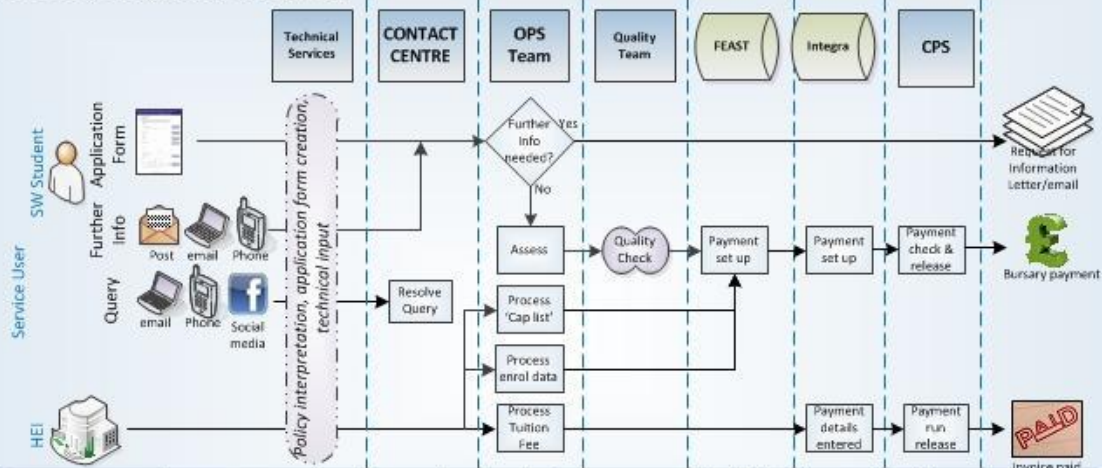
We achieve an absolute cash variance accuracy rate of 98.73%

Head of Service: Kerry Hemsworth Student Services Managers: Irene Tonge, Louisa Ruman  
 Sponsors: Department of Health – Jenny Firth (Financial Strategy, Workforce Development); Health Education England – Calum Pallister (Head of Finance)

# Student Services Social Work Bursary

The social work bursary is made available by the Department of Health as an incentive for English resident students to qualify in social work. Students download an application form from the BSA website and post it to the SWB team along with any evidence that they need to support their application. The SWB team assess for bursary eligibility by checking a student's residency status, course type and income levels. Postgraduate students can apply for help with childcare costs, and disability related costs alongside their bursary. Universities confirm students' attendance in each study year prior to bursary being released. From 2013, the DH have capped the number of new students who will receive a bursary, Universities nominate which students to receive the full bursary, other eligible students will continue to receive a placement travel allowance.

## Process, staff and systems:



Documents, supporting evidence and paper application forms are posted to Hesketh House and copied.  
Students' applications are assessed in Fleetwood. Customer enquires are taken by Contact Centre Services in Bridge House, Newcastle.

**Glossary:**  
 FEAST – Further Education and Technology System  
 CPS – Finance Team  
 HEI – Higher Education Institution  
 Integra – NHSBSA Payment System

**Awards/Payment Types:**  
 Basic Grant  
 Maintenance Grant  
 DSA - Disabled Students Allowance  
 Dependents/Childcare Allowances  
 PTA – Practice Travel Allowance  
 PLA – Parent Learning Allowance

**Miscellaneous Work Items:**  
 Tuition Fee Contribution  
 Capping – Confirmation of bursary award holders

### Service User Profile:

During 2014-15 we received:  
**9,093** applications, broken down as follows:

Postgraduate student applications:	3,204
Undergraduate student applications:	5,327
Childcare Allowance:	372
Disabled Student Allowance:	190

We also answered 47,616 queries from students, carried out 572 withdrawn student reassessments and made 27,586 BACs payments.

### Performance Profile:

Team Performance against SLAs are as follows:

Process bursary applications within 20 days:	100%
Process Childcare applications within 5 days:	100%
Prepare payments to students within 5 days:	100%

**We achieve an assessment accuracy rate of over 99%**  
**Our Cash Variance accuracy rate for 2014-15 was 99.98%**

### Future developments:

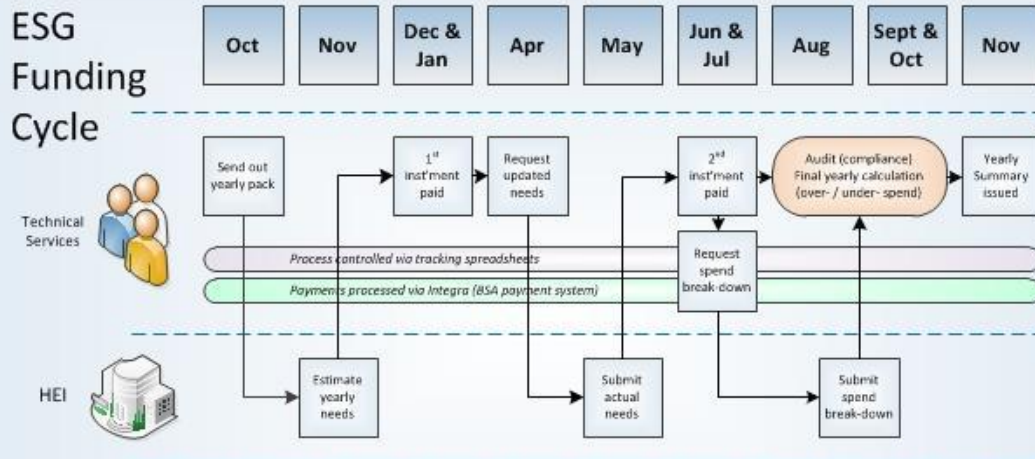
A programme of work is progressing to transfer Social Work Bursary and Education Support Grant administration from Bridge House, Newcastle to Hesketh House, Fleetwood. Anticipated completion date of the transfer is November 2015.

Head of Service: Kerry Hemsworth Student Services Managers: Irene Tonge, Louisa Ruman Service Delivery Manager: Moira Wilson  
 DH Sponsor: Keith Wright - Policy Manager – Workforce Development Strategy

# Student Services Education Support Grant

NHSBSA assumed responsibility for the administration of the Education Support Grant (ESG) as from August 2012. The ESG is a payment made to Higher Education Institutions (HEIs) each year to help them arrange and manage essential placement experiences for students of Social Work.

## Process, staff and systems:



ESG is processed by the SWB team in Bridge House. The team maintain close working relationships with individuals within each of the 85 HEIs who receive funding through ESG.

### Glossary / Acronyms:

SWB: Social Work Bursary

HEI: Higher Education Institution (University)

Integra: NHSBSA Payment system

## Service User Profile:

We provide 85 HEIs with funding for:

- Daily fee per student** which is paid to the placement provider/ agency via the HEI;
- Daily admin fee** which is paid to the HEI as a contribution towards the costs involved in planning and distributing this funding; and
- Funding for the involvement of people who use service and carers.**

## Performance Profile:

Our SLA is to make payment within 10 days of receiving appropriate funding from the Department of Health.

To date we have achieved this in 100% of cases.

## Future developments:

A programme of work is progressing to transfer Social Work Bursary and Education Support Grant administration from Bridge House, Newcastle to Hesketh House, Fleetwood. Anticipated completion date of the transfer is November 2015.

Head of Service: **Kerry Hemsworth** Student Services Managers: **Irene Tonge, Louisa Ruman** Service Delivery Manager: **Moira Wilson**

DH Sponsor: **Keith Wright** - Policy Manager – Workforce Development Strategy

## Appendix 8 – SB Cash Payments: National Summary by Profession (excludes tuition fees)

Profession	No of Students Paid <sup>1</sup>	Total Paid <sup>2</sup> (£000's)	% of All Professions Paid	Average Paid per Student (£)
<b>Medical &amp; Dental</b>	<b>9,680</b>	<b>23,236</b>	<b>5.90%</b>	
<i>Of which:</i>				
Medicine	8,554	20,909	5.31%	2,444
Dentistry	1,126	2,327	0.59%	2,067
<b>Nursing &amp; Midwifery</b>	<b>67,881</b>	<b>301,307</b>	<b>76.51%</b>	
<i>Of which:</i>				
Nursing	60,247	265,308	67.37%	4,404
Midwifery	7,634	35,999	9.14%	4,716
<b>Allied Health Professions</b>	<b>19,601</b>	<b>58,129</b>	<b>14.76%</b>	
<i>Of which:</i>				
AHP Foundation	58	216	0.05%	3,728
Chiropody	1,170	3,776	0.96%	3,227
Dietetics	1,245	3,526	0.90%	2,832
Occupational Therapy	4,940	16,153	4.10%	3,270
Orthoptics	264	756	0.19%	2,865
Physiotherapy	4,967	12,091	3.07%	2,434
Prosthetics & Orthotics	106	327	0.08%	3,087
Radiography	3,628	12,349	3.14%	3,404
Radiotherapy	883	2,948	0.75%	3,339
Speech & Language Therapy	2,340	5,986	1.52%	2,558
<b>Professions Complementary to Dentistry</b>	<b>692</b>	<b>2,337</b>	<b>0.59%</b>	
<i>Of which:</i>				
Dental Hygiene	57	215	0.05%	3,778
Dental Hygiene & Dental Therapy	578	1,909	0.48%	3,303
Dental Therapy	57	213	0.05%	3,732
<b>Other Professions</b>	<b>2,243</b>	<b>8,780</b>	<b>2.23%</b>	
<i>Of which:</i>				
Audiology	125	181	0.05%	1,447
Operating Department Practitioner	2,118	8,599	2.18%	4,060
<b>All Professions</b>	<b>100,097</b>	<b>393,789</b>	<b>100.00%</b>	

<sup>1</sup>The figures relate to the number of students paid any bursary element in the period 01 April 2014 to 31 March 2015. As such figures exclude Nil award holders, i.e. EU Fees only students and students whose award was fully abated by means-testing. No adjustment has been made to the student count to reflect part year attendance and payment, e.g. for first and final year students or students who withdrew from or returned to training in the period.

<sup>2</sup>Includes all bursary elements (Basic Award, allowances and one-off payments) paid directly to students or to 3<sup>rd</sup> party providers of services for disabled students. **Excludes tuition fees paid directly to Higher Education Institutions to meet the tuition fee liability of students studying medicine or dentistry.**

**The total paid is all payments that were due and do not include accruals.**

## Appendix 9 – SB Cash Payments: National Summary by Award Element

Scheduled Monthly Payments		
Award Element	Number	Amount Paid (£000's)
Basic Award <sup>1</sup>	86,479	153,829
Childcare Allowance	9,367	29,993
Dependants Allowance	16,621	32,947
Extra Weeks Allowance	86,376	85,251
Non Means Tested Grant <sup>2</sup>	72,664	57,216
Older Students Allowance <sup>3</sup>	7	5
Parent Learning Allowance <sup>4</sup>	16,653	13,706
Single Parent Addition <sup>3</sup>	0	0
<b>Total (Monthly Payments)</b>	<b>288,167</b>	<b>372,946</b>
One-off Payments		
Award Element	Number	Amount Paid
Disabled Students Allowance	3,949	9,239
Practice Placement Expenses	24,082	11,599
Tuition Fees <sup>5</sup>	10,551	36,560
Other	8	4
<b>Total (One-off Payments)</b>	<b>38,590</b>	<b>57,402</b>
<b>Grand Total – All Elements</b>	<b>326,757</b>	<b>430,349</b>

<sup>1</sup> Covers 45 weeks for traditional diploma and 30 weeks for mainstream students on pre-2007 and 2007-2012 Schemes.

<sup>2</sup> 2012 Scheme students only.

<sup>3</sup> Pre-2007 Scheme students only.

<sup>4</sup> 2007-2012 & 2012 Scheme students only.

<sup>5</sup> Medical & Dental students only.

## Appendix 10 – SB Cash Payments: Summary by Professional Group - Financial Years 2005/06 to 2014/15

Financial Year \ Professional Group	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15
	£000	£000	£000	£000	£000	£000	£000	£000	£000	£000
Medical & Dental	21,090	28,447	30,452	34,012	35,198	49,788	52,199	61,409	63,635	59,796
Nursing & Midwifery	358,272	370,664	370,858	369,762	385,721	399,366	385,371	349,453	320,586	301,307
Allied Health Professions	45,482	48,778	47,800	46,285	47,737	50,296	50,275	52,759	55,697	58,129
Professions Complementary to Dentistry	1,425	1,558	1,675	1,636	1,606	1,744	1,886	1,863	2,102	2,337
Other Health Professions	9,127	11,934	14,714	16,766	19,270	20,262	19,692	16,735	10,114	8,780
<b>Total</b>	<b>435,395</b>	<b>461,380</b>	<b>465,499</b>	<b>468,461</b>	<b>489,533</b>	<b>521,456</b>	<b>509,422</b>	<b>482,219</b>	<b>452,134</b>	<b>430,349</b>

## Appendix 11 – SB Cash Payments: Summary by Award Element - Financial Years 2005/06 to 2014/15

Financial Year \ Award Element	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15
	£000	£000	£000	£000	£000	£000	£000	£000	£000	£000
Basic Award	315,551	323,824	322,994	324,771	337,862	343,363	318,061	258,840	193,789	153,829
Childcare Allowance	17,726	22,589	26,249	26,009	29,039	32,724	33,838	33,507	32,174	29,993
Dependants Allowance	28,143	30,506	32,101	33,755	36,528	38,960	39,370	37,964	35,767	32,947
Extra Weeks Allowance	23,031	26,176	27,690	29,518	33,640	39,258	47,677	61,355	76,114	85,251
Older Students Allowance	21,649	22,209	18,245	10,896	4,524	1,001	256	57	17	5
Non Means-tested Grant	0	0	0	0	0	0	0	11,830	35,398	57,216
Parent Learning Allowance	0	0	2,227	7,024	12,123	15,730	16,608	16,190	14,944	13,706
Single Parent Addition	6,844	7,272	6,429	4,023	1,842	145	92	17	1	0
Disabled Students Allowance	4,516	6,178	6,684	6,879	7,993	8,647	8,641	9,072	10,422	9,239
Extensions	1,551	1,633	1,665	1,714	1,639	1,738	2,056	2,088	838	0
Hardship Fund	0	0	4	6	4	8	7	6	4	0
Initial Expenses	988	949	888	904	878	805	326	29	0	0
Practice Placement Expenses	8,283	8,691	8,920	8,978	9,271	11,077	10,792	11,137	11,717	11,599
Tuition Fees	6,829	11,141	11,237	13,814	14,046	27,560	30,312	38,442	40,211	36,560
Other	273	197	156	162	141	145	1,386	1,684	738	4
<b>Total</b>	<b>435,395</b>	<b>461,380</b>	<b>465,499</b>	<b>468,461</b>	<b>489,533</b>	<b>521,456</b>	<b>509,422</b>	<b>482,219</b>	<b>452,134</b>	<b>430,349</b>

## Appendix 12 – SB Activity: Total Applications Approved<sup>1</sup> by Profession

Profession	New Students	Continuing Students	Total
AHP Foundation	0	33	33
Audiology	0	46	48
Chiroprody	381	691	1,072
Dental Hygiene	22	20	42
Dental Hygiene & Dental Therapy	203	385	588
Dental Therapy	21	37	58
Dentistry <sup>2</sup>	0	1,122	1,122
Dietetics	377	874	1,251
Medicine <sup>2</sup>	0	11,038	11,038
Midwifery	2,400	4,252	6,652
Nursing	20,704	32,394	53,098
Occupational Therapy	1,596	2,641	4,237
Operating Department Practitioner	873	905	1,778
Orthoptics	99	136	235
Physiotherapy	1,704	2,824	4,528
Prosthetics & Orthotics	34	55	89
Radiography	1,263	2,026	3,289
Radiotherapy	274	439	713
Speech & Language Therapy	731	1,418	2,149
<b>Total</b>	<b>30,684</b>	<b>61,336</b>	<b>92,020</b>

<sup>1</sup>The number of applications approved is not the number of NHS Bursary holders in training. **(This is because we assess and approve more applications than students in training, due to those that never take up a training place or students that subsequently withdraw)** <sup>2</sup> No figures are given for Dentistry or Medicine as the 1<sup>st</sup> year of funding for such students is normally provided by Department for Business Innovation and Skills.



## Appendix 13 – SB Activity: Key Work Items Processed

Work Item	Processed
HEI Notification of Withdrawal, Resumption or Extension	12,216
Contact Centre Services (Student Helpline) Referrals	22,204
HEI Referrals (Emails and Correspondence)	12,987
Student Change of Circumstances	11,379
General Correspondence	192
Integra Invoices (Tuition Fees and DSA)	29,726
Complaints	258
Practice Placement Expenses claims	58,406
Disabled Student Allowance claims or associated correspondence	25,177

Source: Divisional Plans

## Appendix 14 – SB Equal Opportunities Monitoring

Questions asked with % of respondents:	
Gender	100%
Age Group	100%
Ethnic Group	100%
Religion	100%
Sexual Orientation	100%
Disability	100%

What is your gender?		Which of the following best describes your sexual orientation?	
Female	81.64%	Heterosexual / Straight	89.52%
Male	16.69%	Prefer not to say	7.90%
Prefer not to say	1.67%	Lesbian / Gay	1.69%
		Bisexual	0.89%
Which age group applies to you?		Are you a disabled person as defined by the Equality Act 2010?	
16-24	57.26%	No	92.06%
25-34	28.33%	Yes	4.34%
35-44	11.15%	Prefer not to say	3.60%
45-54	3.11%		
55-64	0.15%		
65+	0.00%		

What is your ethnic group?		What is your religion or belief?	
White	74.75%	Christianity	44.49%
Black or Black British – African	8.19%	No Religion	35.46%
Asian or Asian British - Indian	3.13%	Prefer not to say	8.61%
Prefer not to say	2.87%	Islam	5.12%
Mixed	2.79%	Other	2.79%
Asian or Asian British – Pakistani	2.15%	Hinduism	1.82%
Asian or Asian British – Other	1.93%	Sikhism	0.66%
Black or Black British – Caribbean	1.65%	Buddhism	0.63%
Other Ethnic Group	0.95%	Judaism	0.34%
Asian or Asian British - Bangladeshi	0.61%	Jainism	0.08%
Asian or Asian British – Chinese	0.60%		
Black or Black British – Other	0.38%		

## Appendix 15 – SWB Applications Information

**Table 15A - Number of bursary applications in payment per award element**

Award Element/Transaction Type		
New postgraduate students		1,588
	Of which, bursary in payment	1,518
	Of which, PTA only	70
Continuing postgraduate students		1,616
	Of which, bursary in payment	1,597
	Of which, PTA only	19
New undergraduate students		2,410
	Of which, bursary in payment	2,212
	Of which, PTA only	198
Continuing undergraduate students		2,917
	Of which, bursary in payment	2,917
	Of which, PTA only	0
Child Care Allowance applications		372
Disabled Student Allowance applications		190
Number of BACs payments		27,586
Number of new student debtors (withdrawal calculations)		572
Reassessments due to provisional awards		72
Queries from students via Contact Centre		2,880
Tuition fee invoices processed		3,125

**Table 15B - Number of applications and correspondence received per month**

	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	De c	Jan	Fe b	Ma r	Total
<b>Bursary applications</b>	0	1,855	1,765	1,682	1,484	1,488	673	265	59	25	7	2	<b>9,305</b>
<b>DSA applications</b>	13	15	20	15	15	35	32	24	20	20	8	7	<b>224</b>
<b>Childcare applications</b>	13	35	45	74	75	124	95	55	27	51	23	26	<b>643</b>
<b>Correspondence</b>	1,653	1,246	1,239	1,050	987	1,954	1,416	1,081	845	1,011	791	990	<b>14,263</b>

## Appendix 16 – SWB Queries

**Table 16A - Number of telephone, email, written and Facebook queries 2014/15**

	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Total
<b>Calls to CCS</b>	1468	2082	1791	1899	2218	4231	3840	1469	968	1363	823	1052	<b>23,204</b>
<b>Emails to CCS</b>	299	318	247	289	347	494	229	126	111	181	131	108	<b>2,880</b>
<b>Facebook queries</b>	198	385	291	289	265	518	221	22	35	48	32	n/a	<b>2,304</b>
<b>Emails to SWB team</b>	1123	920	889	762	705	1385	1164	849	614	733	706	645	<b>10,495</b>
<b>Other correspondence</b>	553	611	528	511	382	929	466	303	2483	975	296	696	<b>8,733</b>

**Table 16B - Breakdown of types of query**

Type of query	
Assessment – how it works	10.1%
Payment Query	13.0%
Other	9.8%
Capping methodology	9.9%
Childcare allowance queries	10.3%
Application form completion	14.7%
DSA	4.4%
Enrolment query	1.3%
Prospective Students	11.0%
Eligibility for bursary	2.9%
Reference Number	0.1%
Overpayment queries	2.6%
Extended Funding	2.6%
Repeat Funding	1.7%
Change of address notification	0.7%
Provisional Assessments	1.1%

## Appendix 17 – SWB Equal Opportunities Monitoring

Questions asked with % of respondents:	
Gender	100%
Age Group	100%
Ethnic Group	98.79%
Religion	99.68%
Sexual Orientation	100%
Disability	87.88%

What is your gender?		Which of the following best describes your sexual orientation?	
Female	86.69%	Heterosexual / Straight	89.83%
Male	13.31%	Lesbian / Gay	2.53%
Unanswered	0.00%	Bisexual	1.89%
		Prefer not to say	5.75%
		No answer	0.00%
Which age group applies to you?		Are you a disabled person as defined by the Equality Act 2010? (from those who answered 'Yes' [752 out of 6,866 who answered this question])	
16-24	34.23%	Learning disability / difficulty	49.44%
25-34	34.11%	Longstanding illness	16.43%
35-44	22.00%	Mental health problem	9.89%
45-54	8.93%	Sensory impairment	4.94%
55-64	0.73%	Physical impairment	6.22%
65+	0.00	Other	0.96%
No answer	0.00	No condition given	12.12%

What is your ethnic group?		What is your religion or belief?	
White	70.65%	Christian	47.99%
Mixed	3.48%	None	45.21%
Asian	2.18%	Islam/Muslim	4.02%
Black or Black British	20.26%	Sikh	0.64%
Indian	1.11%	Hindu	0.44%
Irish	0.69%	Buddhist	0.67%
Other	0.42%	Other	0.71%
Unanswered	1.21%	Unanswered	0.32%

## Appendix 18 – SWB Applications Breakdown

**Table 18A - Bursary applications by academic level 2014/15 (Academic Year)**

Academic level	Total bursary applicants	Of which part time
Postgraduate	3,115	72
Undergraduate	5,129	102
<b>Total</b>	<b>8,244</b>	<b>174</b>

**Table 18B - Bursary applicants by year and level of study**

		2010/11		2011/12		2012/13		2013/14		2014/15	
		UGD	PGD	UGD	PGD	UGD	PGD	UGD	PGD	UGD	PGD
<b>Year of study</b>	<b>1</b>	3,857	1,757	3,833	1,968	3,299	1,943	35	1,843	2212	1518
	<b>2</b>	3,187	1,196	3,561	1,583	3,265	1,801	2,778	1,948	25	1310
	<b>3</b>	2,914	138	2,925	166	3,082	196	2,982	230	2437	224
	<b>4</b>	255	19	373	34	445	42	406	34	373	54
	<b>5</b>	38	6	66	6	84	12	61	10	61	7
	<b>6</b>	10	1	16	4	19	6	17	10	12	1
	<b>7</b>	3	0	6	0	13	4	11	5	9	1
<b>Total</b>		<b>10,264</b>	<b>3,117</b>	<b>10,780</b>	<b>3,761</b>	<b>10,207</b>	<b>4,004</b>	<b>6,290</b>	<b>4,080</b>	<b>5129</b>	<b>3115</b>
		<b>13,381</b>		<b>14,541</b>		<b>14,211</b>		<b>10,370</b>		<b>8,244</b>	

**Table 18C - Bursary applicants by age 2014/15**

<b>Age at start of academic year</b>	<b>Number of bursary applicants</b>	<b>% of total</b>
Under 21	751	9.11%
21 – 25	2,288	27.75%
26 – 30	1,875	22.74%
31 – 35	913	11.07%
36 – 40	978	11.86%
41 – 45	720	8.73%
46 – 50	509	6.17%
51 – 55	167	2.03%
56+	43	0.52%
<b>Total</b>	<b>8,244</b>	<b>-</b>

**Table 18D - Bursary applicants by gender 2014/15**

<b>Gender</b>	<b>Number of bursary applicants</b>	<b>% of total</b>
Female	6,678	81.00%
Male	1,566	19.00%
<b>Total</b>	<b>8,244</b>	<b>-</b>

## Appendix 19 – SWB Expenditure

**Table 19A - Social Work Bursary expenditure in the 2014/15 financial year broken down by element:**

Non income assessed bursary		Income assessed allowances					Other	
UG basic grant (£000's)	PG basic grant (£000's)	Maintenance grant (£000's)	Adult dependent allowance (£000's)	Parents learning allowance (£000's)	Childcare allowance (£000's)	Disabled Students Allowance (£000's)	Placement Travel Expenses (£000's)	Tuition fees (£000's)
24,626	10,121	7,712	389	1,030	1,640	756	673	12,348

**Table 19B - Comparison of 2014/15 expenditure to previous years:**

	Student bursary spend (£000's)	DSA supplier spend (£000's)	Tuition Fee spend (£000's)	Total (£000's)	% year on year increase	Cumulative % increase against 09/10
2010/11	63,319	686	9,786	73,791	4.7%	4.7%
2011/12	68,008	459	13,114	81,581	10.6%	15.8%
2012/13	68,667	1,125	13,578	83,370	2.2%	18.3%
2013/14	56,156	674	13,883	70,713	-15.2%	0.4%
2014/15	46,191	756	12,348	59,295	-16.1%	-15.7%



## Appendix 20 –ESG Expenditure

**Table 20A - ESG transactions**

Payment of ESG to HEIs	
First instalment	85
Second instalment	85
Students funded	13,609
Audit checks	1,178

**Table 20B – ESG Expenditure**

Education Support Grant								
Academic Year	2011/12		2012/13		2013/14		2014/15	
	1 <sup>st</sup> Instalment (£000's)	2 <sup>nd</sup> Instalment (£000's)	1 <sup>st</sup> Instalment (£000's)	2 <sup>nd</sup> Instalment (£000's)	1 <sup>st</sup> Instalment (£000's)	2 <sup>nd</sup> Instalment (£000's)	1 <sup>st</sup> Instalment (£000's)	2 <sup>nd</sup> Instalment (£000's)
Placement Fees	13,788	13,160	14,084	11,241	11,563	9,513	8,817	8,817
HEI Admin Fees	1,217	1,151	1,251	1,082	1,154	951	882	882
Skills Development Days	0	0	198	58	1,158	1,050	866	866
Service User & Carer Funding	606	0	607	0	599	0	591	0
Totals	<b>15,611</b>	<b>14,311</b>	<b>16,140</b>	<b>12,381</b>	<b>14,474</b>	<b>11,514</b>	<b>11,156</b>	<b>10,565</b>