

# Financial Support & Bursary Policy

## Learning Services Worcestershire

August 2022 – July 2023

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## Section 1: Introduction

Learning Services Worcestershire provides accessible opportunities for learning to residents across the whole of Worcestershire. We are therefore committed to removing barriers to participation where they exist, including those of a financial nature. All financial support funds are designed to help with the costs of taking part in education where learners would otherwise not be able to afford to do so. Funds are not designed to supplement normal daily expenses and Learning Services Worcestershire must ensure that the funds go to those who genuinely need them.

For 19+ Adult Learning, this policy should be read alongside our 19+ Fees Policy, which explains more about the different programmes we offer, and the fees and charges associated with them.

At all ages, the policy should also be read in conjunction with the application form for the bursary fund you are applying to access.

If you would like help with making an application, you can:

- Speak to your tutor
- Call 01905 728537
- Email [youngadultlearning@worcestershire.gov.uk](mailto:youngadultlearning@worcestershire.gov.uk) (for 16-19 enquiries)
- Email [adultlearning@worcestershire.gov.uk](mailto:adultlearning@worcestershire.gov.uk) (for 19+ enquiries)

### 1.1 Types of financial support available

Our different programmes offer access to different financial support. If you are unsure which is the right fund for you, please contact us for advice.

#### 1) 16-19 Bursary Fund

For learners accessing 16-19 Education, including those aged 19-24 accessing 16-19 Education with an EHCP (discretionary bursary only for 19-24)

#### 2) AEB Discretionary Learner Support Fund

For learners accessing 19+ qualification programmes up to Level 2 and those accessing Level 3 qualifications via Legal Entitlement

#### 3) Advanced Learner Loans Bursary Fund

For learners financing their studies via Advanced Learner Loans

#### 4) Community Learning Bursary Fund

For learners accessing 19+ non-accredited courses

### 1.2 Additional forms of support

Learning Services Worcestershire is able to meet the cost of putting in place a reasonable adjustment, as set out in the [Equality Act 2010](#), for learners who have an identified difficulty and/or disability, so that they can achieve their learning goal. Requests in line with reasonable adjustments are not considered financial support within our 16-19 and 19+ Skills and Qualifications programmes up to

Level 2. For these programmes, support is considered separately to this policy and guidance. Please contact us for more details. For Advanced Learner Loans, the bursary scheme is used to support the provision of reasonable adjustments and is covered within that section of this policy.

### 1.3 How decisions are made

Applications to all bursary funds will be overseen by the Participation Support Officer and decisions about awards will be made with the approval of the relevant member of the Learning Services Worcestershire management team.

Decisions about which applications are supported and to what value will be made based on each learner's individual circumstances and their actual financial need, aligned to government guidance. These will vary from learner to learner depending on, for example, their household income, the distance they need to travel to access their learning, and the requirements of their programme.

Learners must meet the age and residency criteria to be eligible for help from the relevant bursary fund.

Payments cannot be made retrospectively so prompt application is advised once a need for support is identified. Decisions are made within 10 days of an application being received, subject to all the supporting evidence also being received. Entitlement begins from the date that a decision is made and an award letter is issued.

### 1.4 General eligibility and conditions

- 1) Learning Services Worcestershire is allocated funding by the Education and Skills Funding Agency (ESFA) to aid learners funded by the ESFA. Learners are advised to apply early as funding is limited.
- 2) Learners are eligible to apply for funding if they meet both the requirements for ESFA funding, as stated in the ESFA Funding Rules for the course they are undertaking, and any additional eligibility rules specific to the Bursary Fund they are applying to.
- 3) Applications for financial support will be accepted throughout the academic year or until the funding has been fully allocated, whichever is sooner. Awards cease at the end of each academic year, or sooner if stated in the Award letter. However, please note that awards and associated payments cannot be backdated.
- 4) All requests for support are reviewed on a case-by-case basis.
- 5) Applications will be dealt with on a strict date-received basis and this will be dependent on all paperwork being fully completed with all the necessary accompanying documentation. Incomplete applications cannot be considered and will be returned to applicants.
- 6) Eligibility does not mean an entitlement as funds are limited. No guarantee can be given that funds will be available when you apply.

- 7) If there is a high demand on the funds, awards may be given at a reduced rate.
- 8) Funding support awards are always conditional on learners remaining on the course, maintaining good attendance, actively participating and making reasonable progress. For the purposes of financial support, good attendance is considered to be attendance in full at 85% or more of the available sessions. Where learners consistently arrive late or leave sessions early, this will be taken into account when considering their entitlement to continue receiving financial support.
- 9) If a learner does not meet the minimum attendance rate then award payments may be suspended or refused. However, the learner will be provided with an opportunity to submit any extenuating circumstances for consideration.
- 10) Funding support awards are also conditional on learners complying with the Learning Services Worcestershire code of conduct, and that of any subcontracted learning provider (where appropriate). Learners who do not meet these conditions may be required to return equipment, resources and any funding support they have received.
- 11) Awards will be made in accordance with the published guidance in the Funding Rules from the ESFA.
- 12) Awards for financial support are made on the basis of an identified need, but actual payments must be supported by evidence of expenditure. The value of the award is not usually the same as the eventual amount reimbursed as the award value usually differs from actual expenditure. Reimbursement will only be made up to the annual allocation amount stated in the award decision.

## Section 2: 16-19 Bursary Fund

If your eligibility has been confirmed and you are accessing, or will be accessing, 16-19 Education with Learning Services Worcestershire then you may also be eligible for financial support alongside your programme.

### 2.1 Bursary Elements

There are three funds within the 16-19 Bursary that applications can be made to:

- 1) 16-19 Vulnerable Learner Bursary
- 2) 16-19 Discretionary Bursary
- 3) 19-24 Discretionary, if continuing on a study programme or have an EHCP
- 4) 16-18 Free Meals

### 2.2 Vulnerable Learner Bursary

#### 1) Eligibility

To be eligible for a Vulnerable Learner Bursary of up to £1,200 per year, you must be on a programme of 30 weeks or more and in one of the following defined groups:

- In Care, or classed as a “Looked After Child” by the Local Authority
- Care Leaver
- Receiving Income Support (IS) or Universal Credit (UC) because you are financially supporting yourself, or financially supporting yourself and someone who is dependent on you and living with you, such as a child or a partner
- Receiving Disability Living Allowance (DLA) or Personal Independence Payments (PIP) in your own right, as well as Employment Support Allowance (ESA) or Universal Credit (UC) in your own right

If you are on programme less than 30 weeks then the amount you are eligible to receive will be pro-rata.

#### 2) Evidence Requirements

- If you are In Care or are a Care Leaver, written confirmation of your current or previous looked-after status from the relevant Local Authority or Social Worker
- If you are in receipt of Income Support or Universal Credit, a copy of an in-date Income Support or Universal Credit award notice
- If you are receiving Universal Credit or Employment Support Allowance and Disability Living Allowance or Personal Independence Payments, a copy of the UC claim from DWP. Evidence of receipt of DLA or PIP must also be provided

### 2.3 Discretionary Bursary

The Discretionary Bursary can financially support you if you do not qualify for the Vulnerable Learner’s Bursary but still have financial support needs.

This support is based on household income and can support a need which arises at any time during your programme, resulting from a sudden change in circumstances such as redundancy in the family, a sudden drop in income or family breakdown, etc.

Each application is income-assessed and based on relevant financial need. The amount of the bursary award will be determined by your individual need and the funds available. You may be assisted with:

- Transport
- Stationery and equipment
- Lunch
- Clothing for work experience

Funds may also support other needs, subject to approval.

### 1) Eligibility

To be eligible for a Discretionary Learner Bursary, your total household income must be less than £30,000 per annum, including any benefits and earnings.

### 2) Evidence Requirements

- Letter of confirmation from DWP regarding receipt of any benefits, including Income Support, Income-Based Job Seekers Allowance, Employment and Support Allowance or Universal Credit
- Letter of confirmation from HMRC regarding any Tax Credit
- Letter of confirmation from your local council detailing any Housing or Council Tax benefit
- Letter of confirmation regarding your DLA or PIP or Carer's Allowance
- Previous 3 months of Universal Credit award notice
- Copy of P60 or audited accounts, if self-employed

## 2.4 Free Meals Allocation

The Further Education Free Meal fund is similar to Free School Meals, but for those who are 16 or over, but under 19, on 31 August 2022. Learners aged 19 or over at the start of their programme are not eligible unless they have an EHCP. Learners who turn 19 during their programme can continue to receive Free Meals, so long as they remain eligible. If you are entitled to a Further Education Free Meal, you will receive a payment or vouchers towards the cost of your lunch if you attend training for a full day. Alternatively, at some training centres you may receive a paid-for meal instead of a payment.

### 1) Eligibility

To be eligible for Free Meals, you (if living independently) or your parents (if you are living with them) must receive one or more of the following benefits:

- Income Support
- Income-Based Job Seekers Allowance
- Income-related Employment and Support Allowance (ESA)
- Support under part VI of the Immigrations and Asylum Act 1999

- The guarantee element of State Pension Credit
- Child Tax Credit (provided not entitled to Working Tax Credit and with an annual gross income of no more than £16,160, as assessed by HMRC)
- Working Tax Credit run-on (but not Working Tax Credit itself)
- UC with net earnings not exceeding the equivalent of £7,400 for each year (after tax and not including any benefits received)

If you received Free School Meals when you were at school but do not meet the eligibility criteria as above, please speak to us. There are some additional criteria which can be considered if you believe that your household circumstances have not significantly changed and the move to Universal Credit may have affected your eligibility.

## 2) Evidence Requirements

- Letter of confirmation from DWP regarding receipt of any benefits, including Income Support, Income-Based Job Seekers Allowance, Employment and Support Allowance or Universal Credit
- Letter of confirmation from HMRC regarding any Tax Credit
- Previous 3 months Universal Credits award notice
- Letter to confirm support under Part VI of the Immigration and Asylum Act 1999.

## 2.5 Eligibility for 16-19 Bursaries for Young Offenders

As a Young offender, you can apply for a bursary if you meet the eligibility criteria and:

- Are serving a non-custodial sentence
- Have been released early from a custodial sentence (except on temporary licence)
- Have been remanded at a non-secure institution

Even if eligible, you cannot apply for a bursary if:

- You are serving a custodial sentence
- You have been released from a custodial sentence on temporary licence
- You have been remanded at a secure institution

## 2.6 Principles of support

If you raise a need for additional support to access learning, the Learning Services Worcestershire Participation Support Officer, or another representative of the team, will speak with you to discuss your needs. Wherever possible, solutions that do not require an application for financial support to the Bursary Fund will be identified and implemented. These may be solutions such as moving you to a course at a more accessible location or assisting an application for childcare funding.

In all cases, Learning Services Worcestershire are obliged to ensure that all appropriate support is being accessed from other sources, prior to awarding 16-19 Bursary payments. For example, learners may be able to access childcare funding from mainstream sources or make an application via Care2Learn - see [Childcare Choices](#).



Decisions will also reflect the most cost-effective and suitable way of meeting an identified need. For example, if you require support with travel then we will give consideration to the length of the journey you need to take and things such as whether single-ticket reimbursement or provision of a bus pass is most appropriate – also taking into consideration the staff time which would be involved in processing different methods of support.

Where financial support is provided by Learning Services Worcestershire, it is your responsibility to tell the Department for Work and Pensions about any Bursary Funding you receive, as payments may affect your eligibility for state benefits.

## 2.7 Award values

If you qualify for the Free Meals initiative and a bursary, an allocation will be made based on combined funding. Annual allocations will be made aligned to household income bands as follows:

<b>Banding</b>	<b>Household Income</b>	<b>Maximum Annual Allocation</b>
A	Vulnerable Learner Status	£1,440
B	Below £19,999	£1,320
C	£20,000 to £24,999	£1,200
D	£25,000 to £29,999	£1,080

The above allocations are based on a full-time, full-year programme of 30 weeks or more. If you meet the criteria and are on a programme lasting for less than 30 weeks you will receive an allocation based on a pro-rata amount (with the actual amount dependent on the specific financial needs you have).

## Section 3: AEB Discretionary Learner Support Fund (DLSF)

If your eligibility has been confirmed and you are accessing, or will be accessing, a 19+ qualification at Level 2 or below with Learning Services Worcestershire then you may also be eligible for financial support alongside your programme. You may also be eligible if you are aged 19-23 and are accessing a Level 3 programme under Legal Entitlement.

### 3.1 Support categories

Learning Services Worcestershire offers Discretionary Learner Support from three categories:

- Hardship Funding
- 20+ Childcare Funding
- ICT Devices and Connectivity

The Discretionary Learner Support Fund can help you with a contribution towards the cost of travel, educational visits, books and equipment needed for your course (where these are not already provided as part of your course). The fund can also assist with childcare in some circumstances, and it may also be possible to provide access to technology that is essential for participation.

There is also a limited fund to assist with tuition fees for those who are not eligible for a fee reduction.

### 3.2 Eligibility for support

AEB Discretionary Learner Support is based on household income and can support a need which arises at any time during your programme, resulting from a sudden change in circumstances such as redundancy in the family, a sudden drop in income or family breakdown, etc.

Each application is income-assessed and based on relevant financial need. The amount of the bursary award will be determined by your individual need and the funds available. You may be assisted with expenses such as:

- Transport
- Stationery and equipment
- Personal Protective Equipment or other relevant clothing for vocational courses

Funds may also support other needs, subject to approval.

#### 1) Eligibility

To be eligible for a Discretionary Learner Support Bursary, your total household income must be less than £30,000 per annum, including any benefits and earnings.

#### 2) Evidence Requirements

- Letter of confirmation from DWP regarding receipt of any benefits, including Income Support, Income-Based Job Seekers Allowance, Employment and Support Allowance or Universal Credit
- Letter of confirmation from HMRC regarding any Tax Credit

- Letter of confirmation from your local council detailing any Housing or Council Tax benefit
- Letter of confirmation regarding DLA or PIP or Carer’s Allowance
- Previous 3 months of Universal Credit award notice
- Copy of P60 or audited accounts, if self-employed

### 3.2 Principles of support

If you raise a need for additional support to access learning, the Learning Services Worcestershire Participation Support Officer, or another representative of the team, will speak with you to discuss your needs. Wherever possible, solutions that do not require an application for financial support to the Discretionary Learner Support Fund will be identified and implemented. These may be solutions such as moving you to a course at a more accessible location and/or supporting online access to reduce the burden of travel, registering you with the Good Things Foundation Databank to aid online connectivity, or assisting an application for childcare funding.

In all cases, Learning Services Worcestershire are obliged to ensure that all appropriate support is being accessed from other sources, prior to awarding Discretionary Learner Support. For example, many learners are able to access childcare funding from mainstream sources and shouldn’t need to make an application to DLSF in order to access the part-time courses we offer - see [Childcare Choices](#).

Decisions will also reflect the most cost-effective and suitable way of meeting an identified need. For example, if you require support with travel then we will give consideration to the length of the journey you need to take and things such as whether single-ticket reimbursement or provision of a bus pass is most appropriate – also taking into consideration the staff time which would be involved in processing different methods of support.

Where financial support is provided by Learning Services Worcestershire, it is your responsibility to tell the Department for Work and Pensions about the Learner Support Funding you receive, as payments may affect your eligibility for state benefits.

### 3.3 Award values

Annual allocations will be made aligned to household income bands as follows:

Banding	Household Income	Maximum Annual Allocation
A	-	-
B	Below £19,999	£1,320
C	£20,000 to £24,999	£1,200
D	£25,000 to £29,999	£1,080

The above allocations are based on a full-time, full-year programme of 30 weeks or more. Most Learning Services Worcestershire qualifications at 19+ are studied on a part-time basis. Therefore allocations are based on a pro-rata amount (with the actual amount dependent on the specific financial needs you have).

More than one application may be submitted (to allow for changes in circumstances throughout the year) and all requests for financial assistance will be considered. However, it may not always be possible to allocate funding.

## Section 4: Advanced Learner Loans Bursary Fund (ALLBF)

If you have been approved for an Advanced Learner Loan to fund your studies on a Learning Services Worcestershire programme, you may also be eligible for financial support alongside your programme.

### 4.1 Support categories

Learning Services Worcestershire offers Learner Support from three categories:

- Learning Support and the provision of reasonable adjustments
- Hardship Funding
- 20+ Childcare Funding

The Advanced Learner Loans Bursary Fund can help you with a contribution towards the cost of travel, educational visits, books and equipment needed for your course (where these are not already provided as part of your course). The fund can also assist with childcare in some circumstances.

As the Advanced Learner Loan is used to finance the tuition fees, there is no bursary support for this.

### 4.2 Eligibility for support

Access to the Advanced Learner Loan Bursary Fund is based on either an agreed need to meet the cost of putting in place a reasonable adjustment, as set out in the [Equality Act 2010](#) or to support a need arising from financial hardship. Needs may arise at any time during your programme, resulting from a sudden change in circumstances such as redundancy in the family, a sudden drop in income or family breakdown, etc.

Hardship and childcare applications are income-assessed and based on relevant financial need. The amount of the bursary award will be determined by your individual need and the funds available. You may be assisted with expenses such as:

- Transport
- Stationery and equipment
- Personal Protective Equipment or other relevant clothing for vocational courses

Funds may also support other needs, subject to approval.

#### 1) Eligibility

To be eligible for an Advanced Learner Loan Bursary:

- Your total household income must be less than £30,000 per annum, including any benefits and earnings (unless your application relates to a reasonable adjustment)

- Your loan must have been approved by the Student Loans Company and you must have passed what is known as the “liability point” (our staff can advise on this)
- You should claim under either the Discretionary Learner Support Fund (for Level 2 qualifications) OR the Advanced Learner Loans Bursary Fund, if you have costs which are relating to courses at both levels (again, our staff can help advise on this)

If you are Released on Temporary Licence then you are not eligible to access the Advanced Learner Loan Bursary Fund.

## 2) Evidence Requirements

- Letter of confirmation from DWP regarding receipt of any benefits, including Income Support, Income-Based Job Seekers Allowance, Employment and Support Allowance or Universal Credit
- Letter of confirmation from HMRC regarding any Tax Credit
- Letter of confirmation from your local council detailing any Housing or Council Tax benefit
- Letter of confirmation regarding DLA or PIP or Carer’s Allowance
- Previous 3 months of Universal Credit award notice
- Copy of P60 or audited accounts, if self-employed

## 4.3 Principles of support

If you raise a need for additional support to access learning, the Learning Services Worcestershire Participation Support Officer, or another representative of the team, will speak with you to discuss your needs. Wherever possible, solutions that do not require an application for financial support to the Advanced Learner Loan Bursary Fund will be identified and implemented. These may be solutions such as moving you to a course at a more accessible location and/or supporting online access to reduce the burden of travel, registering you with the Good Things Foundation Databank to aid online connectivity, or assisting an application for childcare funding.

In all cases, Learning Services Worcestershire are obliged to ensure that all appropriate support is being accessed from other sources, prior to awarding a bursary. For example, many learners are able to access childcare funding from mainstream sources and shouldn’t need to make an application to ALLBF in order to access the courses we offer - see [Childcare Choices](#).

Decisions will also reflect the most cost-effective and suitable way of meeting an identified need. For example, if you require support with travel then we will give consideration to the length of the journey you need to take and things such as whether single-ticket reimbursement or provision of a bus pass is most appropriate – also taking into consideration the staff time which would be involved in processing different methods of support.

Where financial support is provided by Learning Services Worcestershire, it is your responsibility to tell the Department for Work and Pensions about the Learner Support Funding you receive, as payments may affect your eligibility for state benefits.

## 4.4 Award values

Annual allocations will be made aligned to household income bands as follows:

<b>Banding</b>	<b>Household Income</b>	<b>Maximum Annual Allocation</b>
A	-	-
B	Below £19,999	£1,320
C	£20,000 to £24,999	£1,200
D	£25,000 to £29,999	£1,080

The above allocations are based on a full-time, full-year programme of 30 weeks or more. Most Learning Services Worcestershire qualifications at 19+ are studied on a part-time basis. Therefore allocations are based on a pro-rata amount (with the actual amount dependent on the specific financial needs you have).

More than one application may be submitted (to allow for changes in circumstances throughout the year) and all requests for financial assistance will be considered. However, it may not always be possible to allocate funding.

## Section 5: Community Learning Bursary Fund (CLBF)

The Community Learning Bursary Fund is a very limited fund which supports those in greatest need to access to a further reduction in course fees. If you are not eligible for concessions under the advertised criteria, or you are eligible for a concession but cannot afford the reduced rate, then you can make an application to this fund.

### 5.1 Eligibility for support

Many situations are already covered by our concessions offer for Community Learning, but the bursary fund is designed to bridge the gap for needs outside of those which are already supported. Examples of need may be a sudden change in circumstances such as redundancy in the family, a sudden drop in income, a recent family breakdown or ill health.

Applications for fees to be reduced or waived due to financial difficulty may be awarded in two circumstances:

- If you have been referred by a professional body (such as the Hereford & Worcestershire Wellbeing and Recovery College, Job Centre Plus, Starting Well, a school, a GP or a Social Prescriber) – note you can get a referral from the Recovery College by enrolling for their services here: [hwellbeingandrecoverycollege.org.uk](http://hwellbeingandrecoverycollege.org.uk)
- If you can identify that attendance on the course will have a significant impact on your employment prospects

Applications should be made on a good-faith basis as they are designed to cover situations which may be difficult to evidence. However, any evidence which you wish to provide with your application will usually make it easier for us to understand your circumstances and to provide support. Your application will require a personal statement alongside any other evidence you provide.

### 5.2 Principles of support

If you raise a need for additional support to access learning, the Learning Services Worcestershire Participation Support Officer, or another representative of the team, will speak with you to discuss your needs. Wherever possible, solutions that do not require an application for financial support to the Community Learning Bursary Fund will be identified and implemented.

### 5.3 Award values

In most circumstances, the maximum award under the Community Learning Bursary Fund will be a reduction in fees for up to three courses per academic year.

## Section 6: Childcare

Any financial assistance provided for childcare is only available for the timetabled hours of your course. To claim support, you must be using an Ofsted-registered childcare provider and not be in receipt of childcare support from any other agency.

Payments for childcare will be based on your attendance and excludes childcare costs outside term time. If you withdraw from the course or have payments stopped due to poor attendance, you will be responsible for the payment of outstanding fees to the childcare provider.

Applications to cover childcare for more than two children will only be considered in exceptional circumstances. As detailed elsewhere, Early Years Education Entitlement must be used before making a claim for childcare support.

Childcare support cannot be used to pay for:

- Christmas, Easter and Summer holiday periods and periods of Half Term
- Deposits, retainers, or to make advance payments
- Food for your child

Payments may also be withheld if you change the number of days or hours your child attends their setting and you fail to inform the Participation Support Officer.

Note – Childcare for learners up to the age of 20 follows different rules. Please ask for more information if this applies to you.

## Section 7: Appeals Procedure

If you have concerns regarding the decision made on your application for Financial Support, please appeal in writing to the Service Manager, Anna Lee, at [adultlearning@worcestershires.gov.uk](mailto:adultlearning@worcestershires.gov.uk).

Support from the funds described in this document is not guaranteed.

All information is correct at the time of going to print, but may be subject to change and alteration (August 2022).

Learning Services Worcestershire reserves the right to alter or amend this policy at any time, particularly where there is an arising need in line with the requirements of the Education and Skills Funding Agency (ESFA).