

Student Services Annual Report 2013/14



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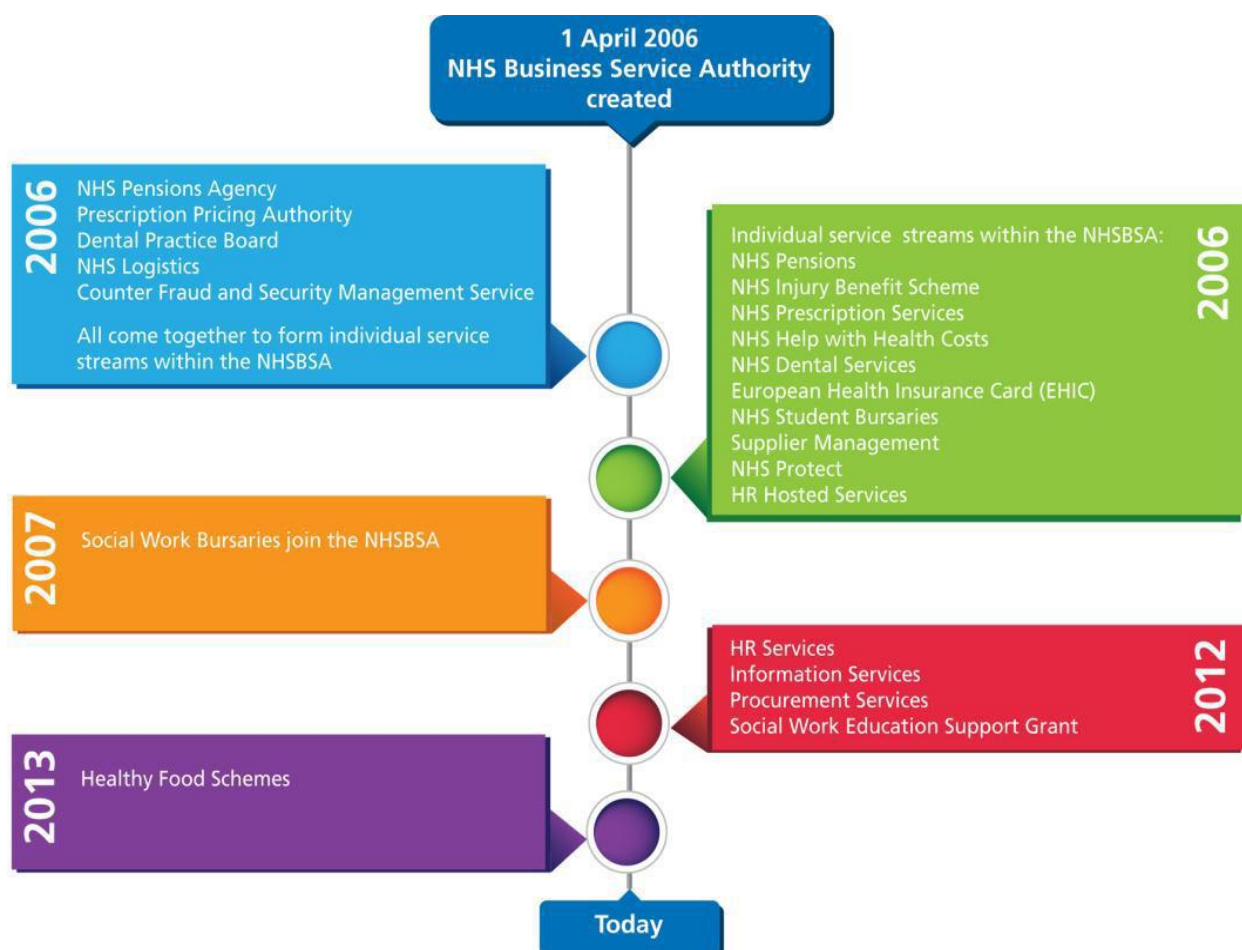
Our aim is:

‘to ensure our customers are paid correctly and on time, every time’

1. General Overview and Introduction

As an Arms Length Body of the Department of Health, the NHS Business Services Authority (NHSBSA) was formed in 2006 as a Special Health Authority. A number of previously disparate NHS organisations came together into one business: the NHSBSA. This change was implemented in order to provide a single leadership focus for the new entity and to deliver operating efficiencies through synergies and economies of scale. Since 2006, the NHSBSA has delivered a 46% efficiency improvement in these services by: delivering ongoing operational improvements, implementing new technology and taking on new business which exploits existing infrastructure. As a result, the NHSBSA has been able to return in excess of £300m for re-investment in care. This has been achieved while consistently delivering against agreed key performance indicators and absorbing volume growth and normal inflation drivers.

The 2006 core range of business services has been maintained by the NHSBSA and new services have been added as a function of stakeholder need. A summary is shown below.



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

Student Services Overview

There are three key service streams within Student Services:

NHS Student Bursaries	Social Work Bursaries	Social Work Education Support Grant
Assessing and paying bursaries totalling approximately £450 million to around 80,000 health students and over 80 Higher Education Institutions	Assessing and paying bursaries totalling approximately £72 million to around 11,000 social work students	Making payments of around £28 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, Social Work Education Support Grant and Customer Contact Services
- Stella House, Newcastle - Client Engagement, Programme Management, Finance, Information Technology and other corporate functions

Across the three service streams, we administer payments totalling approximately £550 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:

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

NHS Student Bursaries (SB) processes approximately 80,000 applications per annum 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 £450 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 2013/14 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 Social Work 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:

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

SWB process approximately 11,000 applications and 3,360 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 £72 million per annum and Social Work Education Support Grant around £28 million per annum. The SWB rates applicable during 2013/14 are detailed in [Appendix 3](#).

Social Work Education Support Grant

SWESG 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 SWESG 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 Social Work Education Support Grant.

Policy Changes 2013/14

NHS Student Bursaries

The NHS Bursary Scheme New Rules apply to students starting on their courses on or after 1 September 2012. The 2nd edition includes a number of changes from the 1st edition of the NHS Bursary Scheme Rules. (* denotes that this change also applies to the 14th edition of the NHS Bursary Scheme Old Rules, which apply to students that started training before 1 September 2012).

- An additional requirement has been added for non-medical students to make the policy clearer that in addition to the general immigration and residence requirements, the NHS Bursary Scheme will only provide bursaries for non-medical students if the **NHS organisation holding the contract for the non-medical course has agreed with the institution providing the course that the student can take up the place on that course**
- Additional criteria to course eligibility to say **the minimum level of qualification required for a course to be eligible is Diploma of Higher Education Level**
- The tuition fee rate for medical and dental students studying in Northern Ireland has been added*
- New addition added to state **that no childcare allowance will be payable where the student, spouse, civil partner or partner is in receipt of financial support for childcare provided under a number of other student support regulations and guidance** *

- Amendment to the normal procedure to follow when applying for an NHS Bursary to make it clear that new students are required to apply directly for their student bursary*
- An additional requirement to request that students include in their letter of complaint or appeal to the Department of Health **their explicit consent that the Department of Health may share the necessary personal information with the NHSBSA to investigate their case fully** *
- A number of minor and inconsequential changes have been made throughout the rest of the text including changes in paragraph numbers*

The following additional change was made to the 14th edition of the NHS Bursary Scheme:

- The bursary rates uplifted by 3.22% (basic award only)

Social Work Bursaries

In May 2012 Department of Health (DH) opened a consultation; '[Reforming the Social Work Bursary](#)', which resulted in the adoption of a number of changes to the administration of the social work bursary. These changes met DH policy objectives of:

- reducing and controlling expenditure (previously the bursary had been demand-led)
- improving quality
- maintaining a sufficiency of supply of social workers into the profession

DH undertook a significant amount of stakeholder engagement in developing consultation options and in devising the methodology for restricting fairly the number of bursaries to be paid (the 'capping' methodology).

The key changes to the bursary are:

- a reduced, capped number of bursaries available each year with HEIs having responsibility for identifying individual students who will receive the bursary
- the postgraduate bursary to be available in both years of a course, however, the undergraduate bursary to only be available in years 2 and 3 of a course
- a standard contribution towards placement travel expenses to be available for students not within the cap, but who meet SWB eligibility criteria

In 2013/14 the NHSBSA supported the first year of this changed bursary by:

- redesigning all bursary application forms, supporting information and other documentation
- ensuring consistent, timely communication with all stakeholders

- developing the process for communicating with HEIs to ensure that capping data relating to new postgraduate students was received in a timely manner, enabling bursary and placement travel allowance to be paid correctly

Current students who started their course prior to 2013 will continue to receive their bursary under the previous arrangements and therefore the NHSBSA is, in effect, administering the bursary under two distinct rule sets. In academic year 2014/15 undergraduate students (2nd year) will start to be assessed under the new arrangements.

Social Work Education Support Grant

In September 2013, DH announced its intention to open a consultation on the future of the SWESG with a view to introducing a reformed SWESG in the 2014/15 academic year maintaining the existing budget.

The objectives of reforming the SWESG are to:

- introduce funding methodology that is not demand-led
- update the funding methodology to recognise the changed arrangements for practice placements promoted by the Social Work Reform Board (SWRB)
- improve the quality of practice placements

Key Issues for the 2013/14 Financial Year

A range of issues experienced during 2012 in respect of NHS Student Bursaries resulted in service failures that had detrimental impact on students and HEIs. An end-to-end service review was carried out which resulted in the launch of the Student Bursaries Improvement Programme in July 2012. A range of quality improvements have been delivered including enhanced staff training and improved quality assurance mechanisms. Further details can be found in Section 3. The lessons learned from 2012 and the resultant actions have enabled a good service delivery during 2013/14.

A new Head of Service post was created in 2013 to lead Student Services. This brings together the three service workstreams into one area and work has commenced to enable integration of the three workstreams towards achieving a fully integrated service for the benefit of the customers and the staff. In support, new posts have been created including a Student Services Manager and a Processing, Planning and Development Manager. All management staff across NHSBSA have been engaged in a 'Leadership Means' development programme, which is focused on understanding the motivational values system and how this can support relationship management towards maximising performance.

NHS Student Bursaries was hosted through the Equiniti Paymaster contract during the major part of the financial year. In March/April 2014, NHS Student Bursaries relocated within Hesketh House to enable hosting via the Capita network. This change has delivered several benefits including:

- significantly reduced reliance on the Citrix platform to access the Bursary Online Support System (BOSS)
- video-conferencing capabilities via the Capita network
- Capita network telephones which enable free phone calls between corporate sites
- enhanced file sharing capabilities across Student Services
- hot-desk facilities for visiting staff
- plasma screens to enable real-time performance information displays and key information updates for staff
- additional meeting room capacity

The Bursary Online Support System (BOSS) was implemented during 2012 and has enabled an enhanced and digitised application system for NHS bursary students. Since its implementation, the number of students processed via BOSS increased with all students now on the online system. As at 31 March all processes and payments from the Further Education and Student Technology (FEAST) system ceased. A FEAST decommissioning project is underway. As with any new Information Technology system, a number of issues have been identified in BOSS for which a programme of enhancements is scheduled. These consist of a combination of upgrade of system end of life components and enhancements to address performance and stability issues.

The system in use in Social Work Bursaries is the FEAST plus system and has been declared at end of life. Belfast City Council have agreed to continue to provide software support for a limited time, however it has been acknowledged that system replacement is essential. A Strategic Technology Solutions programme will be launched during 2014/15 to take this area of work forward.

The outcome of the consultation of SWESG is expected and interim arrangements have been put into place. The rate changes will be implemented from the first instalment in January 2015.

2. Performance Report

Overall, Student Services has delivered good performance against Key Performance Indicators (KPIs) throughout 2013/14. The unprecedented service issues experienced during 2012 in NHS Student Bursaries have been addressed through a number of initiatives including:

- categorisation of continuing students to enable a staggered application invite schedule in accordance with income evidence required
- proactive communications to students and HEIs to encourage applications to be submitted in line with specified deadlines
- Student Bursaries Improvement Programme to address service improvements across nine different elements
- responding to customer feedback to improve the applications process

Copies of the March 2014 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:

- a number of student payments missed the deadline due to the payment extract timing in relation to the upload of enrolment confirmation
- a small number of Disabled Students Allowance (DSA) payments and complaints were responded to outside of KPI target due to error within the BOSS reporting suite and administrative errors
- backlog of work items during June in respect of amendments to withdrawals, suspensions and extensions
- system issue in relation to processing changes of circumstance

Social Work Bursaries

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

- a single payment deadline was missed due to late notification of a change in programme start date at one HEI
- late payment to one student due to a FEAST system anomaly

Social Work Education Support Grant

All KPIs were delivered on target during 2013/14.

3. Quality Improvements

Improving services for our customers and clients remains at the heart of Student Services. 2013/14 has seen a number of quality improvements as detailed in the following sections.

NHS Student Bursaries

Through the Student Bursaries 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:

Process Overview	<ul style="list-style-type: none"> Revised invite process Revised service process maps Stakeholder journey map
Metrics	<ul style="list-style-type: none"> K2 management reporting improvements Management dashboard
System changes	<ul style="list-style-type: none"> System amendment for pro rata non-means tested grant payments Revisions to BOSS hint text System amendments for scheme rule changes
Customer calls	<ul style="list-style-type: none"> Root cause analysis of call volumes and reasons Implementation of status update emails
Childcare	<ul style="list-style-type: none"> Childcare booklet published Proposal for childcare allowance reconciliation in progress
Disabled Students Allowance	<ul style="list-style-type: none"> DSA guide in progress DSA discussion paper in progress to discuss with clients the potential alignment of SB and SWB
Complaints	<ul style="list-style-type: none"> Root cause analysis in progress
Fraud, Error and Debt	<ul style="list-style-type: none"> Strategy in progress Counter-fraud flat file provided to NHS Protect Business case for ID scanners in progress Review of fraud prevention by local counter fraud specialist Fraud awareness sessions delivered to staff
HEI interactions	<ul style="list-style-type: none"> HEI portal requirements and design in progress HEI dummy account implemented HEI email accounts implemented HEI direct helpline reinstated BUR forms revised HEI forms guide published Revised forms for PPE implemented
Internal knowledge base	<ul style="list-style-type: none"> Sherlock knowledge base system implemented
Website	<ul style="list-style-type: none"> Website revisions in progress Ask Us facility implemented

Social Work Bursaries

As part of our business as usual work and also as a result of recent policy change, the SWB team have introduced a number of quality improvements as follows:

Process Overview	<ul style="list-style-type: none">• Revised service process maps• Stakeholder journey map• Redesigned capping process after end-to-end review• Implemented new manual workaround for end-on students after BIS rate change
Metrics	<ul style="list-style-type: none">• MI reporting improvements
Customer calls	<ul style="list-style-type: none">• Root cause analysis of call volumes and reasons• Implemented process for updating payment information via Facebook• Facebook information now more proactive and timely following feedback from customers
Disabled Students Allowance	<ul style="list-style-type: none">• DSA guide published• DSA discussion paper in progress to discuss with clients the potential alignment of SB and SWB
Fraud, Error and Debt	<ul style="list-style-type: none">• Strategy in progress• Review of fraud prevention by local counter fraud specialist• Fraud awareness sessions delivered to staff
HEI interactions	<ul style="list-style-type: none">• Updated HEI contact lists, including specific contacts to ensure correct person each time• Redesigned SWESG spreadsheets for HEI use• Redesigned capping spreadsheets for HEI use
Internal knowledge base	<ul style="list-style-type: none">• Sherlock knowledge base reviewed, audited and updated• SWESG Work Instruction Notes compiled
Website	<ul style="list-style-type: none">• Website revisions in progress• Ask Us facility implemented

Social Work Education Support Grant

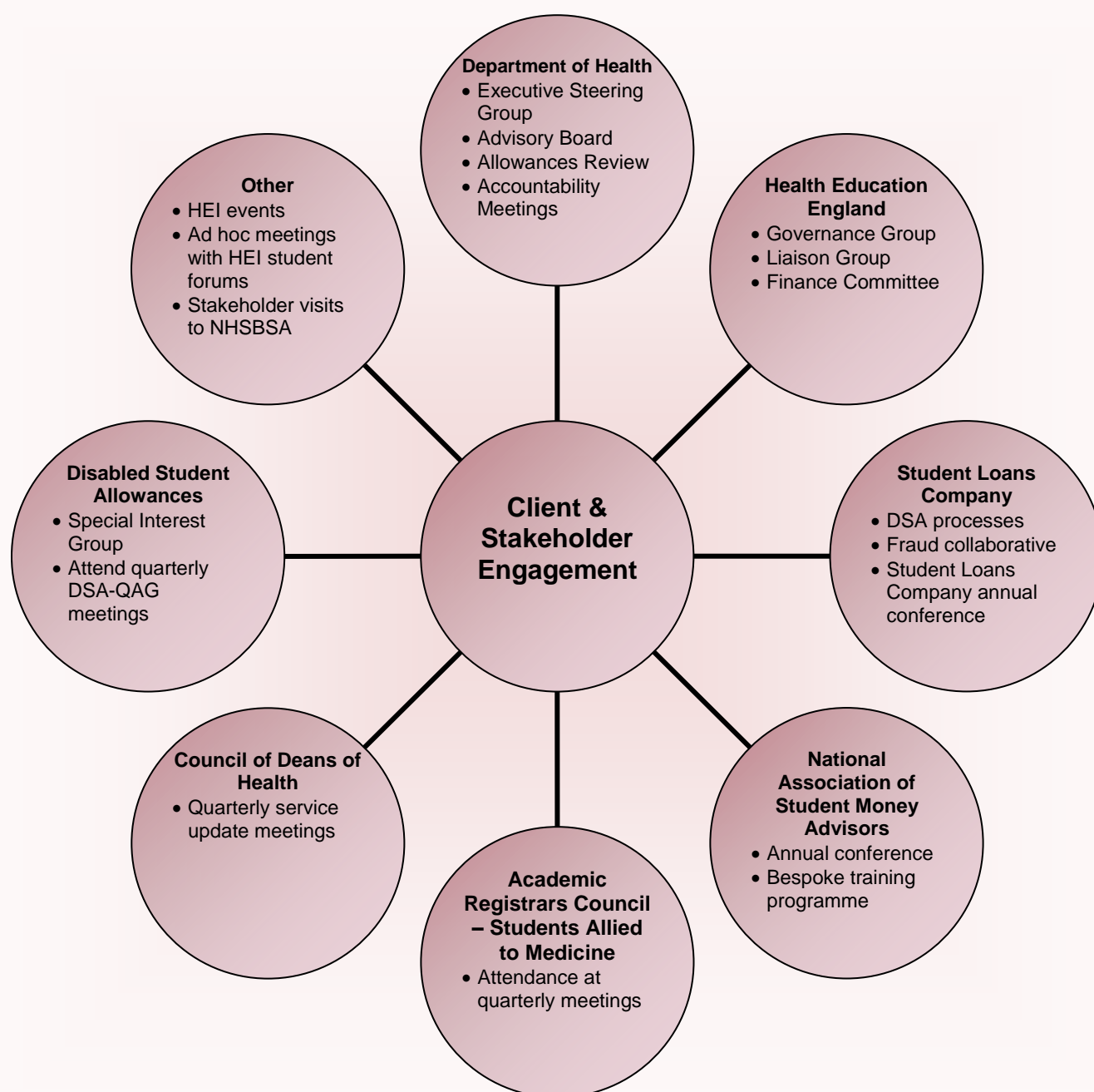
2013/14 saw the end of the first full yearly cycle of SWESG administration at the NHSBSA and we are currently reviewing the whole process to inform improvement suggestions to be implemented during the 2014/15 cycle.

One major improvement we have identified is a method to contact all students who have benefited from SWESG as part of the quality audit process via an online survey monkey. Previously only a small percentage of students were audited by the predecessor organisation prior to the NHSBSA taking over responsibility for the administration of the SWESG.

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 2013/14.



For 2014/15 we have an extensive plan for client and stakeholder engagement including:

- joint stakeholder events to be held twice yearly (April and October) for NHS Student Bursaries and Social Work Bursaries
- local events for Health Education England, the Local Education and Training Boards (LETBs) and associated HEIs
- further engagement with Student Loans Company to explore collaborative working opportunities

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

Ian Bryson led the Client & Stakeholder Engagement agenda from 2012/13 to 2013/14 and, through his considerable efforts and unstinting support, Student Services has in place a strong and productive relationship with clients and customers. Sadly, Ian died in June 2014, and the Student Services team along with everyone across the organisation wishes to acknowledge the significant contribution he made to the NHSBSA and Student Services.

Ian will be greatly missed by all of his colleagues.

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. Social Work Education Support Grant is not yet included in the customer surveys, but will be considered for inclusion in future surveys.

NHS Student Bursaries

Example findings from qualitative survey:

- Overall students were very happy and grateful to receive a student bursary
- Overall satisfaction with the application process was high
- Various different channels were used to find out about the student bursary
- The majority of students were unaware of the NHS Student Bursaries Facebook page, although some felt uneasy about joining the page due to wanting to keep personal and professional information separate
- Nearly all students were aware of the eligibility criteria, but there was confusion around how their entitlement was calculated
- The students were happy with the timings of their payments
- The helpline was seen to be very helpful and prompt in dealing with queries, although some students felt the advice given was sometimes inconsistent

Example findings from quantitative survey:

- University/college is the main way students find out about NHS Student Bursaries
- Satisfaction with aspects of the application process now have amber ratings compared to green ratings in previous years
- Satisfaction with politeness and helpfulness of staff remains high, rated green with amber ratings in relation to knowledge, time to answer call and ability to resolve query, dropping from green to amber ratings
- Overall satisfaction with most recent contact with NHS Student Bursaries is high
- Satisfaction with the notification process compared with previous surveys changed from green to amber ratings for all elements of the process

Social Work Bursaries

Example findings from qualitative survey:

- Overall students were very appreciative of their social work bursaries, with some feeling like the NHSBSA is 'doing them a favour'
- A number mentioned they would not have been able to study without the bursary or they would have had to seek part-time employment
- It was recognised that the bursary 'takes the stress away' for many mature students with families
- Students felt the NHSBSA and higher education institutions should work together to promote the availability of the social work bursaries in order to raise awareness
- Some students were unaware of the social work bursaries Facebook page
- Overall students were happy with the application process although some suggested an online application form would be a good idea
- The students were very positive when talking about their experiences when communicating with the NHSBSA
- Contact centre staff in particular received very positive feedback

Example findings from quantitative survey:

- University/college is the main way students find out about Social Work Bursaries and the website is the main source for finding out more information
- Almost a quarter of respondents are unaware how entitlement is calculated
- Satisfaction ratings with the application process are high, (all green) but no significant change compared to 2012; similarly, this has been the case in relation to satisfaction with the website
- Telephone is the most popular form of contact with a high proportion of queries resolved first time and high levels of satisfaction with most recent contact
- Mean satisfaction ratings are green for all elements of customer contact and again no significant change compared to 2012
- Satisfaction with assessment of award is similar to 2012 on the whole and all rated highly, (all green)

6. Activity

The following sections provide a detailed account of activity across the service streams for the 2013/14 financial year.

NHS Student Bursaries

In the financial year 2013/14 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 102,791 students in the year. Of these:

- 0.4% (approximately 400) fell under the Pre-2007 Scheme
- 52.8% (approximately 54,200) fell under the 2007-2012 Scheme
- 46.8% (approximately 48,100) 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 13th & 14th 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 bursary, 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 re-imbursment 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 2012/13 and 2013/14.

[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, payments totalled £452.2 million of which £193.8 million (43%) 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 2013/14 and [Appendix 13](#) provides a summary of all key work items processed in year.

Social Work Bursaries

The application window for social work bursary runs from 01 May to 30 November each year, with a delayed deadline of 28 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 14](#) provides a breakdown of applications received in 2013/14 clearly showing the seasonality of the work.

[Appendix 15](#) 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.

From August 2013 the Contact Centre began to collect information on the types of query that they were receiving from SWB customers. A breakdown of these query types is also included at [Appendix 15](#). The fact that there is only part-year data for 2013/14 and also that the capping process is still new, may have had an impact on

the percentages of query type received. In subsequent years we will have full year data.

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 16](#). Below is a summary of a high level analysis:

- of the 9963 bursary applications received, 6945 contained completed equal opportunities monitoring forms
- of these, 5584 stated that they wished to declare information
- of these, 1361 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 17](#).

Social Work Education Support Grant

During 2013/14, the NHSBSA made payments to 83 HEIs covering approximately 417,000 placement days and a contribution to service user and carer involvement (Service User Funding).

7. Income and Expenditure

NHS Student Bursaries

The final draft of the 2013/14 national operational NHS Bursary expenditure forecast amounted to £441.2 million. The final outturn was 0.35% higher at £442.8 million.

Budget forecasts were produced incorporating the following general factors:

- the forecasts are based on SB bursary population data
- adjustments have been made by SB for actual and projected in year activity changes relating to student withdrawals, students resuming training, and attrition, based on previous year records. Information received from HEIs regarding courses which have been withdrawn and new courses commencing has also been incorporated into the model. Adjustments have been made to the forecast student numbers to reflect these changes
- SB has projected costs using average bursary costs in the current year applicable to individual LETBs
- changes in commissioning for new students in the 2013/14 academic year have been incorporated into the model using 2012/13 actual students numbers and commissioning information submitted by LETBs; this includes:
 - variations in future commissions as compared to student numbers built into model
 - variations in attrition levels as compared to plan for 2012/13 intakes
 - the full year effect of the further movements from diploma to degree programmes

Social Work Bursaries

Total Social Work Bursary expenditure in the 2013/14 financial year was £70.7 million, the detail for which is provided in [Appendix 18](#). Expenditure fell compared to the previous year as first year undergraduate students are no longer in receipt of a bursary. Going forward, bursary expenditure will become increasingly tightly controlled as more cohorts (both at postgraduate and undergraduate level) become subject to capping criteria. Income assessed elements of the bursary will remain demand-led to a certain extent, and in 2013/14 the Adult Dependant Allowance and Childcare Allowance both showed a significant increase in expenditure.

Social Work Education Support Grant

Total SWESG expenditure in the 2013/14 financial year was £26.8 million and [Appendix 19](#) provides a breakdown. SWESG has, historically, been demand-led, in that it was dependant on the number of current students studying on social work courses in England, and therefore the expenditure increased with student numbers.

SWESG 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

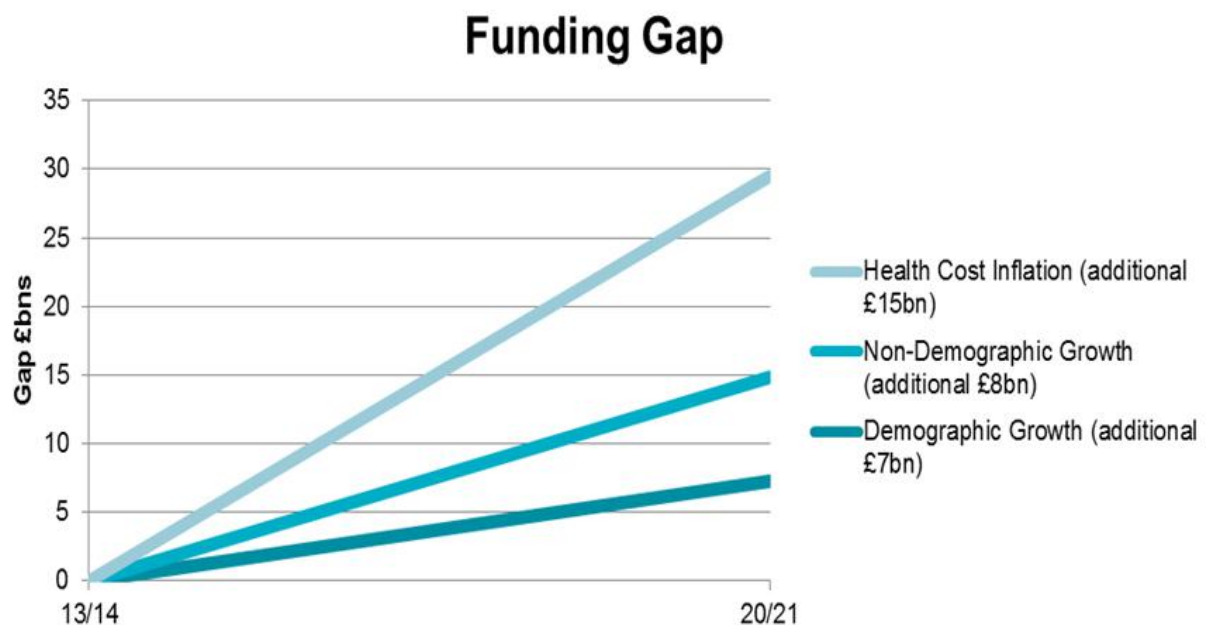
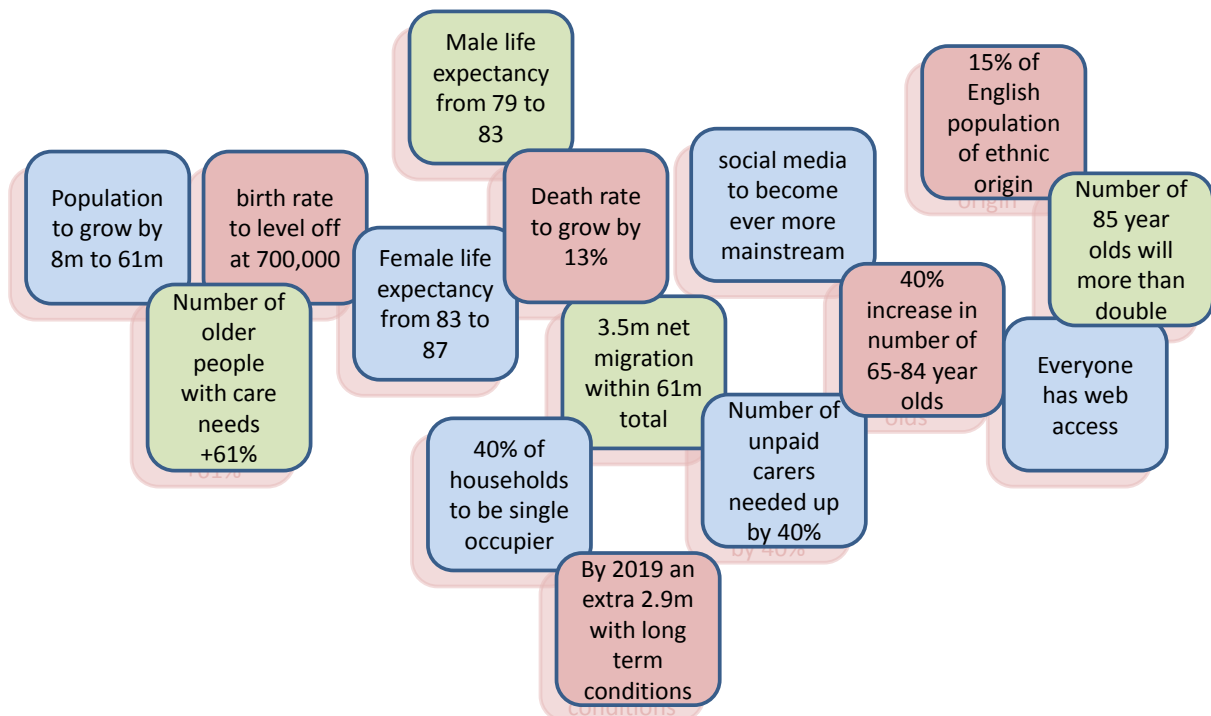
financial years. First instalments include half of the amount that HEIs have predicted that they will need within the academic year, plus any Service User Funding (SUF). The second instalment comprises the remaining estimated amount. Where HEIs have submitted inaccurate predictions, their funding the 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. We do not anticipate that there will be any future payments.

We are awaiting the outcome of the current SWESG consultation for any policy change that may have an effect on expenditure, but we anticipate that it will be more tightly controlled in future.

8. Looking Forward

2014/15 and beyond pose major challenges for the health sector in respect of changing demographics and the projected funding gap to 2020/21.



Source: 'A Call to Action', NHS England, July 2013

The NHSBSA has developed its 2014-2019 strategy which sets out challenging goals that will enable the organisation to continue to deliver the services whilst supporting the wider health sector to deliver the overall challenges.



For Student Services, we have commenced a strategic change programme designed around delivering the organisational goals and supporting clients in delivering the wider workforce and education agenda alongside responding to customer requirements. The programme includes:

- development of a Strategic Technology Solution as replacement for current system used in Social Work Bursaries
- making forward the actions required from our Fraud, Error and Debt Strategy aiming to detect, prevent and deter fraud, eliminate errors as far as possible and ultimately reduce the current levels of debt
- work with Health Education England and Department of Health clients to support delivery of their respective business plans
- continue to act on customer insight to make service improvements
- enable flexible workforce solutions to match operational demands in line with the academic cycle

We look forward to continued working with clients and customers to drive our change programme and deliver further improvements to our services.

9. Appendices

Appendix 1 – NHS Student Bursary Rates

Table 1A. Bursary Rates: Gross Annual Amounts Payable 1 April 2013 to 31 August 2013

	Pre-2007 Scheme		2007-2012 Scheme		2012 Scheme
	Mainstream Students (£)	Traditional Diploma Students (£)	Mainstream Students (£)	Traditional Diploma Students (£)	All Students (£)
Basic Award – Parental Home	2,084	6,438	2,346	6,701	2,163
Basic Award – Lodgings Rate	2,548	6,438	2,810	6,701	2,591
Basic Award – London Lodgings Rate	3,129	7,566	3,392	7,827	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	2,238	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 2013 to 31 March 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

Appendix 2 – NHS Student Bursary Eligible Professions

Table 2A. 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

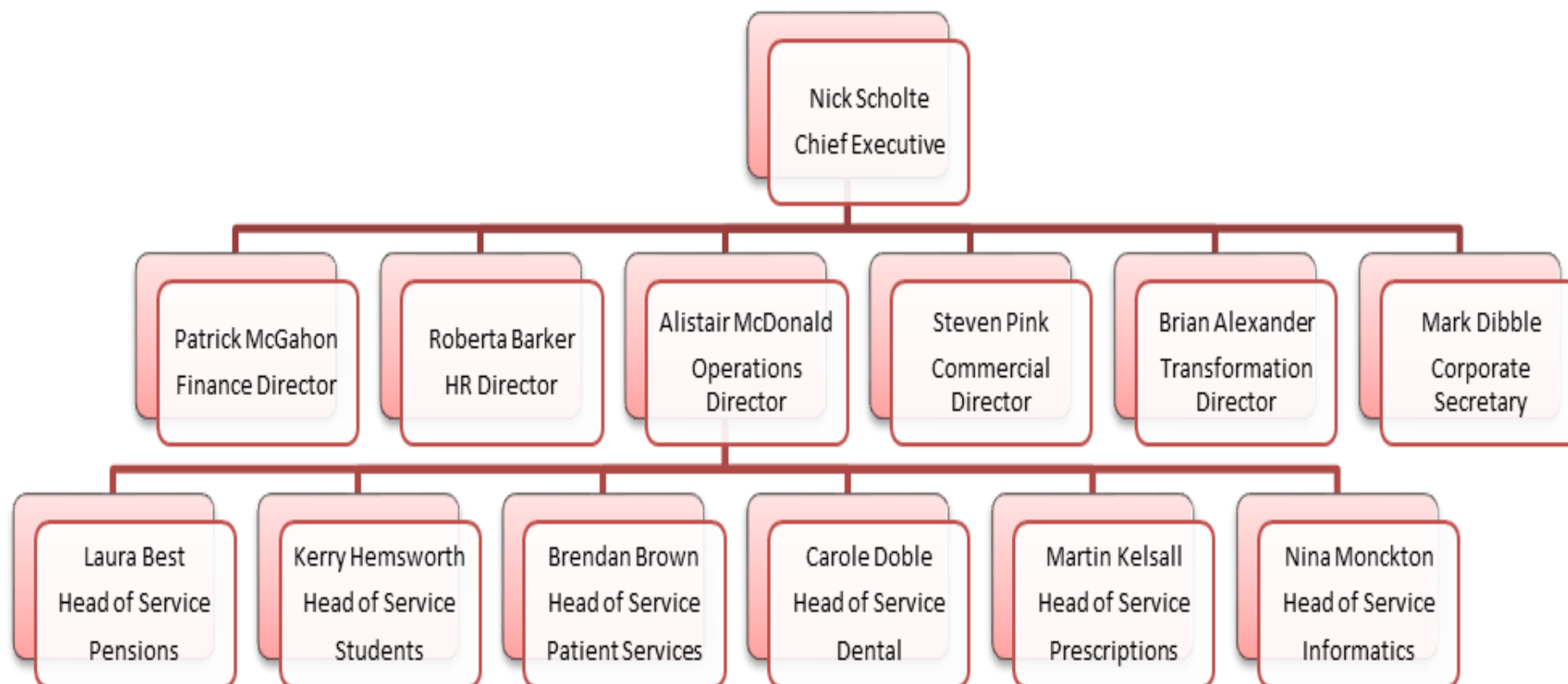
Appendix 3 – Social Work Bursary Rates

	Studying in London (£)	Studying outside London (£)
Undergraduate students:		
Basic bursary	4,975	4,575
Basic bursary: Part-time courses	Pro-rata rate based on duration of course	
Placement Travel Allowance	862.50	
Basic grant: non-VTF courses	3,475	3,075
Postgraduate students:		
Basic bursary	3,762.50	3,362.50
Maintenance grant	4,026	2,608
Placement Travel Allowance	862.50	
Adult Dependant's Allowance	2,642	
Parents' Learning Allowance	1,508	
Childcare Allowance – One Child (85% of actual costs)	up to 175 per week	
Childcare Allowance – Two or more children (85% of actual costs)	up to 300 per week	
Part-time courses	All elements of Postgraduate bursary received at pro rata rate based on duration of course	
Disabled Students Allowance –	20,520	
Disabled Students Allowance –	5,161	
Disabled Students Allowance –	1,724	
Postgraduate course Tuition Fees	Up to 3,900	
Part-time Postgraduate course Tuition Fees	Up to 1,950	
Undergraduate non-VTF course Tuition Fees	Up to 1,380	
Undergraduate VTF course Tuition Fees	Included in basic bursary	

Appendix 4 – Social Work Education Support Grant Rates

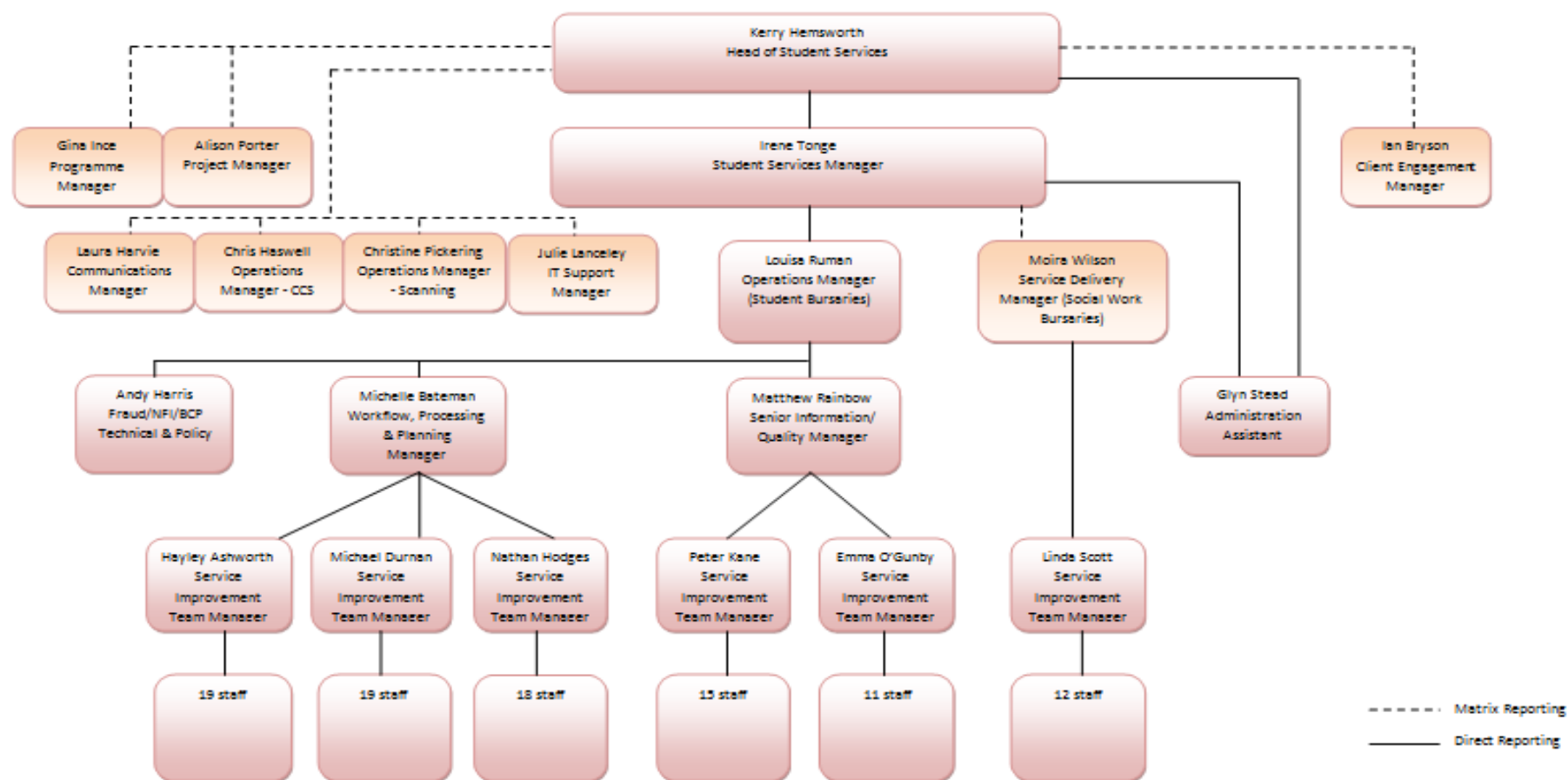
Daily Fee per student (£)	
Standard daily fee per student per day in standard placement	18
Daily fee per student per day where placement provider:	
Has charitable status	28
Has registered private company status	
Skills Development Days – fee per day	18
HEI Administration fee (£)	
Admin fee per student per day	2
Funding for involvement of people who use the services and their carers (£)	
A one-off payment to each HEI per annum	7,400

Appendix 5 – NHSBSA Senior Management Structure

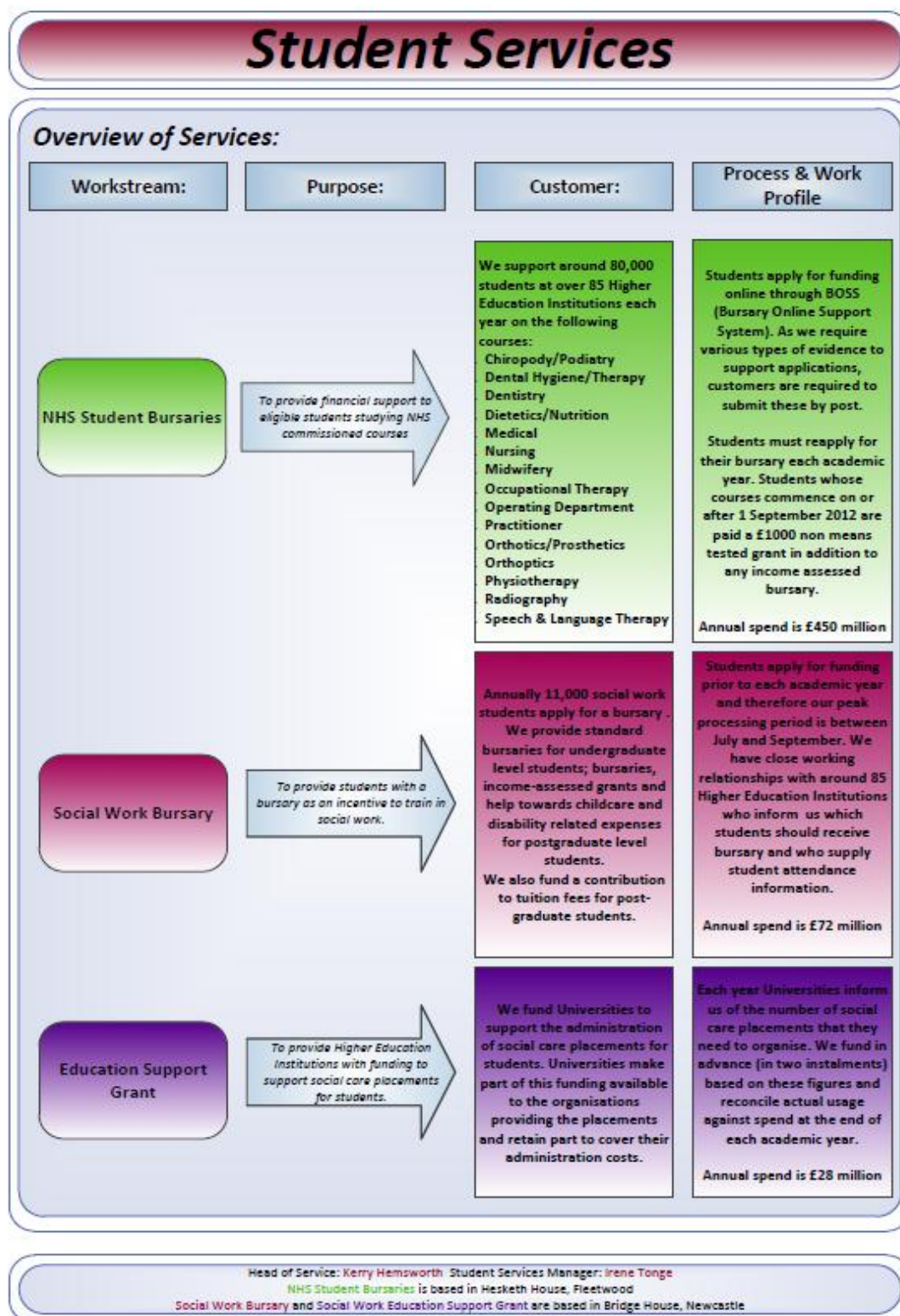


Appendix 6 – Organisation Chart

STUDENT SERVICES ORGANISATION CHART



Appendix 7 – Student Services Overview

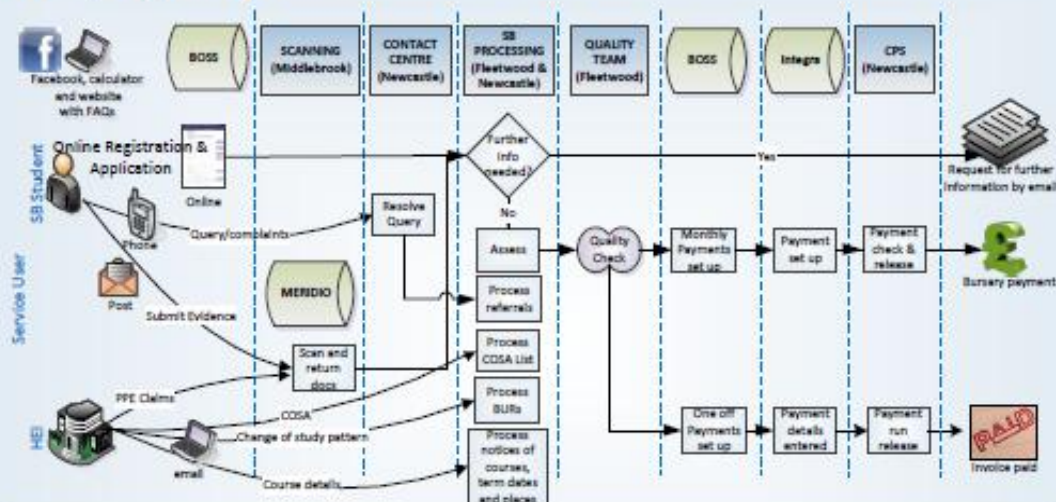


Student Services – NHS Student Bursaries

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, Dependents' 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 enquiries are taken by Contact Centre Services in Bridge House, Newcastle. Headline costs of the service are: £2.03m staff and £0.52m non-staff budget per year.

Glossary:
BOSS – Bursary Online Support System
CPS – Finance Team
HEI – Higher Education Institution
Integra – Financial System
Meridio – Document Management System

Awards/Payment Types:
Basic Bursary Award
Non Means Tested Grant
DSA – Disabled Students Allowance
Dependents/Childcare Allowances
PPE – Practice Placement Expenses

Miscellaneous Work Items:
CoC – Change of Circumstances
Extra Weeks
Tuition Fees
COSA – Confirmation of Student Attendance
BURs – Bursary forms from HEIs

Service User Profile:

During 2013-14 we processed 94,512 applications:

New Student applications: 29,837
Continuing Student applications: 65,910

Medical & Dental Student applications: 12,366
Dependents Allowance: 18,441
Childcare Allowance: 10,082
Disabled Students Allowance: 4,250
Practice Placement Expenses: 23,606
Change of Circumstances: 13,354

Performance Profile:

Performance against SLAs are as follows:

Application assessed within 20 days: >99%
Dependents Allowance assessed within 20 days: 100%
CoC processed within 20 days: >95%
PPE claims processed within 20 days: >99%
DSA applications processed within 10 days: >98%

We achieve an absolute cash variance accuracy rate of >99%

Future developments:

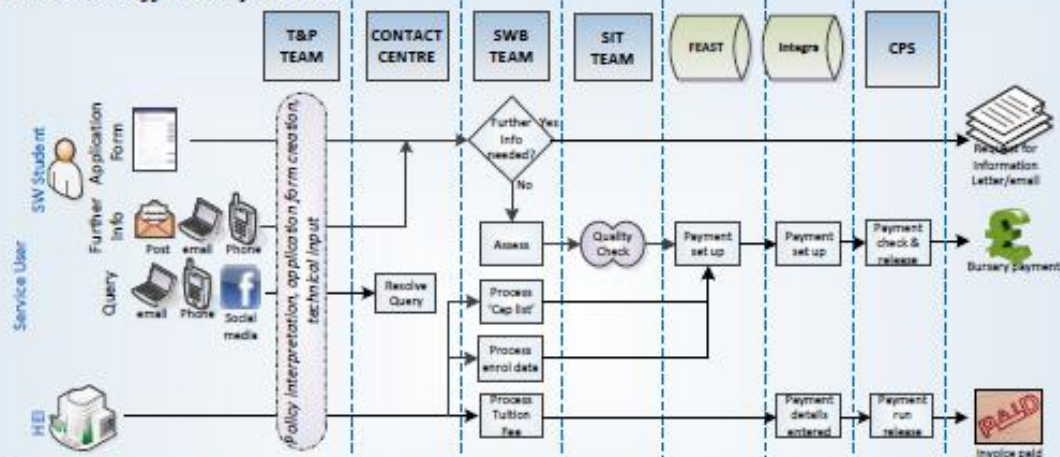
A Student Bursaries Improvement Programme has been delivered during 2013-14 following an end-to-end service review during 2012-13. This has delivered several service improvements for the benefit of the service and the customer. Future improvements will include further system enhancements, a focus on reducing fraud, error and debt and pursuing links with wider government agencies.

Head of Service: Kerry Hemsworth Student Services Manager: Irene Tonge Operations Manager: 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 submit 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:



SWB applications are assessed on one team within Bridge House (around 14 staff). Additionally, general queries from customers are taken by the Customer Contact Centre.

Headline costs of the service are: £301K staff, and £20K non-staff budget per year.

Glossary / Acronyms:

SWB: Social Work Bursary

HEI: Higher Education Institution (University)

FEAST: Further Education and Student Technology System

Integra: NHSBSA Payment system

T&P: Technical & Procedural Team

CPS: Payment Team (Based in Stella House)

SIT: Service Improvement Team

Service User Profile:

During 2013-14 we received:

11,025 applications, broken down as follows:

Postgraduate student applications: 4080

Undergraduate student applications: 6157

Childcare Allowance: 408

Disabled Student Allowance: 380

We also answered 46311 queries from students, carried out 644 withdrawn student reassessments and made 55,000 BACs payments.

Performance Profile:

Team Performance against SLAs are as follows:

Process bursary applications within 20 days: 100%

Process Childcare applications within 3 days: 100%

Prepare payments to students within 3 days: 100%

We achieve an assessment accuracy rate of over 99%

Our Cash Variance accuracy rate for 2013-14 was 99.6%

Links with other BSA services:

SWB links directly with ESG as we can use student information submitted from HEIs interchangeably. We designed the workflow profile of ESG to dovetail with that of SWB.

Future developments:

In 2012, DH reviewed the Social Work Bursary in consultation with various social care, higher education and student organisations.

The outcome was a change to the bursary administration process, with a cap on the number of students who would receive a full bursary each year. HEIs are now responsible for identifying which students should receive a bursary, and the SWB team now work closely with HEIs to ensure this new process is as seamless as possible for the students.

DH is considering further changes to the bursary including widening income assessments.

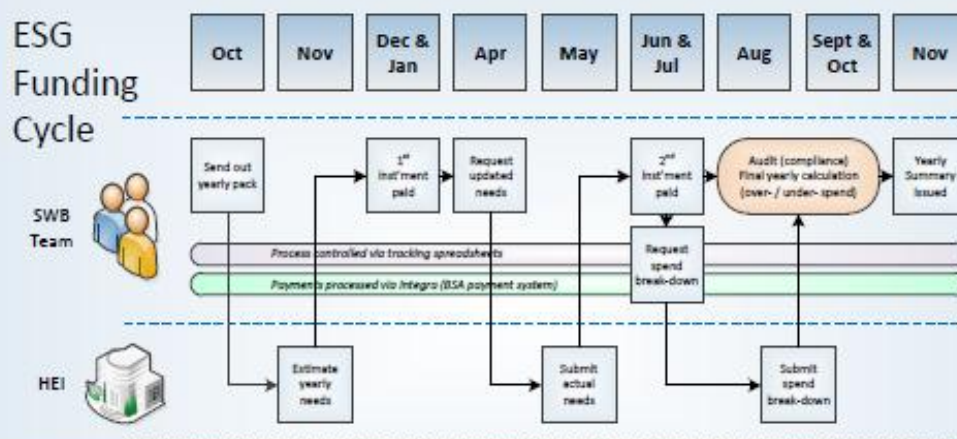
Head of Service: Kerry Hemsworth Student Services Manager: Irene Tonge Service Delivery Manager: Moira Wilson

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

Student Services Social Work Education Support Grant

NHSBSA assumed responsibility for the administration of the Social Work Education Support Grant (SWESG) as from August 2012. The SWESG 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:



SWESG is processed by the SWB team in Bridge House. As it is a small, specialist work-stream, all customer queries are dealt with by the SWB team, they are not routed through the Contact Centre. The team maintain close working relationships with individuals within each of the 85 HEIs who receive funding through ESG. Headline costs of the service are included in SWB.

Glossary / Acronyms:

SWB: Social Work Bursary
Integra: NHSBSA Payment system

HEI: Higher Education Institution (University)

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:

In 2013-14 we completed our first full year of administration and have therefore made two main payments to each of our HEI customers.

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.

Links with other BSA services:

SWESG links directly with SWB as we can use student information submitted from HEIs interchangeably. We designed the workflow profile of ESG to dovetail with that of SWB.

Future developments:

A review of SWESG expenditure has commenced led by DH. A 12 week consultation took place in Autumn 2013, the outcomes from which will be implemented in academic year 2014-15.

Head of Service: Kerry Hemsworth Student Services Manager: Irene Tonge 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	Total Paid (£000s)	% of All Professions Paid	Average Paid per Student (£)
Medical & Dental	9,967	23,425	9.70%	
<i>Of which:</i>				
Medicine	8,742	21,001	8.50%	2,402
Dentistry	1,225	2,423	1.19%	1,978
Nursing & Midwifery	69,931	320,586	68.03%	
<i>Of which:</i>				
Nursing	62,396	285,261	60.70%	4,571
Midwifery	7,535	35,325	7.33%	4,688
Allied Health Professions	19,509	55,697	18.98%	
<i>Of which:</i>				
AHP Foundation	62	220	0.06%	3,542
Chiropody	1,207	3,774	1.17%	3,126
Dietetics	1,202	3,361	1.17%	2,796
Occupational Therapy	5,016	15,830	4.88%	3,155
Orthoptics	272	599	0.26%	2,200
Physiotherapy	4,785	11,092	4.66%	2,318
Prosthetics & Orthotics	125	341	0.12%	2,727
Radiography	3,747	12,186	3.65%	3,252
Radiotherapy	818	2,611	0.80%	3,191
Speech & Language Therapy	2,275	5,685	2.21%	2,498
Professions Complementary to Dentistry	673	2,102	0.65%	
<i>Of which:</i>				
Dental Hygiene	129	389	0.11%	3,015
Dental Hygiene & Dental Therapy	507	1,581	0.49%	3,118
Dental Therapy	37	132	0.05%	3,565
Other Professions	2,711	10,114	2.64%	
<i>Of which:</i>				
Audiology	253	369	0.25%	1,460
Operating Department Practitioner	2,139	9,152	2.08%	4,278
Health Professional	319	592	0.31%	1,856
All Professions	102,791	411,924	100%	

Appendix 9 – SB Expenditure: National Summary by Award Element

Scheduled Monthly Payments		
Award Element	Number	Amount Paid (£000s)
Basic Award ¹	90,655	193,789
Childcare Allowance	10,082	32,174
Dependants Allowance	18,441	35,767
Extra Weeks Allowance	79,726	76,114
Non Means-Tested Grant ²	48,368	35,398
Older Students Allowance ³	26	17
Parent Learning Allowance ⁴	18,389	14,944
Single Parent Addition ²	3	1
Total (Monthly Payments)	265,690	388,204
One-off Payments		
Award Element	Number	Amount Paid (£000s)
Disabled Students Allowance	4,250	10,423
Extensions	511	838
Hardship Fund ⁵	2	4
Initial Expenses ⁶	2	0
Practice Placement Expenses	25,606	11,717
Tuition Fees ⁵	11,845	40,230
Other	1,069	738
Total (One-off Payments)	43,285	64,019
Grand Total – All Elements⁷	308,975	452,223

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

² 2012 Scheme students only.

³ Not applicable to 2012 Scheme students.

⁴ 2007-2012 & 2012 Scheme students only.

⁵ Medical & Dental students only.

⁶ Traditional Diploma students only.

⁷ The difference to Appendices 10 and 11 is due to payments being made by the BOSS system but not yet crediting a live student account

Appendix 10 – Expenditure: Summary by Professional Group: Financial Years 2004/05 to 2013/14

Financial Year Professional Group	2004/05 (£000s)	2005/06 (£000s)	2006/07 (£000s)	2007/08 (£000s)	2008/09 (£000s)	2009/10 (£000s)	2010/11 (£000s)	2011/12 (£000s)	2012/13 (£000s)	2013/14 (£000s)
Medical & Dental	11,504	21,090	28,447	30,452	34,012	35,198	49,788	52,199	61,409	63,635
Nursing & Midwifery	333,539	358,272	370,664	370,858	369,762	385,721	399,366	385,371	349,453	320,586
Allied Health Professions	41,264	45,482	48,778	47,800	46,285	47,737	50,296	50,275	52,759	55,697
Professions Complementary to Dentistry	1,075	1,425	1,558	1,675	1,636	1,606	1,744	1,886	1,863	2,102
Other Health Professions	5,784	9,127	11,934	14,714	16,766	19,270	20,262	19,692	16,735	10,114
Total	393,166	435,395	461,380	465,499	468,461	489,533	521,456	509,422	482,219	452,134

Appendix 11 – Expenditure: Summary by Award Element: Financial Years 2004/05 to 2013/14

Financial Year Award Element	2004/05 (£000s)	2005/06 (£000s)	2006/07 (£000s)	2007/08 (£000s)	2008/09 (£000s)	2009/10 (£000s)	2010/11 (£000s)	2011/12 (£000s)	2012/13 (£000s)	2013/14 £000s
Basic Award	301,259	315,551	323,824	322,994	324,771	337,862	343,363	318,061	258,840	193,789
Childcare Allowance	6,992	17,726	22,589	26,249	26,009	29,039	32,724	33,838	33,507	32,174
Dependants Allowance	25,461	28,143	30,506	32,101	33,755	36,528	38,960	39,370	37,964	35,767
Extra Weeks Allowance	20,428	23,031	26,176	27,690	29,518	33,640	39,258	47,677	61,355	76,114
Older Students Allowance	20,170	21,649	22,209	18,245	10,896	4,524	1,001	256	57	17
Non Means-tested Grant	0	0	0	0	0	0	0	0	11,830	35,398
Parent Learning Allowance	6,909	8,283	8,691	8,920	8,978	9,271	11,077	10,792	11,137	14,944
Single Parent Addition	6,117	6,844	7,272	6,429	4,023	1,842	145	92	17	1
Disabled Students Allowance	3,694	4,516	6,178	6,684	6,879	7,993	8,647	8,641	9,072	10,422
Extensions	945	1,551	1,633	1,665	1,714	1,639	1,738	2,056	2,088	838
Hardship Fund	0	0	0	4	6	4	8	7	6	4
Initial Expenses	960	988	949	888	904	878	805	326	29	0
Practice Placement Expenses	6,909	8,283	8,691	8,920	8,978	9,271	11,077	10,792	11,137	11,717
Tuition Fees	N/A	6,829	11,141	11,237	13,814	14,046	27,560	30,312	38,442	40,211
Other	221	273	197	156	162	141	145	1,386	1,684	738
Total	393,166	435,395	461,380	465,499	468,461	489,533	521,456	509,422	482,219	452,134

Appendix 12 – SB Activity: Total Applications Approved¹ by Profession

Profession	New Students	Continuing Students	Total
AHP Foundation	0	35	35
Audiology	5	127	132
Chiropody	374	729	1,103
Dental Hygiene	24	42	66
Dental Hygiene & Dental Therapy	209	385	594
Dental Therapy	21	40	61
Dentistry ²	0	1,315	1,315
Dietetics	393	940	1,333
Medicine ²	0	11,051	11,051
Midwifery	2,438	4,409	6,847
Nursing	19,753	35,252	55,005
Occupational Therapy	1,556	3,072	4,628
Operating Department Practitioner	922	885	1,807
Orthoptics	106	168	274
Physiotherapy	1,684	3,077	4,761
Prosthetics & Orthotics	33	68	101
Radiography	1,239	2,167	3,406
Radiotherapy	333	458	791
Speech & Language Therapy	747	1,690	2,437
Total	29,837	65,910	94,512

¹The number of applications approved is not the number of NHS Bursary holders in training. ²No figures are given for Dentistry or Medicine as the 1st year of funding for such students is normally provided by DBIS

Appendix 13 – SB Activity: Key Work Items Processed

Work Item	Processed
HEI Notification of Withdrawal, Resumption or Extension	26,557
Contact Centre Services (Student Helpline) Referrals	34,212
HEI Referrals (Emails and Correspondence)	18,565
Student Change of Circumstances	15,554
General Correspondence	19,467
Integra Invoices (Tuition Fees and DSA)	30,853
Complaints	874
Practice Placement Expenses claims	62,014
Disabled Student Allowance claims or associated correspondence	23,174

Source: Divisional Plans

Appendix 14 – SWB Applications Information

Table 14A. Number of applications per award element.

Award Element/Transaction Type		
New postgraduate students		1,668
	Of which, bursary in payment	1,458
	Of which, PTA only	214
Continuing postgraduate students		1,902
New undergraduate students		0
Continuing undergraduate students		6,157
Child Care Allowance applications		408
Disabled Student Allowance applications		380
Number of BACs payments		55,000
Number of new student debtors (withdrawal calculations)		589
Reassessments due to provisional awards		115
Queries from students via Contact Centre		46,511
Tuition fee invoices processed		3,570

Table 14B. Number of applications per month.

	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Total
Bursary applications	2	1	3214	2400	1888	1699	636	245	30	13	11	1	10140
DSA applications	8	19	27	45	32	55	70	25	16	12	11	16	336
Childcare applications	16	20	26	85	79	125	99	29	19	25	22	23	568
Correspondence	520	598	94	121	95	135	193	102	1339	226	11	154	3588

Appendix 15 – SWB Queries

Table 15A. Number of telephone, email, written and Facebook queries 2013/14

	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Total
Calls to CCS	2267	2346	2780	2692	3285	4511	4352	1596	877	1617	1119	1	27443
Emails to CCS	365	294	375	356	354	531	472	306	165	302	288	349	4157
Facebook queries	98	139	177	165	213	260	167	48	38	180	116	190	1791
Emails to SWB team	622	572	557	878	575	968	1223	641	623	669	538	678	8544
Other correspondence	520	9	160	254	185	259	283	128	1438	312	129	342	4019

Table 15B. Breakdown of types of query.

From August 2013 Contact Centre Services (CCS) started to categorise the types of query received by phone. The figures below show the breakdown of the types of query received between August and 31 March 2014. This data will be available for the complete year going forward.

Type of query	
Assessment – how it works	19.21%
Payment Query	15.76%
Other	14.37%
Capping methodology	10.94%
Childcare allowance queries	6.73%
Application form completion	6.47%
DSA	4.94%
Enrolment query	4.12%
Prospective Students	3.46%
Eligibility for bursary	3.42%
Reference Number	2.78%
Overpayment queries	2.22%
Extended Funding	2.21%
Repeat Funding	2.04%
Change of address notification	1.02%
Provisional Assessments	0.34%

Appendix 16 – SWB Equal Opportunities Monitoring

Questions asked with % of respondents:			
Gender		99.96%	
Age Group		99.93%	
Ethnic Group		98.07%	
Religion		94.91%	
Sexual Orientation		94.61%	
Disability		93.91%	
What is your gender?		Which of the following best describes your sexual orientation?	
Female	85.14%	Heterosexual / Straight	88.72%
Male	14.82%	Lesbian / Gay	2.29%
Unanswered	0.04%	Bisexual	1.43%
		Prefer not to say	2.11%
		No answer	5.45%
Which age group applies to you?		Are you a disabled person as defined by the Equality Act 2010? (from those who answered 'Yes' [751 out of 5,524 who answered this question])	
16-24	30.23%	Learning disability / difficulty	47.80%
25-34	37.61%	Longstanding illness	17.18%
35-44	21.93%	Mental health problem	7.06%
45-54	9.35%	Sensory impairment	6.39%
55-64	0.77%	Mobility impairment	5.99%
65+	0.04%	Physical impairment	2.13%
No answer	0.07%	Other	4.93%
		No condition given	10.39%
What is your ethnic group?		What is your religion or belief?	
British	68.71%	Christian	48.55%
African	14.67%	None	39.97%
Caribbean	3.96%	Islam/Muslim	3.35%
Pakistani	1.72%	Sikh	0.82%
Indian	1.65%	Hindu	0.54%
White and Black Caribbean	1.59%	Buddhist	0.48%
Irish	0.86%	Other	0.98%
Other	3.06%	Unanswered	5.31%
Unanswered	3.78%		

Appendix 17 – SWB Applications Breakdown

Table 17A. Bursary applications by academic level 2013/14 (academic year).

Academic level	Total bursary applicants	Of which part time
Postgraduate	4080	134
Undergraduate	6290	213
Total	10370	347

Table 17B. Bursary applicants by year and level of study.

		2010/11		2011/12		2012/13		2013/14	
		UGD	PGD	UGD	PGD	UGD	PGD	UGD	PGD
Year of study	1	3857	1757	3833	1968	3299	1943	35	1843
	2	3187	1196	3561	1583	3265	1801	2778	1948
	3	2914	138	2925	166	3082	196	2982	230
	4	255	19	373	34	445	42	406	34
	5	38	6	66	6	84	12	61	10
	6	10	1	16	4	19	6	17	10
	7	3	-	6	-	13	4	11	5
Total		10264	2785	10780	3241	10207	4004	6290	4080
		13366		14021		14211		10370	

Table 17C. Bursary applicants by age 2013/14.

Age at start of academic year	Number of bursary applicants	% of total
Under 21	667	6.43%
21 – 25	2723	26.26%
26 – 30	2250	21.70%
31 – 35	1577	15.21%
36 – 40	1261	12.16%
41 – 45	944	9.10%
46 – 50	651	6.28%
51 – 55	225	2.17%
56+	72	0.69%
Total	10370	

Table 17D. Bursary applicants by gender 2013/14.

Gender	Number of bursary applicants	% of total
Female	8778	84.65%
Male	1592	15.35%
Total	10370	

Appendix 18 – SWB Expenditure

Table 18A. Social Work Bursary expenditure in the 2013/14 financial year broken down by element

Non income-assessed bursary		Income-assessed allowances				Other	
UG basic grant (£000s)	PG basic grant (£000s)	Maintenance Grant (£000s)	Adult Dependent Allowance (£000s)	Parents Learning Allowance (£000s)	Childcare Allowance (£000s)	Disabled Students Allowance (£000s)	Tuition Fees (£000s)
33,121	11,325	8,522	355	1,019	1,814	674	13,883

Table 18B. Comparison of 2013/14 expenditure to previous years.

	Student Bursary spend (£000s)	DSA supplier spend (£000s)	Tuition Fee spend (£000s)	Total (£000s)	% year on year increase	Cumulative % increase
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%

Appendix 19 – SWESG Expenditure

Table 19A. SWESG transactions.

Payment of SWESG to HEIs	
First instalment	85
Second instalment	85
Students funded	13,678
Audit checks	1,370

Table 19B. SWESG Expenditure.

Social Work Education Support Grant						
Academic Year	2011/12 (£000s)		2012/13 (£000s)		2013/14 (£000s)	
	1 st instalment	2 nd instalment	1 st instalment	2 nd instalment	1 st instalment	2 nd instalment
Placement Fees	13,788	13,160	14,084	11,241	11,563	11,563
HEI Admin Fees	1,217	1,151	1,251	1,082	1,154	1,154
Skills Development Days	0	0	198	58	1,158	1,158
Service User & Carer Funding	606	0	607	0	599	0
Totals	15,611	14,311	16,140	12,381	14,474	13,875

Table 19C. GVO funding.

Grants for Voluntary Organisations funding			
Academic Year	2011/12 (£000s)	2012/13 (£000s)	2013/14 (£000s)
Total	176	51	11

Table 19D. SWESG total expenditure.

Total Expenditure			
Financial Year	2011/12 (£000s)	2012/13 (£000s)	2013/14 (£000s)
Total	29,426	30,502	26,868