



**Programme for Access to Higher Education (PATH)  
Strand 2**

**1916 Bursary Fund**

for students from priority groups identified as currently being under-represented in higher education

**Implementation Guidelines 2024/25**



**Rialtas na hÉireann**  
Government of Ireland



Arna chomhchistiú ag  
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## **1. Overview of the 1916 Bursary Fund**

### **1.1. Background to PATH**

The fourth [National Access Plan: A Strategic Action Plan for Equity of Access, Participation and Success in Higher Education 2022-2028](#), to be known as the 'National Access Plan (NAP)', was published in August 2022.

The NAP identifies three main target groups (students who are socioeconomically disadvantaged, students who are members of Irish Traveller and Roma communities, and students with disabilities including intellectual disabilities), but within those groups it recognises that students experiencing socioeconomic disadvantage may come from various backgrounds including:

- Students from low-income families and/or who are long-term social welfare dependent
- Students from socioeconomically disadvantaged areas
- Students who are mature and have never previously accessed higher education
- Students who are mature and who previously attended higher education but did not complete a course (that is, 'second-chance' mature students).
- Students who are lone parents or teen parents
- Students who are migrants or refugees or who have experience of the international protection process, or students from ethnic minorities
- Students who have experience of the care system
- Students who are survivors of domestic violence
- Students who are carers
- Students who have experienced homelessness
- Students who have experience of the criminal justice system

The Programme for Access to Higher Education (PATH) fund was established in 2016 to support innovative approaches to deliver the ambitions, goals, objectives, actions, and targets of National Access Plans. PATH is a multi-strand initiative and complements existing student supports and access initiatives available for students who are most socioeconomically disadvantaged. The five strands of PATH demonstrate the Government's prioritisation of, and commitment to, supporting and further developing equity of access to higher education.

It is envisaged that the impact of PATH will be long-lasting and ensure better targeting of the most disadvantaged groups in Irish society. An independent impact assessment of PATH Strands 1, 2 & 3 concluded in Q2 2024, and its findings and recommendations will inform the future development of PATH.

### **1.2. History of the 1916 Bursary Fund**

The PATH 2 – 1916 Bursary Fund is a strand of the Programme for Access to Higher Education. The objective of the 1916 Bursary Fund is to encourage participation and success in higher education by students who are the most socioeconomically disadvantaged and who are from communities significantly under-represented in the student body availing of higher education (see section 2.1.1).

PATH 2 is a key implementation component of the current NAP (2022-2028) and increasing the number of PATH bursaries available is a Key Performance Indicator (KPI). The PATH 3 strand (Higher Education Access Fund) supports institutional capacity in developing regional and community partnership strategies for increasing access to higher education by priority groups and provides a mechanism for HEIs to raise awareness of the financial support available under PATH 2 and the complementary wraparound supports to facilitate successful participation by target group students.

Following a competitive call for proposals from regional clusters of higher education institutions (HEIs), the HEA initially approved a defined number of bursaries to each cluster for the three academic years commencing 2017/18. Funding was initially provided for the award of 200 bursaries per year worth €5,000 per year of study. The current composition of clusters is outlined in Table 1.

On foot of recommendations made by the HEA in its initial assessment of the first phase of PATH 2, a decision was taken to continue the 1916 Bursary Fund for a further three years commencing in the academic year 2020/21.

The continuation of the 1916 Bursary Fund in 2020 for a further three years envisaged supporting a further estimated 600 students across the six clusters of HEIs and bringing the total number of individual students supported since its introduction as a targeted measure to 1,200 by 2022. At least 20% of these bursaries were targeted at lone parents.

In addition, with RCSI University of Medicine and Health Sciences joining the Leinster Pillar 1 cluster with effect from 2020/21 academic year, the number of bursaries to be awarded each year increased to 203 in total.

With effect from the 2021/22 academic year, a three-tier system of bursary provision was introduced. In 2022/23, this consisted of the existing 203 bursaries arising from the original call worth €5,000 per annum (Tier 1) as well as an additional 50 bursaries (253 in total), 121 bursaries worth €2,000 per annum (Tier 2) and a number of once-off bursaries worth €1,500 payable for the 2022/23 academic year (Tier 3).

From 2023/24 onwards, further to an application made to the European Social Fund (ESF+) by the Department of Further and Higher Education, Research, Innovation and Science (DFHERIS), co-funding has been approved to allow for an increased number of PATH 2 bursaries at Tier 1 & Tier 2.

For the 2024/25 academic year, Exchequer funding will be used to support continuing students who received a bursary prior to the 2023/24 academic year, and ESF-co funding will be used to support new Tier 1 and 2 bursaries in 2024/25 as well as the second year of Tier 1 and Tier 2 bursaries for the 2023/24 cohort. Tier 1 and Tier 2 bursaries will also be payable to students as they progress through undergraduate studies and on to postgraduate study. The number of Tier 3 bursaries will depend on the existing Exchequer underspends in the system from the 2023/24 academic year and the remaining balance after Exchequer-funded continuing (including postgraduate) bursaries have been allocated for 2024/25. This three-tier system of bursary provision

is discussed in further detail in section 1.3.

From 2024/25 HEIs will use City of Dublin ETB (SUSI) as a sub processor to provide operational assistance in assessing/processing bursary applications and issuing funds to students.

### 1.3. Governance and Administration

The 1916 Bursary Fund is managed by the Higher Education Authority (HEA) on behalf of the Department of Further and Higher Education, Research, Innovation and Science (DFHERIS). HEIs are required to operate the 1916 Bursary Fund in accordance with these guidelines.

The HEA is responsible for allocating funding to the regional clusters of HEIs and the management of the reporting process on the progress of the 1916 Bursary Fund.

Regional clusters of HEIs are responsible for the application, selection, and award process for the 1916 Bursary Fund.<sup>1</sup> Further to extensive collaboration by clusters, a Central Applications and Assessment Facility (CAAF) was designed and developed to streamline the application, selection and award process for the 1916 Bursary Fund. HEIs will use City of Dublin ETB (SUSI) as a sub processor to provide operational assistance in assessing/processing bursary applications through the CAAF and issuing funds to students.

PATH 2 bursary allocations for each regional cluster are provided in Table 1 below with a lead institution, accountable to the HEA for progress as outlined in section 4. Release of funding will be contingent on the receipt of satisfactory reports demonstrating progress in line with agreed project plans.

**As part of the implementation of PATH 2 for the 2024/25 academic year, three tiers of bursaries will be available for awarding to students:**

- **Tier 1 - €5,000 per annum** for the duration of studies awarded to a total of 400 new entrants to higher education across the six clusters. Tier 1 bursaries will also be paid as a student progresses into postgraduate study. This means that students already in receipt of a 1916 Bursary will be entitled to continue to receive a bursary for postgraduate study. See section 3.4 for further details.
- **Tier 2 - €2,000 per annum** for the duration of studies to a total of 200 students across the six clusters who met the criteria for the 1916 Bursary but who did not ultimately qualify on the cluster's order of merit for a Tier 1 bursary. Tier 2 bursaries will also be paid as a student progresses through their undergraduate studies and into postgraduate study which means that a recipient starting their undergraduate course in 2024/25 will later be

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<sup>1</sup> Further to the development of a Central Applications and Assessment Facility, Data Sharing Agreements must be in place with SUSI, the processor HEIs use to provide operational assistance in assessing/processing bursary applications and issuing funds to students, in advance of any data transfer.

entitled to continue to receive a bursary for postgraduate study.

- Tier 3 – Once-off bursaries of €1,500 payable for the 2024/25 academic year only** to students who met the criteria for the 1916 Bursary but who did not ultimately qualify on the cluster’s order of merit for a Tier 1 or Tier 2 bursary. The number of Tier 3 bursaries will depend on the underspends in the system from 2023/24 and the balance after continuing (including postgraduate) bursaries have been allocated for 2024/25. The extent of underspends is limited, and it is unlikely that there will be sufficient funding available to provide Tier 3 bursaries to all eligible applicants who did not receive a Tier 1 or a Tier 2 bursary. Clusters are not permitted to use underspends that may arise from budgets for new bursaries in 2023/24, 2024/25, and subsequent years (i.e., no budgets that have the potential to be reclaimed from ESF can be used for Tier 3 bursaries). The HEA will contact clusters separately to determine the amount of underspend in the system and the budget for Tier 3 bursaries.

All three tiers of bursary form part of the PATH 2 – 1916 Bursary Fund and, as relevant, are subject to the overall terms and conditions of the Fund as set out in these guidelines.

In relation to Tier 1 and 2 bursaries, the number of bursaries allocated to each cluster for awarding to new entrants for the 2024/25 academic year is set out in the table below:

**Table 1: Bursary Allocation by Cluster**

	<b>Tier 1 Bursaries (€5,000 per annum)</b>	<b>Tier 2 Bursaries<sup>2</sup> (€2,000 per annum)</b>	<b>Tier 3 Once-Off Bursaries (€1,500 payable for 2024/25 academic year only)</b>
Leinster Pillar I (UCD, TCD, NCAD, IADT, MIE, RCSI University of Medicine and Health Sciences)	63	31	To be determined based on underspends in the system from 2023/24 and the balance after continuing (including postgraduate) bursaries have been allocated for 2024/25.  <b>Please note that underspends arising from the allocation for new Tier 1 and Tier 2 bursaries from 2023/24 cannot be used for Tier 3 bursaries.</b>
MEND (DCU, MU, DkIT, TUS Midlands)	71	36	
South (UCC, MTU, SETU)	94	47	
Mid-West (UL, MIC, TUS Midwest)	49	25	
West/North-West (ATU, University of Galway)	72	36	
TU Dublin	51	25	
<b>Total</b>	<b>400</b>	<b>200</b>	

<sup>2</sup> In 2023/24, due to an administrative error, the MEND cluster allocated a total of 45 Tier 2 bursaries and TU Dublin allocated a total of 26 Tier 2 bursaries.

Each cluster will receive two separate PATH 2 funding allocations for the 2024/25 academic year, as below:

- An overall allocation for Tier 1 and Tier 2 **continuing students who received bursaries prior to the 2023/24 academic year** (including students progressing to postgraduate study). This allocation has been informed by data reported by clusters to the HEA in early 2024. The allocation for Tier 3 bursaries will be confirmed at a later date.
- An overall allocation for Tier 1 and Tier 2 **new bursaries for 2024/25 and year two continuing bursaries for the 2023/24 cohort**. This allocation has been informed by an application by the DFHERIS to the European Social Fund for the co-funding of 1916 bursaries.

The HEA will notify each cluster separately in relation to the PATH 2 funding allocation for the 2024/25 academic year.

#### 1.4. European Social Fund Co-Funding

From 2023/24 onwards, further to an application made to the European Social Fund (ESF+) by the Department of Further and Higher Education, Research, Innovation and Science (DFHERIS), co-funding has been approved to allow for an increased number of PATH 2 bursaries at Tier 1 & Tier 2 to be provided to students. ESF does not apply to Tier 3 bursaries.

Support from the ESF+<sup>3</sup> means that DFHERIS must pay for the full cost of the bursary upfront and later claim a rebate from the ESF+ Managing Authority. Before this funding can be claimed back from the ESF, several agreements must be put in place between all relevant stakeholders. Increased bursaries as set out above are being provided for a second consecutive year and work is currently ongoing with a view to finalising necessary agreements to allow rebates for 2023/24 and 2024/25 to later be claimed. When agreements are finalised, the clusters will be advised of this, and additional reporting will be required for the 2023/24 and 2024/25 academic years to enable rebates to be claimed.

**We are drawing it to the attention of clusters that it is likely that ESF will need to be reclaimed in the 2024/25 academic year.** From 2023/24 onwards Tier 1 and Tier 2 Bursaries will be subject to compliance with ESF+ requirements. This includes increased data collection and document retention requirements. See section 2.3, section 6, section 7, and section 8 for more detail on these mandatory requirements. Clusters will be required to meet these requirements as Tier 1 and Tier 2 bursaries for the PATH 2 programme for the academic years 2023/24 and 2024/25 are co-funded by the ESF+. **Some of these requirements will need to be implemented immediately, such as the use of the ESF logos, etc. on all communication, collation of supporting documentation to verify eligibility, and the collation of data on ESF+ non-financial indicators.** More information is provided below.

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<sup>3</sup> Funding provided under the ESF+ EIST Programme is subject to compliance with the ESF+ Regulation (EU) 1057/2021 and Common Provision Regulation (EU) 1060/2021.

## 2. Application and award process for the 1916 Bursary Fund

### 2.1. Eligibility criteria for awarding new bursaries in 2024/25 academic year

- 2.1.1. All applicants must demonstrate that they would qualify for the special rate of maintenance grant under the Student Grant Scheme (SUSI) and/or are in receipt of a Department of Social Protection (DSP) long-term means-tested social welfare payment including those in receipt of an orphan's payment.

Applicants must also have been resident in the State (Republic of Ireland) for three of the past five years on the date on which their first year of study commences **AND** be from one or more of the following priority groups or from any priority group identified in the National Access Plan (2022-2028):

- Students from communities, groups or areas that are socioeconomically disadvantaged or that have low levels of participation in higher education.<sup>4</sup>
- Students who have experienced homelessness.
- Students with experience of the care system.
- Students who are survivors of domestic violence.
- Students who have experience of the criminal justice system.
- Socioeconomically disadvantaged mature students (23 or older on 1 January of their year of entry to higher education – and having never previously accessed higher education).
- “Second-chance” socioeconomically disadvantaged mature students. Such students may be considered for a bursary where they have:
  - previously attended but not completed a course,
  - had a three-year break in studies since leaving the course, and
  - are returning to attend an approved course.
- Students with a disability.
- Students who are carers (confirmed by the Department of Social Protection (DSP) as holding a long-term means-tested carer's allowance).
- Members of Irish Traveller community and Roma community.
- Lone parents or teen parents (confirmed by the Department of Social Protection (DSP) as holding a long-term means-tested social welfare payment) – at least 20% of Tier 1 bursaries will be reserved for lone parents. If this quota is not met by such applicants, bursaries can be offered to other applicants.
- Students who are migrants, refugees or who are from ethnic minorities<sup>5</sup> who are lawfully present in the State and are:
  - a national of an EU Member State, a state which is a contracting state to the EEA agreement, the UK or the Swiss Confederation,
  - or person whose current immigration status or leave to remain under the Department of Justice, is one of the following:
    - **Refugee, Programme Refugee, Family Reunification:**

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<sup>4</sup> Eligibility is not limited to students from disadvantaged areas as per DIS categorisation; students who qualify for the special rate of maintenance grant under the Student Grant Scheme (SUSI) and/or are in receipt of a Department of Social Protection (DSP) payment are considered to be socioeconomically disadvantaged.

<sup>5</sup> Ethnic minority refers to a culture or ethnicity that is identifiably distinct from the ethnic majority. According to Census 2016 data, the largest ethnic group in Ireland was “White Irish”. More information on the CSO's categorisation of ethnic and cultural background can be found [here](#).



- A refugee or other person entitled for the time being to the rights and privileges specified in section 3 of the Refugee Act 1996, including a person granted:
- Leave to enter and remain in the State as a programme refugee under section 24 of that Act, or
- permission to enter and reside in the State as a family member of a refugee pursuant to section 18 of that Act;
  - A person who is, pursuant to the International Protection Act 2015:
    - given a refugee declaration under section 47(1) of that Act, or
    - a programme refugee under section 59 of that Act.
- **Subsidiary Protection:**
  - A person, pursuant to the European Communities (Eligibility for Protection) Regulations 2006 (S.I. No. 518 of 2006):
    - 1. Who the Minister for Justice has determined is eligible for the time being for subsidiary protection pursuant to Regulation 4 of those Regulations, or
    - 2. To whom the Minister for Justice has granted permission for the time being in writing to enter and reside in the State pursuant to Regulation 16 of those Regulation.
  - A person, pursuant to the European Union (Subsidiary Protection) Regulations 2013 (S.I. No. 426 of 2013):
    - who is a person eligible for subsidiary protection and in relation to whom a subsidiary protection declaration is in force and to whom a permission to reside within the State has been granted pursuant to those Regulations; or
    - to whom the Minister for Justice has granted permission to enter and reside in the State pursuant to Regulation 25 of those Regulations; or
    - to whom the Minister for Justice has granted permission to reside in the State pursuant to Regulation 26 of those Regulations.
  - A person who is given a subsidiary protection declaration under section 47(4) of the International Protection Act 2015.
- **European Communities (Free Movement of Persons Regulations) 2006 and 2008**
  - A person who is a family member of a person who is a national of –
    - an EU Member State,
    - a state which is a contracting state to the EEA Agreement,
    - the Swiss Confederation, and
    - has permission to remain in the State as a family member of such person under the provisions of the European Communities (Free Movement of Persons Regulations) 2006 and 2008 and Directive 2004/38/EC of the European Parliament and of the Council of 29 April 2004.
- **Spouse, civil partner, or dependent child of Irish national residing in the State**
  - A person who has permission to remain in the State
    - (i) by virtue of marriage to, or a civil partnership with, an Irish

- national residing in the state, or
  - (ii) as a dependent child of a person coming with clause (i)
- **Dependent child of naturalised Irish citizen residing in the State**
  - o A person who has permission to remain in the State as a dependent child of a person who has acquired Irish Citizenship by naturalisation, residing in the State.
- **Humanitarian leave to remain**
  - o A person to whom the Minister of Justice has granted a residence permission in accordance with the International Protection Regularisation Scheme, and which permission is still valid.
- A person granted permission to reside in the State under section 49 of the International Protection Act 2015.
- **Decision not to deport under section 3 of the Immigration Act 1999**
  - o A person in respect of whom the Minister for Justice has granted permission to remain following a determination not to make a deportation order under section 3 of the Immigration Act 1999.
- child of a Turkish national in respect of whom the Minister of Justice has granted a permission to reside and who, in accordance with article 9 of Decision 1/80 of the Association Council made pursuant to the Ankara Agreement 1963, is residing with their parents, who are or have been legally employed within the State and can satisfy the conditions relation to employment laid down in Articles 6 & 7 of Decision 1/80.

For further clarification, see [section 14 of the Student Support Act 2011](#) and Regulation 5 the Student Support Regulations 2023 [S.I. No. 104/2024 - Student Support Regulations 2023 \(irishstatutebook.ie\)](#)).

- Further education and training award holders progressing to higher education, from the named priority groups outlined above.
- 2.1.2. Persons who are in the process of an application for refugee status, subsidiary protection system or leave to remain or at deportation order stage are not eligible to apply for a 1916 Bursary Scheme. Only students who have been granted a permission as listed in sub-section 2.1.1 of the guidelines can be considered. Persons who are in the protection system or at the leave to remain or at deportation order stage are not eligible to apply for a 1916 Bursary<sup>6</sup>.
- 2.1.3. All applicants must be first-time new entrants to undergraduate study (or meet the criteria of section 2.1.1 in respect of “second-chance” socioeconomically disadvantaged mature students).
- 2.1.4. All applicants must be pursuing an approved full-time or approved part-time undergraduate course as defined in Appendix 1.
- 2.1.5. All applicants must be pursuing their studies in one of the approved institutions in the regional clusters of HEIs (see Table 1).
- 2.1.6. Applicants registered on NTO [tertiary programmes](#)<sup>7</sup> and who have a valid HEI student

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<sup>6</sup> Persons who are in the protection system or at the leave to remain (not at deportation order) stage can apply to be considered for support under the International Protection Student Scheme: <https://www.gov.ie/en/service/e786a-student-grant-scheme-for-asylum-seekers/>.

<sup>7</sup> For a full list of Tertiary Programmes, please see <https://nto.heai.ie/courses/>.

number are eligible to apply for a bursary through the partner HEI, subject to meeting the criteria outlined above. The partner HEI is responsible for all PATH 2 management, payment, and reporting requirements from the time the student commences the tertiary programme to the completion of their studies.

## **2.2. Promotion**

- 2.2.1. It is required that HEIs work closely with community partners, including community groups and organisations, Local Community Development Committees, DEIS schools, further education providers, to ensure that eligible applicants are aware of the 1916 Bursary Fund and to promote awareness of the Fund. This includes complementary activity supported by PATH 3. HEIs will be expected to show evidence of this engagement as part of the reporting process.
- 2.2.2. Where possible, clusters are expected to work with each other towards the development of common approaches to promotion of the 1916 Bursary Fund to ensure clarity for students.
- 2.2.3. The 1916 Bursary Fund must be advertised in a consistent manner on the websites of participating HEIs. The material provided should be clear, consistent with these guidelines and include the relevant contact details should a potential applicant require further information about the application and award process and comply with 2.3 below.
- 2.2.4. From time to time, bursary recipients may be invited to participate in events to promote the 1916 Bursary Fund. This participation should be voluntary, and no obligations should be placed on a bursary recipient in this regard.
- 2.2.5. All communications and advertisements for the Bursaries must display the relevant Logos of the Government and the ESF as set out in 2.3 below.

## **2.3. ESF+ Communication and Visibility**

- 2.3.1. Tier 1 and Tier 2 bursaries for the 2023/24 and 2024/25 academic years are co-funded by the ESF+, clusters should adhere to the following requirements.
- 2.3.2. It is a condition of funding that the emblem of the European Union shall be prominently featured on all communication materials such as printed or digital products, websites and their mobile views relating to the implementation of an operation, used for the public or for participants. The statement 'Funded by the European Union' or 'Co-funded by the European Union' shall be written in full and placed next to the emblem.
- 2.3.3. The cover page of this document includes the agreed logo that must be attached to all communications and website material that reference the 1916 Bursary/PATH 2 Bursary. The logos are also available on the EU Funds website: [Regulations and Guidance 21-27 - EU Funds](#). In the event of any accessibility issues, a request can be made to the Communications Officer of the ESF+ Managing Authority at [ESF@dfheris.gov.ie](mailto:ESF@dfheris.gov.ie).
- 2.3.4. In addition to the EU Emblem, the Government of Ireland (GOI) Mark must be used to acknowledge the Exchequer co-funding. If used horizontally the GOI mark should be placed on the left, followed by the EU Emblem and other logos, as appropriate. If used vertically the GOI mark should be placed on the top, followed by the EU Emblem and

other logos, as appropriate.

- 2.3.5. In addition to the logos, beneficiaries should acknowledge support from the Government of Ireland and the EU, by providing a statement highlighting the co-funding in a visible manner on documents, websites, and communication material relating to the implementation of the operation, intended for the public or for participants. It is recommended that the following statement be used: 'This Operation is co-funded by the Government of Ireland and the European Union'.
- 2.3.6. The logos should be visible, when landing on the website that is operated by a project that is in receipt of ESF+ Funding. The logos should also be viewable inside the viewing area of a digital device, without requiring a user to scroll down the page.
- 2.3.7. For bodies that have an EU co-funded project as part of their many activities, it is sufficient that the specific page relating to the operation has the required references and logos.
- 2.3.8. A website entirely dedicated to one or more Operations is required to have the logo and references on its home page.
- 2.3.9. A link to the EU Funds website ([www.eufunds.ie](http://www.eufunds.ie)) should also be included on the website.
- 2.3.10. Where a social media account exists the EU support should be prominently displayed in the bio/profile description so it is always visible. The Irish and EU Flag emojis can be used to represent co-funding.
- 2.3.11. The hashtag [#EUinmyregion](#) should be used wherever possible.
- 2.3.12. The Communications Officer of the ESF+ Managing Authority can be contacted at [ESF@dfheris.gov.ie](mailto:ESF@dfheris.gov.ie) if clarification is needed regarding design and layout.
- 2.3.13. The use of the logo is mandatory for DFHERIS/HEA/HEIs (and any parties assisting HEIs, including City of Dublin ETB (SUSI)) on all communications regarding the bursary.

## **2.4. Application process**

- 2.4.1. While clusters are expected to carry out pre-entry application processes including close collaboration with community partners and organisations, it is recognised that clusters may not be in a position to offer or award bursaries to students until they have been offered a place on a course in a HEI within the cluster and can confirm that they will receive the special rate of SUSI grant and/or are in receipt of a long-term DSP means-tested social welfare payment. Therefore, clusters are recommended to develop and manage their processes to reflect this.
- 2.4.2. Clusters should ensure that applicants applying for a bursary are fully aware that there is no automatic entitlement to a 1916 Bursary. Applicants should be made aware that although they may meet the eligibility criteria of the scheme, the number of bursaries available is limited.
- 2.4.3. All bursary applicants should be made aware of the wraparound supports available to target group students within HEIs.
- 2.4.4. Prior to making an application, students must be made aware that a bursary will not be awarded to successful applicants until they have been formally offered a place at the HEI to which they are applying, and confirmation has been received that they satisfy the requirements set out under section 2.1.1.
- 2.4.5. Prior to making an application, students must be made aware that ESF+ Funding is co-funding their bursary and data from a successful Tier 1 or Tier 2 Bursary's application

form may be shared with relevant bodies (including City of Dublin ETB (SUSI) and any party assisting the HEIs in assessment/processing) for compliance with reporting purposes. They must also be informed that it is a condition of the bursary that they must furnish additional information for ESF+ reporting purposes if requested. Failure to do so may result in their bursary being stopped. Details of information required and bodies with which data will be shared are set out below.

## **2.5. Selection process**

- 2.5.1. In the case of Tier 1 bursaries, it is a requirement of funding that at least 20% of bursaries in a given year will be reserved for lone parents. If this quota is not met by such applicants, bursaries can be offered to other applicants.
- 2.5.2. The HEA expects that all selection processes are fully documented in line with General Data Protection Regulation requirements.
- 2.5.3. The outcome of the selection process should be notified to applicants as soon as possible after it has concluded.
- 2.5.4. Applicants should be permitted to appeal the outcome of their application in respect of process only. Any such appeal must be completed within 21 days of the applicant being made aware of the outcome of their application.
- 2.5.5. In the case of Tier 2 bursaries, these bursaries shall be awarded to students who met the criteria for the 1916 Bursary but who did not ultimately qualify on the order of merit for a Tier 1 bursary.
- 2.5.6. In the case of Tier 3 bursaries, these bursaries shall be awarded to students who met the criteria for the 1916 Bursary but who did not ultimately qualify on the order of merit for a Tier 1 or Tier 2 bursary.
- 2.5.7. In the case of Tier 2 bursaries, clusters should ensure they maintain a reserve list of 1916 Bursary (Tier 1) applicants.

## **2.6. Award process**

- 2.6.1. It is the HEI's responsibility to confirm that successful applicants satisfy the eligibility requirements set out in section 2.1 prior to formally offering them a bursary. From 2024/25, HEIs are using City of Dublin ETB (SUSI) as a sub processor to provide operational assistance in assessing/processing bursary applications and issuing funds to students.
- 2.6.2. HEIs should work towards the early notification of outcomes of the selection process including, where possible, a notification of a conditional offer of a bursary. The formal awarding of a bursary, however, may only occur once the student has accepted their place at the relevant HEI.
- 2.6.3. All bursary recipients should be advised of the institutional supports available to them to enhance their student experience in higher education. The financial assistance provided by the bursaries is intended to complement a comprehensive suite of wraparound supports (pastoral, academic and other supports) available within HEIs.
- 2.6.4. Should a bursary recipient accept a place in an approved HEI outside of the cluster to which they applied, the student will be entitled to receive the bursary while registered as a student in the approved HEI to which they have transferred. Where a cluster receives a transferred-in bursary, that cluster is expected to fund that bursary from

within its overall PATH 2 allocation to be provided by the HEA. For 2024/25 ESF funded bursaries, the City of Dublin ETB (SUSI) will manage this process. See section 3.7 for further detail.

- 2.6.5. Where a transfer happens within a cluster, it is assumed that HEIs will transfer bursaries between themselves resulting in the number of allocated bursaries varying accordingly. The HEA should be notified in either instance as part of progress reporting.

### **3. General conditions of the 1916 Bursary Fund**

#### **3.1. Payment**

- 3.1.1. Bursaries for 2024/25 are in the amount of €5,000 per annum (Tier 1) and €2,000 per annum (Tier 2) for both full-time and part-time students and no variations should be applied to this amount. This amount applies throughout a student's studies, including both undergraduate and postgraduate study.
- 3.1.2. In the case of Tier 3, the bursary amount (€1,500) is once-off and shall be payable for the 2024/25 academic year only. It should be made clear to students in receipt of a Tier 3 bursary that funding will not continue for subsequent academic years.
- 3.1.3. In the case of Tier 1, bursaries should be paid in instalments, directly to the bursary recipient's SEPA bank account, over the course of an academic year. In the case of Tier 2 and 3, clusters and HEIs have discretion to make a payment to the student in one instalment. From 2024/25, HEIs are using City of Dublin ETB (SUSI) as a sub processor to provide operational assistance in assessing/processing bursary applications and issuing funds to students for ESF bursaries.
- 3.1.4. It is the HEI's responsibility to coordinate payment of the bursary in a timely manner.
- 3.1.5. The HEA will provide two separate funding allocations to the lead cluster HEI in relation to non-ESF funded bursaries and ESF funded bursaries respectively. For new bursaries awarded in 2024/25, the lead cluster HEI will transfer the required funding to SUSI for onward payment to bursary recipients following confirmation of eligibility. The lead cluster HEI will transfer the required funding to cluster HEIs for all other continuing bursaries (including ESF funded year two bursaries for the 2023/24 cohort) for onward payment to bursary recipients.
- 3.1.6. Clusters will be allocated funding for 1) Tier 1 and Tier 2 new bursaries for AY 2024/25 and year two continuing bursaries for the 2023/24 cohort, and 2) Continuing Tier 1 and 2 bursaries awarded prior to AY 2023/24. In the event of any underspends, clusters should advise the HEA. Clusters are not permitted to utilise Exchequer underspends without prior approval of the HEA.
- 3.1.7. Underspends in relation to ESF funded bursaries must be returned. Further guidance in relation to the mechanism for the return of ESF funded bursary underspends will be provided separately.

#### **3.2. Duration of bursaries**

- 3.2.1. In the case of Tiers 1 and 2, a bursary will be awarded for the normal duration of a full-time undergraduate course as defined in Appendix 1. The bursary may also be held for progression at undergraduate level, i.e., from Level 6 to Level 7 and from Level 7 to

Level 8. Where the normal duration of a Level 8 course exceeds four years, the bursary will be awarded for the full normal course duration.

- 3.2.2. A Tier 1 and 2 bursary will be awarded for the normal duration of a part-time undergraduate course (i.e., Level 6, 7 or 8), up to a maximum period of six years.
- 3.2.3. A Tier 1 and 2 bursary may be continued where the awardee is progressing for the normal duration of a full-time or part-time postgraduate course level as defined in Appendix 1. The bursary may also be held for progression from Level 8 Higher Diploma to Level 9 and Level 10. A bursary will not be provided for two postgraduate courses that are at the same NFQ level, e.g., two Level 9 courses within the overall cap of four years. However, bursary holders who already hold a Postgraduate Diploma at Level 9 can be supported in their progression to a Masters Degree at Level 9. A maximum of four years of funding is available to first-time postgraduate students. Candidates must be progressing from a level already held to a higher level to remain eligible for funding. See further detail in section 3.4.
- 3.2.4. In the case of Tier 3, the bursary is once-off and will be awarded for the 2024/25 academic year only, i.e., for the first year of undergraduate study.

### **3.3. Student progression**

- 3.3.1. Bursary recipients are expected to abide by the regulations of their HEI and undergo any examinations or assessments as required of their course. The HEI is required to verify, at regular intervals, that the bursary recipient is continuing to satisfy their course requirements prior to paying further instalments. Where this is not the case, no further instalments should be paid. As per ESF reporting requirements, HEIs should issue the relevant exit surveys to the student as set out below.
- 3.3.2. In the case of Tiers 1 and 2, bursaries may be renewed where it has been confirmed that the recipient has progressed to the next year of their course. The first instalment due in a new academic year should not be made until the bursary recipient has been fully registered at their HEI.
- 3.3.3. In the case of Tiers 1 and 2, bursaries should not be paid in respect of a repeat period of study, therefore any student repeating a year must have their bursary paused until they progress. The HEI is permitted to waive this rule where there are exceptional circumstances, e.g., certified serious illness or extenuating circumstances. Any such recipients funded for a repeat year of study should continue to receive the bursary for the duration of their course.

### **3.4. Progression to postgraduate study/Graduate Entry Medicine**

- 3.4.1. In relation to postgraduate study (Level 8 Higher Diploma, Level 9 or 10), a 1916 Bursary recipient who has successfully completed their undergraduate course and wishes to progress to a postgraduate course in an institution approved for PATH 2 funding will be entitled to apply to have their bursary renewed for postgraduate study. Bursary recipients who already hold a Postgraduate Diploma at Level 9 can be supported in their progression to a Master's Degree at Level 9 within the overall cap of four years. The postgraduate progression route is as follows: Higher Diploma (Level 9) → Postgraduate Diploma (Level 9) → Master's degree (Level 9) → PhD/Doctorate Degree (Level 10).

- 3.4.2. For the purposes of 1916 Bursary Fund only, existing PATH 2 bursary recipients are deemed to have met the progression requirement and can be supported if they choose to progress to Graduate Entry Medicine courses, for the duration of that course subject to an overall cap of 4 years for the Graduate Entry Medicine Course.
- 3.4.3. A postgraduate bursary will be in the amount of €5,000 per annum (Tier 1) and €2,000 per annum (Tier 2) for both full-time and part-time students and no variations should be applied to this amount.
- 3.4.4. A 1916 Bursary recipient wishing to progress to postgraduate study will be expected to formally notify their HEI of their intention to progress to postgraduate study in order to renew their bursary. Clusters will not be required to re-assess the student's eligibility – subject to continued compliance with the overall terms of the fund as set out in these guidelines.
- 3.4.5. In relation to a bursary recipient who chooses to pursue a postgraduate course in a different approved HEI or cluster, the student should be advised to apply to the HEI or cluster where they intend to do their course. In such cases, the student should be provided with a letter of confirmation from the HEI where they completed their undergraduate study confirming that they are a 1916 Bursary recipient. Clusters should support students by facilitating contact with relevant staff in the HEI or cluster where the student intends to do their postgraduate course.<sup>8</sup>
- 3.4.6. Where a cluster receives a transferred-in bursary as provided for under section 3.4.4, that cluster is expected to fund that bursary from within its overall PATH 2 allocation to be provided by the HEA.
- 3.4.7. For the 2024/25 academic year, postgraduate bursaries are open to both current PATH 2 1916 bursary recipients (i.e., students completing their undergraduate studies in 2023/24) and previous PATH 2 1916 bursary recipients (i.e., students who completed their undergraduate studies prior to 2020/21), subject to the availability of sufficient funding. Previous 1916 Bursary recipients who have already commenced a course of postgraduate study will also be entitled to receive a bursary for the remainder of their postgraduate studies (subject to the progression requirement and the overall cap of four years).
- 3.4.8. Bursary recipients who wish to defer their postgraduate study may do so for a maximum one academic year with the prior written approval of their HEI. Deferral may occur before the student commences their studies or during their studies. A student who has not yet applied for a postgraduate course may also defer their bursary for a maximum of one year. In exceptional circumstances only, a cluster has discretion to consider allowing the student to defer their studies for longer than one year, subject to the availability of sufficient funds within the cluster. Please note that bursaries deferred for longer than one year must be funded by underspends from the cluster's PATH 2 Exchequer budget or underspends from the cluster's ESF budget in the case of ESF funded bursaries. ESF funding and ESF funding underspends **cannot** be used to support deferrals of non-ESF co-funded bursaries. It is a matter for each cluster to determine on a case-by-case basis if an extension to the deferral period can be granted, subject to exceptional circumstances and the availability of funding within the cluster. Before granting an extension to the deferral period, clusters should notify the HEA and

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<sup>8</sup> Transfer of bursaries may only take place where the student is transferring to a HEI that is part of one of the six regional clusters (see Figure 1). Similarly, students may not transfer bursaries to study in another jurisdiction outside the State.



confirm how the deferral will be funded.

- 3.4.9. As per section 3.6.1, students are not permitted to hold a Tier 1 or Tier 2 1916 Bursary at postgraduate level in conjunction with any other bursary, scholarship, or award, irrespective of value. Tier 3 bursary recipients can be in receipt of another bursary, scholarship, or award of not more than €1,500 in the same academic year.
- 3.4.10. Where relevant, students are permitted to hold a 1916 Bursary in combination with a SUSI grant or long-term DSP means-tested payment or other supports specified in section 3.6.

### **3.5. Tier 3 bursaries**

- 3.5.1. In addition to the Tier 1 and 2 bursaries, as part of each cluster's overall PATH 2 Exchequer allocation, funding may also be available for a number of once-off bursaries (Tier 3 bursaries) that may be awarded to students who met the criteria for the 1916 Bursary but who did not ultimately qualify for a Tier 1 or Tier 2 bursary.
- 3.5.2. Tier 3 bursaries will be in the amount of €1,500 and will be payable for **the 2024/25 academic year only**. These bursaries are open to undergraduate students in the first year of an approved course.
- 3.5.3. Students in receipt of Tier 3 bursaries are permitted to hold another bursary, scholarship, or award of not more than €1,500 in the same academic year.
- 3.5.4. The number of Tier 3 bursaries is subject to available funding. Therefore, clusters should ensure they maintain a reserve list of 1916 Bursary applicants who may be entitled to receive this once-off bursary.
- 3.5.5. Other conditions, as relevant and as set out in this document, that apply to the awarding of full 1916 bursaries also apply to the awarding of once-off bursaries.
- 3.5.6. Clusters are reminded that Tier 3 bursaries for 2024/25 are being supported through available underspends and therefore there should be no expectations of such future allocations being available.

### **3.6. Conditions in respect of other supports**

- 3.6.1. Tier 1 and Tier 2 students are not permitted to hold a 1916 Bursary in conjunction with any other bursary, scholarship, or award, irrespective of value. However, Tier 3 bursary holders may hold another bursary, scholarship, or award of not more than €1,500 in the same academic year.
- 3.6.2. Where relevant, a bursary recipient is permitted to avail of any additional financial supports available to them where they are benefitting from the opportunity to study abroad as part of their course, e.g., Erasmus+.
- 3.6.3. Bursary recipients who are participating in the Tusla NTRIS Employment Support Scheme for Travel and Roma Communities may also continue to receive the 1916 Bursary while in receipt of the Tusla Scheme Grant.
- 3.6.4. Similarly, bursary recipients may also receive financial support through Dormant Accounts Funding, and PATH 1, PATH 3, PATH 4 and PATH 5 funding that supports members of the priority groups identified in the National Access Plan.
- 3.6.5. Where relevant, students are permitted to hold a 1916 Bursary in combination with a

SUSI grant.

- 3.6.6. Students on Back to Education Allowance or other DSP social welfare payments can hold a 1916 Bursary without it having any impact on their Back to Education Allowance entitlement or other social welfare payment.
- 3.6.7. A 1916 Bursary will be considered an income disregard for the purposes of reckonable income in relation to SUSI grants or means-tested social welfare payments.
- 3.6.8. Bursary holders who continue to experience financial distress are permitted to apply for the Student Assistance Fund and/or be covered for supports under the Fund for Students with Disabilities.

### **3.7. Deferral or transfer of bursaries**

- 3.7.1. In the case of Tier 1 and 2 bursaries, bursary holders are permitted to defer their bursaries at undergraduate level for a maximum of one academic year with the prior written approval of their HEI. Deferral may occur before the student commences their studies or during their studies. In exceptional circumstances only, a cluster has discretion to consider allowing the student to defer their studies for longer than one year, subject to the availability of sufficient funds within the cluster. Please note that bursaries deferred for longer than one year must be funded by underspends from the cluster's PATH 2 Exchequer budget or underspends from the cluster's ESF budget in the case of ESF funded bursaries. ESF funding and ESF funding underspends **cannot** be used to support deferrals of non-ESF funded bursaries. It is a matter for each cluster to determine on a case-by-case basis if an extension to the deferral period can be granted, subject to exceptional circumstances and the availability of relevant funding within the cluster. Before granting an extension to the deferral period, clusters should notify the HEA and confirm how the deferral will be funded. Conditions in respect of deferral of bursaries at postgraduate level are set out in section 3.4.7.
- 3.7.2. A bursary holder who wishes to change a course must obtain the prior written approval of their HEI. If a bursary holder wishes to transfer to a course in a different HEI, prior written approval must be obtained from the HEI to which the bursary holder intends to transfer. The HEA must be kept apprised of any such changes as part of the progress reporting process.
- 3.7.3. In the case of Tier 1 and 2 bursaries, a bursary may be retained by a student who, prior to commencement of their course in the HEI that has awarded them a bursary, wishes to transfer to another HEI (on the basis of a different course offer). This will be at the discretion of the HEI/cluster who originally awarded the bursary and appropriate arrangements must be made between the two clusters/HEIs to facilitate transfer. The HEA must be kept apprised of any such changes as part of the progress reporting process.<sup>9</sup>
- 3.7.4. Subject to the conditions of student progression as outlined in section 3.3, a Tier 1 or 2 bursary may be retained by a student who during their studies wishes to transfer to another HEI, provided that the student has completed at least one full year of study. The HEA must be kept apprised of any such changes as part of the progress reporting

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<sup>9</sup> Transfer of bursaries may only take place where the student is transferring to a HEI that is part of one of the six regional clusters (see Figure 1). Similarly, students may not transfer bursaries to study in another jurisdiction outside the State.

process.

- 3.7.5. Where a cluster receives a transferred-in bursary as provided for under sections 3.7.3 and 3.7.4, that cluster is expected to fund that bursary from within its overall PATH 2 allocation to be provided by the HEA.
- 3.7.6. Conditions in respect of the transfer of bursaries at postgraduate level are set out in section 3.4.4.
- 3.7.7. In the case of Tier 3 bursaries, in the event of a student transferring to a different cluster, the cluster receiving the student is expected to fund the cost of that bursary (if not already paid to the student) from within its overall PATH 2 allocation to be provided by the HEA.

### **3.8. Termination of bursaries**

- 3.8.1. A HEI may terminate a bursary at any time where the bursary holder is no longer adhering to the requirements of the 1916 Bursary Fund.
- 3.8.2. A bursary holder may terminate their bursary at any time; however, this action should not be taken without prior consultation with their HEI.
- 3.8.3. In circumstances where a bursary has been terminated, it may be re-allocated by the HEI subject to the following conditions:
  - every effort has been made to support the original bursary holder who has indicated they wish to withdraw from higher education;
  - the HEI is fully satisfied that the original bursary holder will not be returning to higher education;
  - where possible, an exit interview has been conducted with the original bursary holder to understand their reasons for non-progression;
  - in the case of a terminated ESF funded bursary, HEIs must conduct an exit survey with the original bursary holder to comply with ESF+ requirements;
  - a formal notice of termination has been issued to the original bursary holder;
  - the new bursary holder meets the eligibility criteria as outlined in section 2.1;
  - the duration of the re-allocated bursary does not exceed the duration of the original bursary; and
  - the HEA is kept apprised of any re-allocated bursaries as part of the progress reporting process.

## **4. Reporting and evaluation requirements under the 1916 Bursary Fund**

- 4.1. The HEA is responsible for monitoring performance and ensuring effective progress under the 1916 Bursary Fund.
- 4.2. HEIs are required to report any issues which may impact on the timely and effective provision of bursaries to the HEA immediately.
- 4.3. The lead HEI for each regional cluster is responsible for preparing and submitting annual progress and financial reports addressing a range of qualitative and quantitative indicators.
- 4.4. The lead HEI for each regional cluster is accountable for proper use of the 1916 Bursary Fund.
- 4.5. Release of funding will be contingent on the receipt of satisfactory reports demonstrating progress in line with agreed project plans.
- 4.6. The lead HEI for each regional cluster will be required to report on progress to enable

- regular updates to be provided to the National Access Plan Steering Group.
- 4.7. The HEA reserves the right to commission audits of participating HEIs for financial or other compliance matters. The HEA will take appropriate action where deemed necessary.

## 5. Data collection under the 1916 Bursary Fund

- 5.1. Further to the enactment of the HEA Act 2022, the HEA includes a tag on PATH 2 bursary recipients in the Student Record System (SRS) to identify students in receipt of PATH 2 bursaries. The Student Data Collection notice and the HEA's Data Protection Impact Assessment have been updated to reflect this change.
- 5.2. Clusters are still required to comply with annual data requests received from the HEA. The HEA will collate aggregated and anonymised data received as part of the progress reporting process for evaluation, public interest and statistical purposes and may share it with trusted third parties in accordance with general data protection requirements.
- 5.3. Reporting for the 2024/25 academic year will be based on the three-tier system of bursary provision for new entrants, as outlined in section 1.3., and clusters should be cognisant of this in the collection of data for same.
- 5.4. Clusters are advised that data on the number of bursary recipients who attended a DEIS school should be recorded.
- 5.5. It is the responsibility of the HEI to inform students of the data collection arrangements outlined above and to ensure that all processes associated with data processing for applications and awards are GDPR-compliant.
- 5.6. Clusters are responsible for ensuring compliance with GDPR regulations and HEIs should consult with their DPOs on all PATH 2 processes in this regard.

## 6. ESF+ Data Collection and Reporting

- 6.1. In addition to the reporting requirements to the HEA via the lead cluster HEI for **all** awarded bursaries, each HEI is obliged to collect and report to IEFAS (ESF+ IT system) on a number of financial and non-financial indicators for ESF funded bursaries to satisfy ESF+ requirements.
- 6.2. Applicants should be clearly informed when applying for their bursary of the data that will be required from successful recipients of Tier 1 and Tier 2 bursaries and the various bodies which will have sight of this data. They should also be informed that the provision of this data is a mandatory element of receiving/retaining the bursary. A centralised application system has been developed by the clusters and the services of a third party (City of Dublin ETB (SUSI)) have been procured to assist clusters with the application and assessment process and the issuing of funds to students. The ultimate responsibility for data collection will rest with the HEI and HEIs must ensure that the third party is aware of the data collection process and ensure all GDPR requirements are met.
- 6.3. The principle of data minimisation must be respected, and data should only be collected where necessary and proportionate. HEIs are asked to note the below table and the relevant officer should ensure that only the necessary personal data is collected at each stage of this process: application, award, and post-award.
- 6.4. The non-financial indicators for PATH 2 ESF+ Funding Period 2023-2027 are outlined in the following table and **defined in Appendix 2:**

Code	Indicator name	Stage data must be relevant from*
<b>GENERAL INDICATORS</b>		
	Participant ID	Application stage
	Project ID	Award stage (ID TO identify specific HEI)
	Gender	Application stage
	Date of Birth	Application stage
	Commencement Date	Date Course Starts
	Completion Date	Exit Survey
<b>COMMON OUTPUT INDICATORS</b>		
EECO01	Total number of participants	Award stage
EECO02	Unemployed, including long-term unemployed	Immediately prior to Commencement date
EECO03	Long-term unemployed	Immediately prior to Commencement date
EECO04	Inactive	Immediately prior to Commencement date
EECO05	Employed	Immediately prior to Commencement date
EECO06	Number of children below 18 years of age	Application stage
EECO07	Young people between 18 and 29 years of age	Application stage
EECO08	Number of participants of 55 years and above	Application stage
EECO09	With lower secondary education or less (ISCED 0-2)	Application stage
EECO10	With upper secondary (ISCED 3) or post-secondary education (ISCED 4)	Application stage
EECO11	With tertiary education (ISCED 5 to 8)	Application stage
EECO12	Participants with Disabilities	Application stage
EECO13	Third country nationals	Application stage
EECO14	Participants with a Foreign background	Application stage
EECO15	Minorities (including marginalised communities such as Roma)	Application stage
EECO16	Homeless or affected by housing exclusion	Application stage
EECO17	Participants from Rural areas	Application stage
EECR01	Participants engaged in Job searching upon leaving	Exit survey within one month of the student finishing or leaving the course
EECR02	Participants in Education or training upon leaving	Exit survey within one month of the student finishing or leaving the course
EECR03	Participants gaining a qualification upon leaving	Exit survey within one month of the student finishing or leaving the course

Code	Indicator name	Stage data must be relevant from*
EECR04	Participants in employment, including self-employment upon leaving	Exit survey within one month of the student finishing or leaving the course
EECR05	Participants in employment, including self-employment 6 months after leaving	Exit survey at 6 months after finishing or leaving the course
EECR06	Participants with an Improved labour market situation 6 months after leaving	Exit survey at 6 months after finishing or leaving the course
PSR1	Participants successfully completing the programme	Exit survey within one month of the student finishing or leaving the course (same as EECR03 above)
	<b>No. of indicators applicable</b>	<b>30</b>

***\* In respect of the Common Output Indicators EEC0001-EEC0017, where a specific stage is mentioned, this does not mean the information must be gathered at that stage. It means that when reporting on information, the reported answers to the questions must reflect the student's status relevant to the stage identified above.***

- 6.5. HEIs will be required to make financial declarations. Work is ongoing on the development of a new ESF+ IT system called IEFAS. Once fully developed, appropriate training will be provided to all beneficiaries (HEIs) by the DFHERIS ESF+ Managing Authority Unit.
- 6.6. The purpose of this system is to declare details of grants made to students which will form the basis of the ESF+ claim to the European Commission. While the system is still being developed, the following fields or similar will be required:
  - Transaction ID
  - Individual ID (Participant ID)
  - Date of transaction(s)
  - Commencement Date (Start of Academic Year)
  - Amount of Payment
- 6.7. There may be other requirements as the system is developed. Evidence of eligibility must be retained.
- 6.8. Beneficiaries (HEIs) will make financial declarations to claim the ESF+ co-financing in respect of approved operations under the EIST.
- 6.9. All financial declarations will be entered into the new IEFAS system and generally one declaration should be made per operation per academic year.
- 6.10. A specific financial indicator template will be designed for each action on the new IEFAS system, which can be downloaded (as a .csv file) from the system to facilitate the indicator upload.
- 6.11. Detailed explanations of the agreed financial indicator templates will be made available, and they will reflect the basis on which the ESF+ co-financing is being claimed, i.e., for PATH 2 bursary payments made to the students.

## **7. ESF+ Data Requirements**

- 7.1. HEIs are required to ensure that all supporting documents related to an operation supported by the funds, in particular evidence of eligibility for the fund, are kept at the appropriate level for a 5-year period from 31 December of the **year in which the last payment by the ESF+ Managing Authority to the beneficiary is made**.
- 7.2. In addition, the HEIs must furnish any such supporting documentation to the HEA, DFHERIS and any relevant bodies as per the Joint Controller Agreement as and when requested. This is in line with Article 82 of the Common Provision Regulation.

## **8. ESF+ Other Requirements**

- 8.1. There may be potential changes to ESF+ requirements over the course of the funding period. The HEA will inform HEIs at the earliest possible opportunity if any changes are envisaged.
- 8.2. Any additional data collection amendments will be subject to the usual data protection procedures to ensure the processing is compatible with GDPR.
- 8.3. Further information on the definitions of non-financial indicators is provided in Appendix 2.

## **9. Contact details**

Any queries relating to these guidelines should be emailed to [access@hea.ie](mailto:access@hea.ie).

## Appendix 1 – 1916 Bursary Fund – Approved Courses

### Undergraduate

A **full-time** or **part-time** undergraduate course leading to a major higher education and training award at Level 6 (Higher Certificate), Level 7 (Ordinary Bachelor's Degree), Level 8 (Honours Bachelor's Degree) on the [National Framework of Qualifications \(NFQ\)](#), or equivalent award that:

- (a) takes not less than **two years** to complete, and
- (b) on the successful completion of which a student is awarded a **major** higher education and training award, leading to an award of Level 6 or above on the NFQ, which is a recognised qualification pursuant to the NFQ, and
- (c) is provided by one of the approved institutions in the regional clusters of HEIs.

### Postgraduate

A **full-time** or **part-time** postgraduate course leading to a major higher education and training award at Level 8 (Higher Diploma), Level 9 (Postgraduate Diploma), Level 9 (Masters) or Level 10 (Doctorate) on the [National Framework of Qualifications \(NFQ\)](#), or equivalent award that:

- (d) takes not less than **one year** to complete, and
- (e) on the successful completion of which a student is awarded a **major** higher education and training award, leading to an award of Level 8 (Higher Diploma) or above on the NFQ, which is a recognised qualification pursuant to the NFQ, and
- (f) is provided by one of the approved institutions in the regional clusters of HEIs.

### Graduate Entry to Medicine

A **full-time** undergraduate course leading to a major higher education and training award at Level 8 (Honours Bachelor's Degree in Medicine, i.e., MB, BCh, BAO) on the [National Framework of Qualifications \(NFQ\)](#), that:

- (g) takes not less than **four years** to complete, and
- (h) on the successful completion of which a student is awarded a **major** higher education and training award, leading to an award of Level 8 (Honours Bachelor's Degree in Medicine i.e., MB, BCh, BAO) or above on the NFQ, which is a recognised qualification pursuant to the NFQ, and
- (i) is provided by one of the following approved Graduate Entry to Medicine course providers:
  - University College Cork (UCC).
  - University College Dublin (UCD).
  - University of Limerick (UL).
  - RCSI University of Medicine and Health Sciences.



## Appendix 2 – Definitions of Non-Financial Indicators

Table A.1. sets out the data required and the stage the data collected should be relevant from. Please note the following:

- For ESF funded bursaries, data collected from participants will consist of ESF+ data and non-ESF+ data. ESF+ general and Common Output indicator data should generally be collected as close as possible to Commencement Date i.e., on the bursary application form. HEIs should liaise with their own DPO regarding the appropriate stage to collect data.
- When a student finishes their course or exits their course (i.e., completion date), an exit survey is required to ascertain the status of the participant within 4 weeks upon leaving and again at 6 months after leaving. The completion date will be the date of last delivery of support/last day of class/end of academic term.
- The exit survey can take the form of an email to the student. The data required is Common Immediate result indicators EECR01-EECR04, Common Long-term result indicators EECR05-EECR06 and Programme Specific indicator PSR1 as detailed below. It is essential that evidence of the questions asked of the student and response received from the student at exit stage and the 6-month survey are retained. If no response is provided, the HEIs are asked to follow up with the student at least once to seek this information. If after all attempts have been exhausted, a value of 'RBNP' (Requested but not Provided) should be reported.
- Each individual HEI is responsible for recording data on their successful applicants. It is expected that reporting on ESF indicators by each HEI to IEFAS will take place in 2024/25 to support rebate claims. The cluster lead HEI will continue to comply with the separate reporting requirements to the HEA for **all** awarded bursaries.

**Table A.1.: Non-Financial Indicator Definition and Timelines**

	ESF Code	Variable	Variable definition	Response Values	Stage data must be relevant from
	N/A	Participant ID	The Participant ID should be a personal ID unique to the participant concerned, which can be associated with the relevant records retained locally. It is envisaged that the Participant ID will be the ID used by the operation concerned on a day-to-day basis, whether that is a PPSN, Student Number, Learner ID or other unique ID number.	Student ID No.	Application stage
	N/A	Project ID	Project ID relates to the operation or project in which the participant is enrolled, and the same Project ID should be used for all participants within that particular operation or project, where appropriate. The purpose of the Project ID is to allow data to be disaggregated once uploaded to the EIST IT solution, particularly where an operation is comprised of a large number of projects. A code referring to the HEI is recommended.  The Project ID should not be left blank, and a meaningful value-added entry is recommended. It might reflect the code or initials for a given sub-cascade body, the sub-categorisation of an Action, or important in the context of the mandatory Category of Region requirement referred to above, the geographical location of a sub-cascade body such as a training centre/provider code etc.	Academic Year the bursary was awarded.	Bursary award stage
		ESF Project ID	The ESF Project ID maps on the new IEFAS IT system the Project ID to the NUTS 3 region which		

			corresponds to the Category of Region i.e. More Developed – Munster & Leinster; Transition – Connacht & Ulster, which determine the rate of EU co-funding payable to the MA. The MA will provide the ESF Project ID in due course.		
	N/A	Gender		MALE; FEMALE; NON-BINARY	Application stage
	N/A	Date of Birth	Each participant’s Date of Birth should be recorded as this, combined with the Commencement Date, will allow the automatic calculation of the participant’s age on entry into the scheme and control of values entered in Age band indicators set out below.	dd/mm/yyyy	Application stage
	N/A	Commencement Date	refers to the date upon which a participant enters the ESF+ co-funded operation concerned and is the date upon which each of the Common Output Indicators should be recorded. Academic Year start date may be used.	Academic Year start date dd/mm/yyyy	Academic Year start date
	N/A	Completion Date	Completion Date refers to the date upon which the participant exits the ESF+ co-funded operation concerned and is the date to which common immediate and longer-term result indicators relate. It should be noted that the Completion Date is not necessarily the planned date of a participant’s exit from the operation. Where a participant leaves an operation before their planned completion date, the date upon which they leave should be recorded as the Completion Date.	Last date of Academic Term or date student leaves course dd/ mm/yyyy	Exit Survey
<b>Common output indicators</b>	EECO01	Total number of participants	is defined as the total number of participants benefiting directly from an EIST operation. For each participant, a ‘Yes’ should be entered in this field.	YES	Award stage
	EECO02	Unemployed, including long-term unemployed	is defined as persons usually without work, available for work and actively seeking work. Persons considered as registered unemployed according to national definitions are always included here even if they do not fulfil all three of these criteria. Full-time students who are also registered unemployed should be counted as EECO04 Inactive.  A full-time student in part-time work who is registered as unemployed, should be recorded as ‘Unemployed’.	YES; NO	Immediately prior to Commencement date
	EECO03	Long term unemployed	is a sub-group of EECO02 and refers to persons who upon entry into the operation have a continuous spell of unemployment lasting at least 12 months or more. Thus, a person who is long-term unemployed upon their entry into the operation shall be recorded separately under both indicators, EECO02 and EECO03.	YES; NO	Immediately prior to Commencement date
	EECO04	Inactive	is defined as persons currently not part of the labour force in that they are not employed or unemployed according to the definitions provided for EECO02 and EECO05. Many participants will be in education or training, i.e., students.  A full-time student who is registered as unemployed should be recorded as Inactive.	YES; NO	Immediately prior to Commencement date

			A part-time student who is not registered as unemployed should also be recorded as 'Inactive'; however, if the part-time student is registered as unemployed, then they should be recorded as 'Unemployed'.		
EECO05	Employed	<p>is defined as persons aged 15 to 89 who</p> <ul style="list-style-type: none"> <li>performed work for pay, profit or family gain</li> <li>were not at work but had a job or business from which they were temporarily absent</li> <li>produced agricultural goods whose main part is intended for sale or barter.</li> </ul> <p>Note that self-employed persons with a business, farm or professional practice are considered to be working for pay or profit if one of the following applies:</p> <ol style="list-style-type: none"> <li>1) A person works in their own business, professional practice or farm for the purpose of earning a profit.</li> <li>2) A person spends time on the operation of a business, professional practice or farm.</li> <li>3) A person is in the process of setting up a business, farm or professional practice.</li> </ol> <p><u>A full-time student who has a part-time job but is not registered as Unemployed, should be recorded as Employed</u></p> <p><u>A full-time student who is registered as unemployed should be recorded as Inactive.</u></p>	YES; NO	Immediately prior to Commencement date	
EECO06	Number of children below 18 years of age	is defined as participants aged under 18 years old upon starting an EIST operation i.e., upon Commencement Date	YES; NO	Application stage	
EECO07	Young people between 18 and 29 years of age	is defined as participants aged 18 or older, and under 29 years old upon starting an EIST operation. i.e., upon Commencement Date	YES; NO	Application stage	
EECO08	Number of participants of 55 years and above	is defined as the number of participants aged 55 years old or older upon starting an EIST operation. i.e., upon Commencement Date	YES; NO	Application stage	
EECO09	With lower secondary education or less (ISCED 0-2)	is defined as those persons for whom the highest educational level completed at the time of starting an EIST operation according to the International Standard Classification of Education (ISCED) 2011 classification of educational attainment, is ISCED 2 or less i.e., up to and including Level 3 (Junior Certificate) of the Irish National Framework of Qualifications (NFQ). If the participant did not complete primary education, they should be recorded under indicator EECO09.	YES; NO	Application stage	
EECO10	With upper secondary (ISCED 3) or post-secondary education (ISCED 4)	is defined as those persons for whom the highest educational level completed is ISCED 3 or ISCED 4, that is up to Leaving Certificate level or equivalent, or who have engaged in some further education and training up to NFQ Level 6. Leaving Certificate level is taken to mean that a participant has attempted one or more examinations of the formal Leaving Certificate examination overseen by the State Examination Commission. This indicator would encompass persons whose highest level of educational attainment is at Levels 4, 5 and 6 of the NFQ, unless their Level 6 attainment was in higher education. Level 6 attainment in higher	YES; NO	Application stage	

		education shall be recorded at EECO11.		
EECO11	With tertiary education (ISCED 5 to 8)	is defined as those persons for whom the highest educational level completed is ISCED 5, ISCED 6, ISCED 7 or ISCED 8 i.e. higher education at Level 6 of the NFAQ, or any qualifications from Levels 7-10 of the NFAQ. Persons who have already completed one or more academic year of higher education should be counted under EECO11.	YES; NO	Application stage
EECO12	Participants with Disabilities (special category)	<p>is defined as persons with long-term physical, mental, intellectual or sensory impairments which, in interaction with various barriers, may hinder their full and effective participation in society on an equal basis with others. There are a number of different, but complementary, definitions of disability used in the State for various official purposes.</p> <p>As the definition of disability for the purposes of ESF+ data returns should be standard across all ESF+ supported activities, it is recommended that the criteria used by the CSO in recent Censuses are used when deciding if a participant should be counted under this indicator. Therefore, it should be considered if the participant has any one of the following long-lasting conditions –</p> <ul style="list-style-type: none"> <li>• blindness or a serious vision impairment,</li> <li>• deafness or a severe hearing impairment,</li> <li>• a difficulty with basic physical activities such as walking, climbing stairs, reaching, lifting or carrying,</li> <li>• an intellectual disability,</li> <li>• a difficulty with learning, remembering or concentrating,</li> <li>• a psychological or emotional condition, and</li> <li>• a difficulty with pain, breathing or any other chronic illness or condition.</li> </ul> <p>In addition to the above, a person is classified as being disabled if they encounter difficulties performing any of the following activities –</p> <ul style="list-style-type: none"> <li>• dressing, bathing or getting around inside the home (self-care disability)</li> <li>• going outside the home alone to shop or visit a doctor’s surgery (going outside the home disability)</li> <li>• working at a job or business or attending school or college (employment disability)</li> <li>• participating in other activities, such as leisure or using transport</li> </ul> <p>For the purpose of recording a participant’s indicator data, it is not required to specify or record the particular conditions they have. Instead, it is recommended that participants are asked if they have any one of the conditions listed above and, if so, they should be recorded as having a disability.</p> <p>Self-declaration will suffice for ESF+ purposes, however, documentation may be required for the bursary application process.</p>	YES; NO; RBNP	Application stage
EECO13	Third country nationals	are defined as persons who are not citizens of the European Union, including stateless persons and persons with undetermined nationality.	YES; NO	Application stage
EECO14	Participants with	are defined as persons who were born outside the State, or one or both of whose parents were born	YES; NO	Application stage

	a Foreign background	<p>outside the State. In the Irish context, this should be understood to exclude persons one or both of whose parent(s) were born in Northern Ireland.</p> <p>Care should be taken to communicate clearly that all persons who either have dual nationality of both Ireland and another country or were born outside the State, may be reported as having a foreign background.</p> <p>Self-declaration will suffice for ESF+ purposes, however, documentation may be required for the bursary application process.</p>		
EECO15	Minorities (including marginalised communities such as Roma)** (special category)	<p>are defined as persons belonging to a culture or ethnicity that is identifiably distinct from the ethnic majority and which in the main, refers to persons who are from ethnic/indigenous minorities, such as the Roma or Traveller communities. Ethnic majority refers to the predominant ethnic group in society (e.g., White, Irish). Religious or any other categories of minorities should not be reported under this indicator.</p>	YES; RBNP	NO; Application stage
EECO16	Homeless or affected by housing exclusion	<p>defines a participant's housing situation. Under the Housing Act 1988 you are considered homeless if one of the following applies to you:</p> <ul style="list-style-type: none"> <li>• There is no accommodation available that, in the opinion of the local authority, you and any other person who normally lives with you, can reasonably stay or remain in</li> <li>• You are living in a hospital, county home, night shelter or other such institution, and you are living there because you have no suitable accommodation.</li> <li>• You are, in the opinion of the local authority, unable to provide accommodation from your own resources.</li> </ul> <p>In addition to the definition above there are a variety of definitions of homelessness and housing exclusion in use across Europe, and the ESF MA recommends utilising the ETHOS (European Typology on Homelessness and Housing Exclusion) typology, which refers to four types of homelessness or housing exclusion –</p> <ul style="list-style-type: none"> <li>• rooflessness, i.e., living without shelter of any kind or living rough.</li> <li>• houselessness, i.e., with a place to sleep but temporarily, such as in institutions or shelters. Persons living in “emergency accommodation” would be considered to be “houseless” in this context.</li> <li>• living in insecure housing, i.e., threatened with housing exclusion due to insecure tenancies, eviction, or domestic violence.</li> <li>• living in inadequate housing, i.e., in caravans on illegal sites, in unfit housing or extreme overcrowding.</li> </ul>	YES; NO;	Application stage
EECO17	Participants from Rural areas	<p>are defined as persons residing in thinly populated areas, according to the Degree of urbanisation (DEGURBA, category 3) classification.</p> <p>For persons living away from their family home or “permanent address” during their participation on an activity, their normal place of residence should be considered to be the permanent address they return</p>		Application stage

			<p>to from time to time.</p> <p>The European Commission guidance requires that whether a participant is from a rural area is determined by reference to the DEGURBA (DEGree of URBAinisation) classification. For the purpose of ESF monitoring, the DEGURBA classification is applied at the level of Local Administrative Unit 2, or LAU 2, which refers to a municipality or equivalent. LAUs with DEGURBA Code 3 are rural, while areas with codes 1 or 2 are urban or semi-urban.</p> <p>The place of residence of each participant can be checked against the LAU 2 classifications published by Eurostat, which be found here (see the “EU28” file in MS Excel format) - <a href="http://ec.europa.eu/eurostat/ramon/miscellaneous/index.cfm?TargetUrl=DSP_DEGURBA">http://ec.europa.eu/eurostat/ramon/miscellaneous/index.cfm?TargetUrl=DSP_DEGURBA</a></p> <p>HEIs may generate the Yes/No Rural value based on the participant address. Further guidance will be provided by the MA in due course.</p>		
<b>Result Indicators</b>	EECR01	Participants engaged in Job searching upon leaving	are defined as persons who were Inactive (see EECO04 above) when entering the operation and who are newly engaged in job searching activities upon leaving.	YES; NO	Exit survey
	EECR02	Participants in Education or training upon leaving	are defined as participants irrespective of their labour market status upon entering who were not engaged in education/training upon entry and who are newly engaged in part-time or full-time education (lifelong learning, formal education) or training activities (off-the-job/in-the-job training, vocational training, etc.) upon leaving.	YES; NO	Exit survey
	EECR03	Participants gaining a qualification upon leaving	are defined as participants irrespective of their labour market status upon entering the operation who gained a qualification upon leaving the operation.  'Qualification' means a formal outcome of an assessment and validation process which is obtained when a competent body determines that an individual has achieved learning outcomes to given standards.	YES; NO	Exit survey
	EECR04	Participants in employment, including self-employment upon leaving	only refers to participants who were Unemployed or Inactive upon entering the operation and who are in employment, including self-employment upon leaving the operation.	YES; NO	Exit survey
	EECR05	Participants in employment, including self-employment 6 months after leaving	are defined as persons who were Unemployed or Inactive when entering the operation and who are in employment, including self-employment, six months after leaving. EECR05 does not relate to persons who were in employment, including self-employment on entry to the activity.	YES; NO	Exit survey
	EECR06	Participants with an Improved	are defined as persons who were in Employment, including self-employment on entering the operation and who six months after leaving have:	YES; NO	Exit survey

		labour market situation 6 months after leaving	<ul style="list-style-type: none"> <li>transited from precarious to stable employment, or</li> <li>transited from underemployment to full employment, or</li> <li>moved to a job requiring higher competences/skills/qualifications, entailing more responsibilities, or</li> <li>received a promotion or an increase in wages that is above the annual rate of wage inflation in the country.</li> </ul> <p>‘Precarious employment’ should be understood as the "temporary employment" and "work contract of limited duration". Given institutional discrepancies, the concepts of 'temporary employment' and 'work contract of limited duration' describe situations, which, in different institutional contexts, may be considered similar.</p> <p>Employees with a limited duration job/contract are employees whose main job will terminate either after a period fixed in advance (by a known date), or after a period not known in advance, but nevertheless defined by objective criteria, such as the completion of an assignment or the period of absence of an employee temporarily replaced.</p> <p>Reporting of common longer-term indicators for participants in Actions under Specific Objectives (a-(k) may be based on a representative sample of participants. Internal validity of the sample is to be ensured in such a way that the data can be generalised at the level of the specific objective.</p>		
<b>Programme Specific</b>	PSR1	Participants successfully completing the programme	(Same as EECR05 above)	YES; NO	Exit survey