

FINANCIAL SUPPORT FOR LEARNERS POLICY AND PROCEDURE

**Policy Encompasses: 16-19 Bursary
Fund Advanced Learner Loan Bursary
Fund 19+ Discretionary Learner
Support Fund**

Introduction

16-19 Bursary Fund

This Fund is for learner financial assistance and is comprised of two elements; the Bursary Fund for Vulnerable Young People and the Discretionary Bursary Fund. It is provided by the Education and Skills Funding Agency (ESFA). This policy has been designed with the purpose of enabling those from less affluent backgrounds to access their chosen course of study so that financial hardship does not become a barrier to their learning.

The Bursary Fund consists of two elements; Vulnerable Bursaries of up to £1,200 a year designed to assist nominated vulnerable groups outlined by the ESFA, with additional costs involved with accessing Further Education and Discretionary Bursaries issued on a variable basis dependent on an assessment of household income and of what is deemed necessary for learners to access their chosen course.

Both elements of the Fund are intended to assist learners facing financial hardship to help with the cost of equipment, travel and essential course trips and various other course related expenditure; the funds may be used for a wide variety of purposes to meet individual needs.

Advanced Learner Loan Bursary (ALLBF) and 19+ Discretionary Learner Support Fund (DLSF)

The Discretionary Learner Support Fund (DLSF) and Advanced Learner Loan Bursary Fund (ALLBF) for 19+ learners are financial assistance funds comprising of post 19 discretionary and post 20 childcare funds provided by the Education & Skills Funding Agency (ESFA).

The fund is intended to be used for learners facing financial hardship to help with essential course related costs such as equipment, travel, trips, professional body membership fees and the cost of childcare while studying (for learners aged 20 and over).

Funds may be used for a wide variety of purposes to meet individual needs. This policy has been designed with the purpose of enabling those from less affluent backgrounds to access their chosen course of study so that financial hardship does not become a barrier to their learning.

Childcare Support - Support is awarded for 100% of costs (paid directly to childcare provider) to cover timetabled hours (meals are not included and any missed days for the child/ren will be at the cost of the parent) An Ofsted childcare registered provider must be used. Learners aged under 20 should apply to Care to learn www.gov.uk/care-to-learn or call **0800 121 8989**. (Eligibility for this award is provided in Appendix 1). The Bursary Officer will assess each application to ensure it meets (ESFA) eligibility criteria and will process scheduled payments to learners.

For all Funds applications for support are considered individually to ensure that those in need receive help. Due to the nature of an individual's circumstances, consideration for assistance will be given according to need and Discretionary awards will be granted based on the information provided. Funds will only be granted where a genuine need for assistance has been demonstrated and not all applications are successful.

Discretionary awards will be granted based on the information provided at application and in the main on production of evidence of household income. For the purposes of these funds it is deemed that households with an income below £30,000 per annum are those most in need and will receive assistance. It is however recognised that production of income evidence is not always possible and that there may be instances when funding is issued without production of that evidence, if for example it would mean that a learner could not continue attending their course or if an emergency arose. It is also recognised that the Funds (with the exception of the Vulnerable Bursary Fund) are

cash limited and as such not all applications to the Funds are necessarily successful – the Trust will only continue to allocate and issue funding for as long as the budget allows.

Eligibility for Bursary Funding

To be eligible to receive any Bursary learners must:

- Be enrolled on an eligible course funded by either the ESFA will not be paid to learners who are not enrolled, or where an enrolment is pending
- Meet the residency and other eligibility criteria as set out in the *ESFA Funding Rules*
- Be aged 16 or over and under 19 on 31st August 2023 for the 16-18 Bursary Fund. Learners aged 19 or over are only eligible to receive a discretionary bursary if they are continuing on a study programme they began aged 16 to 18 (19+ continuers) or have an Education, Health and Care Plan (EHCP).
- Be aged 19 or over on 31/08/2023 for DLSF/ALLBF or aged 20 or over on 31/08/2023 for DLSF/ALLBF for Childcare
- Learners applying to the ALLBF must have been assessed and found to be eligible for an Advanced Learning Loan.

Further to this list, learners must also meet the following eligibility criteria depending on the type of award.

1. Bursaries for Vulnerable Young People

Learners must be in one of the following categories of vulnerable groups and provide documentary evidence of such:

- Those in receipt of Income Support (IS) or Universal Credit. (UC) because they are financially supporting themselves or financially supporting themselves and someone who is dependent on them and living with them, such as a child or partner
- Those in Care or registered as a Care Leavers. This includes unaccompanied asylum- seeking children
- Those who have a disability and are in receipt of Employment & Support Allowance **and** Disability living Allowance or Personal Independence Payment

Now that Universal Credit has been fully rolled out, young people aged 16 to 18 will no longer be in receipt of the other benefits listed above. However, learners aged 19 to 25 and funded from the 16 to 19 budget (19+ continuers and those with an EHCP) may still be in receipt of these other legacy benefits.

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

Learners should only receive the amount they actually need to participate, and the Trust will not automatically award learners £1,200 if they do not need the full amount.

The criteria and eligibility for bursary funding is available in Appendix 1

2.16 to 19 Discretionary Bursaries

- In most cases, learners should be able to demonstrate financial hardship. Evidence of income and/or status is required. Learners who can provide evidence that their household income falls below the threshold set by the Trust will be deemed as having demonstrated financial hardship. In some cases, where the provision of such evidence is impossible the Trust may accept other means to demonstrate financial hardship such as a letter from parent/support worker or self-declaration and bank statement. Such cases will be dealt with and assessed on an individual basis
- Learners can access funding for what are deemed essential course related costs payments can be made in-kind
- The Trust reserves the right to make awards to learners who appear to be outside the financial criteria, based on individual and exceptional circumstances.

The criteria and eligibility for bursary funding is available in Appendix 1

19+ Discretionary Learner Support Fund

The Discretionary Learner Support Fund provided by the Education & Skills Funding Agency is an award for learners over 19 years old on 31st August 2023 (or aged 19-24 with an Education Health Care Plan) if they are:

- Studying a 'funded' course within the Trust
- Not in receipt of an Advanced Learner Loan
- They cannot obtain support elsewhere. For example, if you receive benefits (Universal Credit), they must contact their Job Coach to check if they are eligible for support with travel or childcare before applying to us.
- A UK resident or meet sufficient residency criteria.

The criteria and eligibility for bursary funding is available in Appendix 2

Childcare Support - support is awarded for 100% of costs (paid directly to childcare provider) to cover timetabled hours (meals are not included and any missed days for the child/ren will be at the cost of the parent) An Ofsted childcare registered provider must be used. (Eligibility for this award is provided in Appendix 1).

Free College Meals (up to £4.00 per day)

If you are aged 19 or over you may be eligible if you are continuing on a study programme you began aged 16 to 18 (19+ continuers) or you have an Education Health and Care Plan. (Eligibility for this award is provided in Appendix 2)

For all funds applications for support are considered individually to ensure that those in need receive help. Due to the nature of an individual's circumstances, consideration for assistance will be given according to need and discretionary awards will be granted based on the information provided. Funds will only be granted where a genuine need for assistance has been demonstrated and not all applications are successful.

The criteria and eligibility for bursary funding is available in

3. Assessment of Applications

Applications must be made on-line through the college website (in exceptional circumstances applications can be paper based). The Trust aims to ensure that the funds available to support learners are distributed wisely and fairly, allocated according to individuals' own circumstances and the costs associated with their chosen course, used to widen access to and participation in Further Education and used to support priority groups as defined by the ESFA and as appropriate to the local area.

Assessment of Applications for Bursaries for Vulnerable Young People:

Learners must provide evidence of their circumstances to confirm that they are in the vulnerable groups as defined in point 2. Acceptable forms of evidence are:

- **For those in Care or registered as a Care Leavers:** Written confirmation of the young person's current or previous looked-after status from the Local Authority which looks after them or provides their Care Leaving services.
- **For those in receipt of Income Support or Universal Credit:** A letter setting out the benefit to which the young person is entitled or a recent bank statement showing receipt of benefit or a screenshot of proof of receipt Universal Credit in the learner's own name
- **For those who are disabled and are in receipt of Employment & Support Allowance and Disability Living Allowance or Personal Independence Payments:** A letter setting out each of the benefits to which the young person is entitled

Assessment of Discretionary Bursaries

- Learners will be assessed on annual net household income taking into account the learner's partner or parent/guardians as appropriate. Awards will not normally be made where a learner's household income is above £30,000pa unless significant financial hardship can be evidenced.
- Where a learner lives with a partner, the income of both the learner and the learner's partner will be used.
- Learners in receipt of/ or a dependent of somebody in receipt of income-assessed benefits will be awarded the highest level of funding.
- Where a learner's household income changes during the academic year, the learner may apply to be reassessed based on the new household income
- Where a learner is aged 19 or over and lives with their parent(s), each case will be assessed individually to decide whether or not they are financially independent. The Trust will usually require written confirmation from a parent/guardian that the learner is deemed financially independent and is in receipt of their own income

In the main applications require evidence of income to be provided. Evidence may include:

- Most recent Tax Credit Award Notice (TCAN) – all pages. The figure used for assessment will be the earned income figure included for the previous tax year
- Screen shot of the last 3 months Universal Credit Statements including any earned income and deductions
- Photocopies of latest 8 (weekly) or 3 (monthly) pay slips
- A letter from current employer as proof of wage
- P60 issued by current employer
- Photocopies of benefit award letters or bank statements no more than 6 months old
- Details of accounts for self-employment.

If it is the case that the provision of such evidence is impossible the Trust may accept other means to demonstrate financial hardship such as a letter from parent/support worker or self-declaration and bank statement. Such cases will be dealt with and assessed on an individual basis and awards will be allocated at the discretion of the Trust.

Learners who withdraw

Any learner who withdraws from College may be asked to return any items purchased or repay any financial assistance in full.

False or fraudulent applications

Where learners are found to have intentionally given misleading or inaccurate information the Trust will claim back the award made. Providing false statements may result in learners being sanctioned in accordance with the Trust's Disciplinary Policy.

Right of Appeal

In the event that the learner disagrees with the financial assessment made by the Bursary Officer **or** if the learner has been assessed as not eligible for support and deems that they will be unable to access their course without funding then they should appeal in writing by letter or email to the Bursary team and then reviewed by the appropriate Vice Principal, who will review the assessment and respond accordingly.

Please note that if a learner is eligible for financial assistance, this does not guarantee that funding will be provided (unless learners are eligible for the Bursary for Vulnerable Young People element). Due to high levels of demand for funding, all allocations are based on priority need. Allocations will be made on this basis until all monies have been spent.

Appendix 1

16 – 19 Bursary Fund Matrix 2023/24	Learners must be aged 16- 18 on or before 31/08/2023 & enrolled on a full-time course	
<p><u>Category 1 – Full Guaranteed Bursary</u></p> <p>Learner is in care or is a care leaver aged 16-18</p> <p>Claims (in their own right) Universal Credit or Income Support</p> <p>Claims (in their own right) Employment Support Allowance (plus either Disability Living Allowance OR Personal Independence Payments) Where the College believes that a young person’s situation merits it (exceptional circumstances – service manager approval needed)</p>	<p>Fully funded travel pass</p> <p>Essential Course Costs</p> <p>Further Education Free Meals (FEFM)</p>	<p>NOTES</p> <p>Payment is subject to 90% attendance and meeting required behavioral standards</p>
<p><u>Category 2 – (Discretionary) Enhanced Travel support/Further Education Free Meals</u></p> <p>Learner/their household claims:</p> <p>Universal Credit- and income must be less than £7,400 pa (after tax and not including any benefits)</p> <p>Household income of up to £16,190,</p> <p>*If learner has EHCP see additional relevant benefits section.*</p> <p><u>Only available to learners living 1+ miles from college</u></p>	<p>Fully Funded Bus Pass</p> <p>PLUS</p> <p>Further Education Free Meals (FEFM)</p> <p>PLUS</p> <p>Essential course costs</p>	<p>Google maps walking route to College</p> <p>Trust's FEFM Criteria is based on ESFA Guidance</p> <p>Subject to 90% attendance and meeting required behavioral standards</p>

<p><u>Category 3 – (Discretionary)</u></p> <p>Household income between £16,191 - £25,000 pa</p> <p>Household income from £7,401pa AND in receipt of UC</p> <p><u>Only available to learners living 1+ miles from college</u></p>	<p>Fully Funded Bus Pass</p> <p>PLUS</p> <p>Meal Allowance £4.00</p> <p>PLUS</p> <p>Essential Course Costs</p> <p>(Only available to households under £27,000 pa)</p>	<p>Google maps walking route to College</p> <p>Subject to 90% attendance and meeting required behavioral standards</p>
<p><u>Category 4 – (Discretionary)</u></p> <p>Household income between £25,001 - £30,000 pa</p> <p><u>Only available to learners living 1+ miles from college</u></p>	<p>Fully Funded Bus Pass</p> <p>PLUS</p> <p>Essential Course Costs</p> <p>(Only available to households under £27,000 pa)</p>	<p>Google maps walking route to College</p> <p>Subject to 90% attendance and meeting required behavioral standards</p>
<p><u>Category 5 – (Discretionary) Subsidised Travel 3</u></p> <p>Household income between £30,001 - £40,000 pa</p> <p><u>Only available to learners living 1+ miles from college</u></p>	<p>Discounted Travel pass</p> <p><u>Contribution £50.00 per term (£150.00 annual)</u></p>	<p>Google maps walking route to College</p> <p>Subject to 90% attendance and meeting required behavioral standards</p>

EHCP learners may come from households in receipt of legacy benefits and will be eligible for Category 2 funding if the household claims:

- Income Support
- Income-based Job seeker's Allowance
- Income-related Employment and Support Allowance
- Support under Part VI of the Immigration and Asylum Act 1999
- The guaranteed element of Pension Credit
- Child Tax Credit (**provided they are not entitled to Working Tax Credit and have annual income of no more than £16,190**)
- Working Tax Credit run on (paid for 4 weeks after Working Tax Credit)

List of benefits to 'disregard' or 'regard' as income when assessing a bursary application

Disregarded Income

- Universal Credit
- Income Support
- Income-based Jobseeker's Allowance (JSA)
- Pension Credit – Guaranteed
- Child Benefit
- Child Tax Credit
- Working Tax Credit
- Personal Independence Payment (PIP)
- Employment and Support Allowance (ESA)
- New Deal 50+ Employment Credit
- Attendance Allowance
- Housing Benefit
- Council Tax Benefit
- Industrial Injuries Disablement Benefit
- Maternity Allowance
- Maintenance received from a former partner
- Learner loans or grants (except Adult Dependents Grant) to meet the cost of tuition fees, childcare etc.
- Parents Learning Allowance
- Pension Christmas Bonus
- Income dependent's children may have (up to £2,000 p.a.)
- Winter Fuel Payment
- War pensions (or pensions or annuities payable under the German or Austrian law to victims of Nazi persecution)
- NHS Bursaries
- Tax Free Savings (e.g. ISAs, TESSAs, PEPs)

Include as Income

- Carer's Allowance
- State Pension
- Contribution-based Jobseekers Allowance (JSA)

Appendix 2

Eligibility: 19+ Bursary Learner Financial support Fund 2023/24

- Over 19 years old on **31/08/2023** (or 19-24 with an Educational Health Care Plan)
- Studying a 'funded' course at the College
- Not in receipt of an Advanced Learner Loan
- Learner cannot obtain support elsewhere. For example, if you receive benefits (like Universal Credit), you must contact your Job Coach to check if you are eligible for support with travel or childcare before applying to us
- A UK resident or meet sufficient residency criteria

Full time Learner's Bursary	Part-time Learner's Bursary
Level of support Assistance with Essential Course Costs Fully Funded Bus Pass Meal Allowance £4.00 per day	Level of support Assistance with Essential Course Costs Fully Funded Bus Pass
Eligibility Household income of up to £30,000 per year or in receipt of an income assessed benefit At least 90% attendance per term Studying a full-time government funded course	Eligibility Household income of up to £30,000 per year or in receipt of an income assessed benefit At least 90% attendance per term Studying a government funded course of 150+ guided learning hours per year

Childcare Support
Level of Support Support with 100% of costs (paid directly to childcare provider) to cover timetabled hours (meals are NOT included and any missed days for the child/ren will be at the cost of the parent)
Eligibility Household income of up to £30,000 per year or in receipt of an income assessed benefit Aged 20 years or over (Learners aged under 20 should apply to Care to Learn www.gov.uk/care-to-learn or call 0800 121 8989) Studying a government funded course of 150+ guided learning hours per year Using an Ofsted registered childcare provider Not receiving funded support from another source

Free College Meals (Up to £4.00 per day)
Eligibility If you are aged 19 or over you may be eligible if you are continuing on a study program you began aged 16 to 18 ('19+ continuers') - or if you have an Education, Health and Care Plan (EHCP).

Appendix 3

ELIGIBILITY: Advanced Learner Loan Bursary Fund 2022/23

- Over 19 years old on **31/08/2023** (or 19-24 with an Educational Health Care Plan)
- In receipt of an Advanced Learner Loan approved by the Learner Loans Company
- Studying a 'funded' course at the College (**work-based learning or apprenticeships are not eligible**)
- Learner cannot obtain support elsewhere. For example, if you receive benefits (like Universal Credit), you must contact your Job Coach to check if you are eligible for support with travel or childcare before applying to us
- A UK resident or meet sufficient residency criteria

Full-Time Learners Bursary	Part-Time Learners Bursary
Level of support Assistance with Essential Course Costs Fully Funded Bus Pass Meal allowance £4.00 per day	Level of support Assistance with Essential Course Costs Fully Funded Bus Pass
Eligibility Household income of up to £30,000 per year or in receipt of an income assessed benefit At least 90% attendance per term Studying a full-time government funded course with a minimum of 12 guided learning hours per week	Eligibility Household income of up to £30,000 per year or in receipt of an income assessed benefit At least 90% attendance per term Studying a government funded course of 150+ guided learning hours per year

Childcare Support
Level of support Support with 100% of costs (paid directly to childcare provider) to cover timetabled hours (meals are NOT included and any missed days for the children will be at the cost of the parent)
Eligibility Household income of up to £30,000 per year or in receipt of an income assessed benefit Aged 20 years or over (Learners aged under 20 should apply to Care to Learn www.gov.uk/care-to-learn or call 0800 121 8989) Studying a government funded course of 150+ guided learning hours per year Using an Ofsted registered childcare provider Not receiving funded support from another source