

# BURSARY FUND/

# DISCRETIONARY LEARNER SUPPORT FUND

# POLICY & PROCEDURES

**2019/2020**

16-18 Bursary Fund

19+ Bursary Fund

Advanced Learner Loan Bursary Fund

Traineeships Bursary Fund

HE Bursary Fund

Agreed at SMT

Authors: Helen Basnett, Learner Services Manager

Review date: 1st July 2019

Reviewed by: Helen Basnett, Learner Services Manager

Date: 7th June 2019

Next Review: 1st July 2020

**Contents**

|  |  |  |
| --- | --- | --- |
|  |  | Page |
| Section 1. | Introduction | 3 |
| Section 2. | Policy Aims | 3 |
| Section 3. | Criteria & Eligibility | 3 |
| Section 4. | Responsibilities | 4 |
| Section 5. | Procedure | 6 |
| Section 6. | Appeals | 6 |
| Section 7. | Timing & Amounts of payment | 6 |
| Section 8. | Review of policy | 6 |
|  |  |  |
|  |  |  |
|  |  |  |
|  | Appendices | 7 |
| Appendix 1 | Bursary Fund Process Chart -classroom | 8 |
| Appendix 2 | Bursary Fund Process Flowchart – Traineeships | 9 |
| Appendix 3 | Criteria and eligibility for payment | 10 |
| Appendix 4 | Timing and Amount of Payments | 15 |
| Appendix 5 | Indicative Payment Thresholds – 2016/17 | 16 |

# Introduction

## Bursary funds or discretionary learning support funds are paid by the Education and Skills Funding Agency (ESFA) to the College so that they may provide financial help to learners whose access to, or completion of education, might be inhibited by financial constraints (this includes learners on traineeships).

The learner’s individual needs and local circumstances will be considered when allocations are made to ensure every young person and adult participates in and benefits from a place in education and training.

## They may be used for a variety of costs incurred whilst learning which may include:

* Travel
* Equipment (including books and clothing)\*
* Registration fees\*
* Childcare\*\*
* Hardship costs
* Residential and educational visits (including costs of travel to HE interviews or Open Days)
* Meals
* Additional Learning Support (ALS) (Advanced Learner Loan only)

\* Excluding Advanced Learner Loan Bursaries

\*\*Award based on timetabled hours. The College retains the right to assess individual cases where necessary.

Learners who are self-funding courses, without using an Advanced Learner Loan are not eligible to apply for bursary funds.

# 2. Policy Aims

2.1 To ensure funds are allocated to assist learners in reducing barriers to education.

2.2 To try to eliminate the gap in achievement between those learners experiencing the greatest financial hardship and those from more affluent backgrounds.

2.3 To encourage engagement with the programme of study for those from disadvantaged backgrounds by providing financial support.

2.4 To ensure that the Bursary Funds are administered in accordance with ESFA guidelines and policies.

2.5 To describe the eligibility criteria, how the bursary is calculated and how payments are processed.

1. **Criteria and Eligibility for Bursary Funds**

Each of the bursary funds have specific details of eligibility and fund use. These are described in Appendix 3

# 4. Responsibilities

# Learner

* Learners making applications will provide accurate information and submit the documentary evidence and sign appropriate declarations.
* Learners in receipt of a bursary award should comply with College rules and regulations as detailed in the Code of Conduct/Enrolment Form.
* Learners must reach the criterion of attendance, behaviour and progression to receive payments.
* Learners must inform the college of changes in their home or financial circumstances.

# Student Services

* Assist the learner to make an appropriate application by ensuring the application form is completed fully and that correct documentary evidence is provided and copied where appropriate.
* Log application, check for duplicates and process application.
* Ensure that the learner’s attendance meets 91% for payment.

# Bursary Fund Manager (designated to Student Services Manager)

* Oversee the administration of the fund within Student Services.
* Make decisions on applications with Finance.
* Ensure that reasons for the panel’s decision are accurately recorded.
* Liaise with Finance (i) to ensure timely payment of bursary funds (ii) to ensure that audit requirements are met.
* Produce reports and administration of the fund to the managing body.
* Ensure the fund is publicised in an appropriate manner.
* Provide regular reports to Heads of Department/Senior Leadership Team.

# Bursary Fund Panel

* This will comprise the Finance Officer, the Learner Data Services Manager and the Bursary Fund Manager or a nominated deputy from the Student Services Department.
* The panel will sample applications and ensure that awards are granted fairly and equitably in accordance with the fund guidelines.
* A sample of applications will be audited by a Member of Senior Leadership (SLT).

**4.5 The Appeals Panel**

* The Appeals Panel will consist of the two members of the SLT usually including the Deputy Principal – Learning & Quality.

# Finance

* Ensure funds are paid to learners in accordance with the decisions of the panel.
* Administer the cash-flow in accordance with audit and funding body requirements.
* Liaise with Bursary Fund Manager to ensure that audit requirements are met.
* To provide financial information to Bursary Fund Manager for the regular reports to SLT.
  1. **Advisory Board**
* Receive reports from SLT – detailing the take-up against the criteria used and a financial impact analysis of the expenditure by category of support.

# Procedure

To make an application a learner must complete an application form with documentary evidence and submit this to Student Services. Students participating on a Traineeship delivered by a subcontractor of the College should consult with their nominated contact.

Student Services staff will check eligibility and ensure that appropriate documentary evidence is provided. Copies or scans of submitted evidence will be held for auditing purposes.

Student Services will record the application and, based on evidence provided calculate the Learner’s allocation.

Student Services will send the learner a letter outlining their allocation. If the Learner has not yet enrolled the award will be dependent on their enrolment and payment will not be made until this is verified. After enrolment, all bursary forms will be processed so that a payment schedule can be set up.

Student Services will then ensure that (i) at least 91% attendance has been met or (ii) highligh non-attendance and provide communication with tutors. This will be an opportunity to investigate any welfare related issues attached to non-attendance.

In cases where payment is made to a third party (e.g. childcare) it will be the responsibility of Finance to ensure this occurs. The Finance will retain these forms securely on file for 6 years.

The Deputy Principal – Learning & Quality will audit 10 per cent of application forms twice each year and decisions made to ensure that the college is complying with guidelines.

This procedure is illustrated in the Process Flow Chart in Appendix 1

For the procedure associated with applications to support learners on subcontracted Traineeship provision please see Process Flow Chart in Appendix 2

# Appeals Procedure

Learners who consider that their claim has been inappropriately assessed can appeal in writing to the Deputy Principal – Learning & Quality giving reasons, within 4 weeks of receiving their notification letter. They should clearly outline what is being appealed and why they believe the decision to be incorrect. Additional evidence to support the appeal will be required.

The Deputy Principal – Learning & Quality will arrange a meeting of the Appeal Panel within 10 working days. The claim will be reassessed and the learner informed of the decision in writing within 5 working days of the Panel meeting.

# Timing and Amount of Payments

See Appendix 4 and 5

# Review of Policy

The policy will be reviewed annually by the Bursary Fund Panel in accordance with recommendations from the College’s audit services and funding body requirements.

#### APPENDICES

Appendix 1: **Bursary fund process chart – Classroom Learning**

**Learner** completes application, compiles evidence and submits with application form to Student Services to review.

**Student Services** will (i) check eligibility, (ii) copy evidence, calculate indicative amounts and input learner claim onto Bursary Fund database.

Application approved

Application not approved / funding not available

**Student Services** sends letter confirming bursary not approved, detailing explanation and outlining appeals process.

Enrolled learners

Non-enrolled learners

**Student Services** sends letter confirming bursary description and amounts awarded and frequency of payment. Childcare form enclosed if appropriate

**Student Services** sends letter confirming bursary amounts agreement in principle prior to enrolment.

**Learner** appeals in writing to **Deputy Principal** outlining reasons for appeal.

Enrolment confirmed

**Student Services** processes Application form, documentation and learner correspondence so that payment by bank transfer can be orgamised. Where third party is involved (eg childcare provider) appropriate payment is made.

**Learner** appeal upheld

**Deputy Principal** convenes an Appeals Panel and a decision is made.

**Learner** appeal rejected and learner notified of decision

Learner not satisfied with allocation

*NB. LAC Learner Bursaries can only be paid on receipt of letter of confirmation from Social Worker*

**Appendix 2**

**Bursary Fund Process Flowchart – Traineeships**

**Appendix 3**

**Learner** appeal rejected and learner notified of decision

Appeals Panel convenes, decision

made

**Learner/Subcontractor**

Learner receives explanatory notice and detail of award in writing

**If learner wishes to appeal they must send a letter giving** reasons **to their nominated contact who will forward to the Head of Department Business and Training**

#### Finance Office

The Finance Office organises recharge, appropriate payment is transferred.

#### Traineeship/Contract Co-ordinator

The Traineeship/Contract Co-ordinator will advise learners/subcontractor of outcomes of applications, will raise a purchase order, advise the subcontractor of the amount to be invoiced, and submit a the recharge template to the Finance Officer

**Learner Services**

Administrator inputs learner claim details onto Bursary Fund database and sends letter confirming support once enrolment status is confirmed & copies to Traineeship/Contract Co-ordinator. Copy of confirmation letter, payment form and application form are passed to Finance Officer.

.

### Bursary Fund Manager

Makes decision in principle in accordance with fund guidelines. .

## Nominated Contact (subcontractor)

Nominated contact advises learner on making appropriate application. Necessary documentary evidence of learners’ financial circumstances checked and recorded. All completed original forms to be sent to the Traineeship/Contract Co-ordinator at Kidderminster College, who will liaise with the Bursary Fund Manager for a decision**.**

Appeal Upheld

# Learner

Learner obtains an application form from their nominated contact

## CRITERIA AND ELIGIBILITY FOR PAYMENT

## 16 to 18 year old Learners

The College has been allocated a fixed sum of money for the 16-18 Bursary Fund. Five per cent of the total will contribute towards centre administrative costs, while an appropriate contingency will be held back in the first instance for applications during the course of the year. The funds will be prioritised and allocated as follows:

To be eligible to receive a 16-18 Bursary in the 2019/20 academic year, the young person must be aged under 19 at the start of the academic year in which they start their programme of study (the start of the 2019/20 academic year is 31 August 2019). Where a young person turns 19 during their programme of study, they can continue to be supported to the end of the academic year in which they turn 19, or to the end of the programme of study, whichever is sooner. In general, bursaries should be paid only to young people who have reached 16. Providers may, in exceptional circumstances, use their discretion to pay bursaries to younger students – for example, if they are following an accelerated programme.

Young people should satisfy the residency criteria in the ESFA Funding Guidance for 2019/20.

Young people should be participating in provision that is subject to inspection by a public body that assures quality (e.g. Ofsted). That provision must also be:

* funded by the ESFA (either directly or via a local authority); or
* otherwise publicly funded and lead to a qualification (up to level 3) that is accredited by Ofqual or is pursuant to Section 98 of the Learning and Skills Act 2000.
* a 16-19 traineeship programme

**Accompanied asylum seeking children (under 18 with an adult relative or partner)**

Generally asylum seekers are not entitled to public funds. Accompanied asylum seeking children aged under 18 with an adult relative or partner, and those aged 18 and above are entitled to education – but not to public funds. As long as an asylum seeker has not had an application refused, College can provide in kind support such as course related books, equipment or travel pass. Under no circumstances can an institution give cash.

**Unaccompanied Asylum seeking children**

Unaccompanied asylum seeking children do not receive cash support from the Home Office and are the responsibility of the local authority. They are treated as Looked after Children and are eligible for the Vulnerability/Guaranteed bursary

**A: Guaranteed Bursary**

These learners will receive £1200 for the year based on enrolling on a full-time course (ESFA funded) and meeting the conditions below: (Pro-rata for courses lasting less than 30 weeks a year).

**Guaranteed/Vulnerability Bursary Learners are**:

* Young people in care (including unaccompanied asylum seeking children)
* Care leavers (including unaccompanied asylum seeking children now 18 with a consideration of immigration status). Care leaver is defined as an individual 16-17 who was looked after consecutively for 13 weeks (or periods totalling 13 weeks) between the ages of 14-16 **or** a young person who is 18 who was looked after consecutively for 13 weeks between the ages of 14-16.
* Young people **personally** in receipt of Income Support or Universal Credit in their own right.
* Young people in receipt of **both** Disability Living Allowance or Personal Independence Payments **and** Employment Support Allowance (ESA) (or Universal Credit as a replacement for (ESA) in their own right.

Learners do not need to live independently from their parents to still claim Employment Support Allowance or Universal Credit in their own right while living in the parental home. Universal Credit notifications will not normally detail the benefit that is being replaced. This needs to be clarified by the applicant but if this is not known then the college will assume that it is replacing Income support and will designate the bursary.

Allocations from the college Bursary Fund will be made upon receipt of application and proof of eligibility. The following documents will help to prove eligibility for a Guaranteed Bursary: letter from local authority of care status or appropriate evidence from DWP regarding other applicants. Where the allocation is for Young people in care, no monies will be paid without a letter of confirmation from their social worker.

**B: Discretionary Bursary**

Learners’ household income must be within the set thresholds laid down by the College. It is our aim to target funding to those most in need on a first come, first served basis. This will take into consideration actual financial need and evidence should be retained for auditing purposes.

**Shared Residual Allocations:** The remaining sum (“residual fund”), i.e. after the Guaranteed Bursary deductions above have been made, will be allocated as follows;

### Childcare (Learners aged 16-19)

All 16-19 year olds with childcare needs to be referred to CARE2LEARN.

Payments will be made based on 91% attendance as evidenced by the college register system or in exceptional circumstances approval made at the college’s discretion and evidenced for audit purposes. Payments may be withheld if inappropriate standards of behaviour has been demonstrated; this could include non-submission of work.

Learners will only be paid during absence in exceptional circumstances. If a learner is excluded from College, or their Traineeship course, no payments will be made.

Eligible applicants are identified as falling under one of the four Learner Tiers of Need below:

**Learner Tier A(i)** – Learners who have successfully claimed Free School Meals for the current academic year (or in year 11 if FE college) or whose household income is less than £16,190 and not in receipt of Working Tax Credit

**Learner Tier A(ii)**– Learners whose **Household income** is less than £16,190

**Learner Tier B** – Learners whose **Household income** is between £16,191 and £24,000

**Learner Tier C** – Learners whose **Household income** is between £24,001 and £30,000

Allocations from the college Bursary Fund will be made upon receipt of application and proof of eligibility. The following documents will help to prove eligibility for a Discretionary Bursary:

|  |  |
| --- | --- |
| **Benefit/Income** | **Evidence** |
| P60/Payslips/Self-Employed Accounts or Tax Assessment | No more than 1 year old or three most recent payslips |
| Job Seekers Allowance (JSA)  Employment Support Allowance | Letter stating entitlement dated in the last 3 months of the enrolment date |
| Employment Support Allowance (work related activity group) | Letter stating entitlement dated in the last 3 months of the enrolment date |
| Income Support | Entitlement notice or current bank statement dated in the last 3 months of the enrolment date |
| Child Tax Credit | Current Annual Entitlement Notice |
| Council Tax Benefit | Entitlement notice dated in the last 3 months of the enrolment date |
| Housing Benefit | Entitlement notice dated in the last 3 months of the enrolment date |
| Universal Credits/National Insurance Credits | Entitlement notice dated in the last 3 months of the enrolment date |
| Working Tax Credit & Child Tax Credit | Current Annual Entitlement Notice |
| State Pension and Pension Credit | Entitlement Notice |

**2. Adult Learners (19+ Bursary Fund)**

Learners who meet all of the following criteria may apply:

* Studying a recognised funded course of Adult Skills Learner provision (including Traineeships).
* Meets the residency criteria as laid down in the Funding Guidance 2019/2020; Learner Eligibility Guidance (refugees are exempt from the three-year residency rule).
* Payments will be made based on 91% attendance as evidenced by the College register system or in exceptional circumstances approval made by the personal tutor. Learners must demonstrate appropriate standards of behaviour. Payments may be withheld if standards of behaviour have not been demonstrated; this could include non-submission of work.

Learners are not eligible to apply if:

* A learner is in prison or a young offender on temporary licence e.g day release.
* Any learner aged 19+ embarking on level 3+ study.
* Learners already receiving help with travel or childcare costs from Jobcentre Plus or a Work Programme Provider in connection with pre-employment training.

In assessing claims, the College will ensure equality of opportunity in line with its policy.

The College will also take account of other grants that have been awarded to the applicant and will be used to determine if additional funding is to be granted. This funding is available to increase access, retention and achievement.

In allocating funds, the College will ensure that learners are aware of the implications of funding for any state benefits and claimants on state benefits should declare this. Similarly, learners in receipt of assistance for childcare and travel costs through help via Jobcentre plus should inform the College of this assistance. Learners must provide the appropriate documentary evidence as per section B.

**Childcare (20+) provision for adults**

Childcare can be supported provided children are placed in the care of registered Ofsted providers and invoices are generated from the provider. After the initial period where learners are expected to pay for childcare (this will be reimbursed if an allocation is made) payments will then be made to the provider directly. Learners must provide the appropriate documentary evidence as per section B. Childcare will be paid for time at college or in placement only.

**3. 19+ Adult Learning Loan Bursary Fund**

The 19+ Adult Learning Loan is a financial assistance fund comprising of post-19 discretionary, childcare, residential and additional learning support funds provided by the ESFA. The fund is intended to be used for learners facing financial hardship to help with essential course related costs such as equipment, books, travel, visits, attending HE interviews, rent, and childcare for students aged 19 and over and in receipt of a 19+ Advanced Learning Loan.

Specific eligibility criteria:

* Learners must be aged 19 or over on the first day of the course.
* Learners must be enrolled to an eligible course; eligible courses are those for which a 19+ Advanced Learning Loan is payable; awards will not be made to learners who are not enrolled, or where an enrolment is pending.
* Learners must be in receipt of a 19+ Advanced Learning Loan; awards will not be made to learners who have not applied for a 19+ Advanced Learning Loan or where a 19+Advanced Learning Loan has been refused.
* Learners studying a non-loans funded course will not be eligible for any funding.
* Learners must be able to demonstrate financial hardship; evidence of the appropriate documentary evidence including income is required as per section B.
* The College reserves the right to make awards to learners who appear to be outside the financial criteria, based on individual and exceptional circumstances.
* Learners must meet the residency and other eligibility criteria as set out in the SFA’s Funding Rules 2017/2018.
* Awards made from the 19+ Adult Learning Loan Bursary are subject to funds and support for additional learning support will be given priority.

1. **Traineeships**

**16-18 year old learners**

All 16-18 year olds participating on a traineeship will be eligible for support with travel costs subject to eligibility under one of the four categories outlined in the Discretionary Bursary section of this policy and satisfactory completion of the ‘16-18 year olds - Traineeships Travel Application 2019/2020, including confirmation that their financial circumstances constitute a barrier to learning, and without assistance would be unable to undertake my chosen course and to participate in training.

**19-24 year old learners**

Learners aged 19-24 participating on a traineeship will be eligible for support with travel costs, subject to satisfactory completion of the ‘19-24 year olds - Traineeships Travel Application 2019/2020, including confirmation that their financial circumstances constitute a barrier to learning, and without assistance would be unable to undertake my chosen course and to participate in training.

1. **Higher Education**

New full time directly funded higher education students studying at Kidderminster College and paying tuition fees will be eligible for a Kidderminster College Higher Education Bursary of £1,000 or £400 dependant on postcode. This is not normally repayable but is subject to continuation of study and may be suspended if the College is owed any fees or temporary loans

The £1,000/£400 will be paid across the academic year.

Semester 1 £500/£200 9th-13th December

Semester 2 £500/£200 9th-13th March

**Appendix 4**

#### BURSARY FUND

#### Timing and Amount of Payments

1. Learners are only eligible for payments if they are legitimately enrolled and attending as defined by the criteria.
2. Applications for 2019/20 Bursary Funds may be made in the time periods below:

**2.1 Guaranteed Bursary (e.g. LAC Learners)**

You can use any of these colours for header and sub-headers throughout this document (max. two colours for headers plus grey for main body text)   
  
text   
text   
text   
text   
text   
text

Release date second week in October and monthly thereafter

**2.2 Applications for FE Bursaries made by the end of September**

Release date of payment will be October 2019.

**2.3 In Year Applications:**

Guaranteed and Tier A approved applications including traineeship applications will receive a response within10 working days of submission.

Other applications will receive payment in the next month following approval.

1. Payment Schedule:

Payment Date – Classroom Learning & Traineeships

For general payment submissions and any receipt based claims made

|  |  |
| --- | --- |
| **Submitted by end of September (3 terms)** |  |
| Term 1: October | 10% of allocation |
| Monthly from November until July | 10% of allocation x 9 months |

|  |  |
| --- | --- |
| **Submitted by deadline in February (2 terms)** |  |
| Term 2: February | 50% of allocation |
| Monthly from March until July: End of second week | 10% of allocation x 5 months |

|  |  |
| --- | --- |
| **Submitted by deadline in May (1 term)** |  |
| Term 3: May | 80% of allocation |
| Monthly from June until July: End of second week | 10% of allocation x 2 months |

**Payment Date – HE Bursary Amount**

Semester 1 (9th - 13th December) £500/£200

Semester 2 (9th – 13th March) £500/£200

**Important Notes**

* In certain cases, payments may not be made direct to the learner or may only be made on production of a valid invoice or receipt.
* Learners should ensure they have a bank account in their own name in which to receive funds.
* Bursary Funds are repayable should a learner not complete the course.

**Appendix 5: Indicative Payment Thresholds – 2019/20**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **16-18** | **Payments** | **Travel** | **Educational Visits – Up to** | **Uniform/Clothing/Equipment/Books** |
| Guaranteed Group  LAC or Income Support dependent young people | £1200  (£120 per month) | Up to 100% of travel costs for Residents outside of a 1.5 mile radius | Up to 100% of event costs dependant on curriculum offering | Up to 100% of costs dependant on curriculum requirements |
| Learners **eligible for free school meals** <£16,190k family income not in receipt of WTC (**Tier A(i))** | £525  (£52.50 per month) |
| Learners in household of <£16,190 family income and in receipt of WTC **(Tier A(ii))** | £525  (£52.50 per month) |
| Learners in household of <£24,000k **(Tier B)** | £375 |
| Learners in household of <£30,000k **(Tier C)** | £270 |
| **19+ Learners** | **Tuition/Admin**  **Bursary** | **Travel** | **Childcare** | **Uniform/Clothing/**  **Equipment/Books** |
| Learners in household of<£16,190k **(Tier A)** | £810 | Up to 100% of travel costs for Residents outside of a 1.5 mile radius | Up to 100% of childcare costs for timetabled hours. Childcare capped at £2500 per child. | Up to 100% of costs dependant on curriculum requirements |
| Learners in household of <£24,000**(Tier B)** | £600 |
| Learners in household of <£30,000k **(Tier C)** | £510 |
| **Advanced Learning Loan Bursary** | **Bursary** | **Travel** | **Childcare** | **Uniform/Clothing/**  **Equipment/Books** | **Additional Learning Support – paid directly to college** |
| Household income of <£16,190k **(Tier A)** | £810 | Up to 100% of travel costs for Residents outside of a 1.5 mile radius | Up to 100% of childcare costs for timetabled hours. Childcare capped at £2500 per child. | Up to 100% of costs dependant on curriculum requirements | Up to a maximum of £150 |
| Household income of <£24,000k (**Tier B)** | £600 | Up to a maximum of £150 |
| Household income of <£30,000k **(Tier C)** | £510 | Up to a maximum of £150 |

* For each child aged 18 (or under) studying full-time, deduct £2000 per child from household income.
* Payments will be allocated on a pro-rata basis for part-time learners; traineeships
* Bursary funds will be subject to availability. 5% of the 16-18 and 19+ Bursary Funds are held for hardship.
* Students who would have progressed with Stourbridge College should apply to BMET for their travel costs