

HS29 – Bursary Policy

1. Introduction

1.1 Access Training receives funds from the Government for student financial support. These funds are there to help students overcome financial barriers that might prevent or make it difficult for them to participate, and to make sure that everybody can learn.

This financial support comes in three main streams – Vulnerable, Discretionary and Free Meal Entitlement (FME).

Any learner on an eligible course can apply for Learner financial support and the Access Training will assess an application based on the eligibility requirements set out in section 4 (below).

2. The Purpose of the Funds

2.1 The purpose of the 16-19 Discretionary Bursary Fund is to provide financial support towards some of the specific costs of participating in learning, without which it might be difficult for learners to take part in their 16-19 study programme and stay in learning.

Access Training is expected to use the funds to support learners who are struggling financially or where they have particularly high costs and anticipates that the support is enough to enable them to be retained in learning.

2.2 The Discretionary Learner Support Fund is available to help learners aged 19 or older who need support towards some of the specific costs of remaining in learning, without which it might make it difficult for them to take part in their learning programme and be retained in learning.

Support is available to adults on eligible learning programmes who meet the eligibility criteria; however, all support is subject to funds being available and it is not therefore an entitlement.

2.3 The Advanced Learner Loan Bursary (ALLB) is there to support students, who meet eligibility criteria that have been taken out an Advanced Learner Loan (ALL) to pay for their course fees.

3. Considerations

3.1 Access Training will:

- Develop clear criteria so learners can see how Access Training will administer and distribute these funds
- Assess each learner's financial situation by asking them to provide evidence of a learner's household income
- Identify what specific support needs learners might have that may prevent them from attending, being retained or taking part fully in learning activity before an award is made
- Support learners from the appropriate fund by way of for example, a bus pass, direct payment to a childcare provider or a regular payment for other expenses than living costs. This support should therefore not affect the level of benefits which a learner might be entitled to, although learners should let Department for Work and Pensions (DWP) know about any payments they receive
- Let learners know the outcome of any application and assessment and confirm any support
- Support learners with Free Meals if aged 16 to 18 (some 19+ learners may qualify if very specific Government criteria are met) and where household income is made up of certain income based benefits; where household income is less than £16,1901 and the household receives only Child Tax Credits (if a student only receives Working Tax Credit they will not be eligible); or where the household gets Universal Credit (applied after 1st April 2018) with a household income of less than £7,400 a year (after tax and not including any benefits the student receives). The value of the meal will be at least £2.41 as set by the Government.

HS29 – Bursary Policy

4. Eligibility

4.1 The residency eligibility criteria for the funds are aligned to the residency criteria addressed in the Eligibility Guidance, part of the overall Education Funding Agency (EFA) 16–19 /Adult Education Budget Funding Guidance 2023-24. These documents can be downloaded from the gov.uk website using the links below. And are updated periodically:

<https://www.gov.uk/government/publications/16-to-19-bursary-fund-guide-2023-to-2024-academic-year>

<https://www.gov.uk/government/publications/adult-education-budget-aeb-funding-rules-2023-to-2024>

4.2 Residency criteria are broadly determined by the following statements:

- You are a citizen of the United Kingdom and Islands, have Right of Abode (the right to live permanently in the United Kingdom without any immigration restrictions).
- You are an EEA (European Economic Area) national in the UK (United Kingdom) and have obtained either a pre-settled or settled status under the EU (European Union) settlement scheme and have lived continuously in the European Economic Area (EEA) including those with bilateral agreements such as Switzerland.
- You are a non-UK national, who has permission granted by the UK government to live in the UK and this permission is not for educational purposes only or you have obtained pre-settled or settled status under the EU settlement scheme and you have lived in the UK for the previous three years on the first day of learning.
- You, or a relevant family member, have obtained pre-settled or settled status under the EU settlement scheme and have been ordinarily resident in the UK or the EEA for at least the previous three years on the first day of learning.
- A non-EEA citizen is eligible for funding if they have permission granted by the UK government to live in the UK, which is not for educational purposes, and have been ordinarily resident in the UK for at least the previous three years before the start of learning.

4.3 Further information on eligibility can be obtained from the UK Council for International Student Affairs.

4.4 Accompanied asylum seekers aged 16-19 are eligible to apply for support from the 16–18 Bursary Fund and receive payments in kind, not including cash awards. Unaccompanied asylum seeker children are the responsibility of the local authority. They are treated as looked after children and are eligible for a bursary for vulnerable groups (in care).

4.5 Asylum seekers aged 19+ years are eligible to apply for dLSF:

- If they have lived in the UK for six months or longer while their claim is being considered by the Home Office, and no decision on their claim has been made;
- They are in the care of the local authority and are receiving local authority support under section 23C or section 23CA of the Children Act 1989 or section 21 of the National Assistance Act 1948;
- They have been refused asylum and have appealed against a decision made by the UK Government against granting refugee status and no decision has been made within six months of lodging the appeal; or,
- They have been granted support for themselves under section 4 of the Immigration and Asylum Act 1999.

HS29 – Bursary Policy

4.6 Access Training can only support adult asylum seekers with a travel pass or by paying for books or equipment on their behalf. Under no circumstances are direct payments to learners allowed as directed by the Government.

4.7 Support can only be considered for any learner, regardless of their priority group, if they are enrolled onto an appropriately funded course.

4.8 Access Training will consider any other sources of funding that learners might be in receipt of when assessing support needs (e.g. the mobility component of Disability Living Allowance, Personal Independence Payment or childcare support from Tax Credits).

4.9 Learners must be aged 20 or over to receive support from dLSF funding for childcare.

4.10 Learners will only be supported by the Advanced Learner Loan Bursary if they have an Advanced Learner Loan approved by the Student Loan Company (studying a level 3, 4, 5 and 6 programme).

4.11 Learners aged 19 or over on 31st August 2023 may be eligible to apply for continual support from the discretionary bursary fund if:

- They are continuing a programme of study they began when they were aged 16 to 18; or,
- They have an Education Health and Care Plan (EHCP) in place.

4.12 Access Training is unable to support 19+ students who live within a devolved authority of the UK. A list of the devolved areas can be found using the link below:

<https://www.gov.uk/government/publications/adult-education-budget-aeb-postcode-files>

5. Assessment Criteria

5.1 Support is based on an income assessment and a learner's household income must not exceed the maximum allowed amount.

5.2 Learners will be required to provide parent / carer / partner / own income evidence in the form of one (or more) of the following dependent on the strength of the evidence:

- Tax Credit Award Notice for the current year (2023-24) showing the income for 2022-23.
- Benefit evidence (dated no more than six months prior to the application date if applying in July or August or three months if applying in September onwards).
- Pay slips (two months or eight weeks consecutive).
- An official letter from an employer stating NET salary on company letter headed paper.
- Other relevant income evidence.
- If circumstances change mid-year, an application can be reassessed on production of up-to-date income evidence.

5.3 Learners applying for childcare support will need to show evidence proving guardianship such as a Child Benefit letter showing the learner's and the child(ren)'s name and address, or the Tax Credit Award Notice.

HS29 – Bursary Policy

5.4 Learners aged 16–19 who fall into one of the Vulnerable Student Bursary groups will need to show appropriate evidence such as:

- A letter setting out the benefit to which the student is entitled e.g. Income Support, Universal Credit, Employment and Support Allowance and Disability Living Allowance or Personal Independence Payment. For students in receipt of Universal Credit, students must also provide a document such as a tenancy agreement in the student's name, a Child Benefit receipt, children's birth certificates or utility bills.
- Written confirmation of a student's current or previous looked after status from the Local Authority which looks after them or provides their leaving care services.

5.5 If the learner is not entitled to Free Meals as they are in care / leaving care, they can choose to have meal voucher costs taken away from their bursary award.

5.6 Any trip costs planned by the curriculum that will add value to the college experience will be deducted from any remaining payments should they attend the trip.

5.7 Learners aged 19 (age as of the 31st of August 2023) or over and living with parents / carers, may be assessed independently if they are working and receiving a wage. This wage must be a minimum of £5,000 NET (£96 per week) income per annum. If they do not earn this amount, they will be assessed on their parents' / carer's income. If learners are living with parents and are in receipt of benefits such as Job Seekers Allowance (JSA), we will still consider them to be independent.

5.8 For learners aged 19 and over, studying on a level 3, 4, 5 or 6 FE programme, the Access Training will check that an Advanced Learner Loan to cover course fees has been approved and used before any assessment for financial support is carried out, in addition to the normal income and residency evidence required.

5.9 Access Training will not include Disability Living Allowance / PIP when assessing income of disabled students (the mobility component however, will be considered where an application for travel support is requested).

5.10 If learners are applying as financially independent but have dependants, an additional £1,000 per dependant can be added to the income threshold. If they are dependent upon parents / carers, £1,000 extra per additional dependant can be added to the income threshold. At Access Training discretion this will be capped at a maximum of £3,000 however, if the learner is assessed as independent but living with parents / carers there will be no allowance made for additional siblings living in the parental home.

5.11 Learners may be eligible for funding from an external source e.g. funding through the Job Centre; Access Training expects learners to access the external fund before any support will be considered. Funding which is provided by an external source e.g. DWP, mobility component of DLA, will be taken into consideration when making any financial award for travel.

5.12 If the learner receives the Higher Mobility component of Disability Living Allowance or Personal Independence Payment (of at least £62.55) no extra travel support will be awarded. This benefit is to support daily travel costs however, where a learner has a restricted concessionary travel pass, Access Training may offer additional support to cover this shortfall.

HS29 – Bursary Policy

5.13 All awards will be made on the basis that learners should be aiming to achieve an acceptable level of attendance each term, which will ensure success on the programme of study and that they comply with the Code of Conduct. Payments and support will be stopped if learners are exited from their programme. If learners do not achieve an acceptable level of attendance, they will require an intervention with their Tutor or Programme Manager / IQA. At this meeting, intervention strategies for improving attendance will be discussed. Short term goals will be set to improve attendance levels. Learners will receive support to meet these goals with the aim of remaining in learning.

5.14 All awards are made subject to the availability of funds allocated at the start of the academic year by the funding agencies / Government. Awards will be made on a first come first served basis and there is no guarantee that late applications will be funded. Learners should aim to submit their application with full supporting evidence as close to their enrolment date as possible; applications will be assessed in date received order. There are therefore no guarantees that awards will continue to be made due to budget restrictions. Prior to commencing a course with Access Training, consideration should be given to whether learners can continue to study if the funding is limited / capped.

5.15 Should the funding guidance change mid-year, this Policy may need to be amended to reflect these changes. This may affect the support that provided.

5.16 Appeals will be assessed by Access Training staff, to include the Claims and Compliance Manager and Quality Manager. The Operations Director may also sit on the panel. The aim is to complete 90% of appeals within 10 working days of receipt, when received by Access Training with all evidence. Appeals will be automatically rejected if learners do not provide adequate evidence to support the appeal. The appeal staff's decision is final, and no further appeal will be accepted without additional evidence. Previous successful appeals do not guarantee continued support in subsequent years.

5.17 Any learners living less than 1.5 miles away and appealing for travel support on ill health must have proof that they have approached the benefit agency in the first instance and are claiming any relevant Disability Benefits through them. Travel appeals will then only be approved where the learner has the Lower Mobility component (£23.70)

5.18 Letters from GP surgeries without any supporting evidence from consultants or confirmation of hospital treatment will not be accepted.

5.19 Any short-term mobility impairments will be looked at on an individual basis with the appropriate supporting documentation.

5.20 Access Training reserves the right to request the return of any equipment or travel pass provided, should the learner leave before the end of their programme or if it remains the property of Access Training such as a laptop. If a learner does not return the item to Access Training within a reasonable period, then they may be invoiced for the associated costs. If a learner has been allocated a loan laptop, they will be required to return it when they complete or withdraw from the course. If the laptop is not returned it may affect their ability to receive support in future years. The learner's details may also be passed onto a debt collector to retrieve the costs of replacing the laptop.

HS29 – Bursary Policy

6. Eligibility and Payment of Vulnerable Bursary

6.1 Vulnerable bursary can be paid to a young person who is aged under 19 on 31st August of the current contract year who is –

- And 16 – 18 and in care or a care leaver
- Disabled student in receipt of both Disability Living Allowance/Universal Credit and Disability Living Allowance/Personal Independence Payments in their own right
- In receipt of Income Support or Universal Credit

And has provided a fully completed Bursary/Free Meals Application form, alongside approved evidence of the above. Examples of acceptable evidence include a letter from the young persons key/social worker confirming care status, or a benefits award notice.

6.2 Once a fully completed form and relevant supporting evidence has been submitted to the Claims and Compliance team, the young person will be asked to participate in a meeting where their financial need will be discussed. From here, there are two possible outcomes –

- The learner is identified as having ‘no financial need’ and will not be awarded Vulnerable bursary. A letter will be sent to the home address confirming the reason behind this. If it is felt that an incorrect decision has been reached, an appeal can be made.
- The learner is deemed to have financial need and is awarded Vulnerable bursary. An agreement is signed by both the young person and a member of the Claims and Compliance team, outlining what is expected from both parties. An award letter and a copy of the agreement is sent to the home address. The learner is then paid via BACS every Friday afternoon during term time.
- A nominated member of the Claims and Compliance team will assess the form and apply to the Student Bursary Support Service (SBSS) for funds to cover the length of their course. A full time Study Programme can produce a full claim of £1,200 if the support assessment shows this to be appropriate. In many cases the claim may be a lesser amount. Any shorter course (such as a Traineeship or Study Programme starting later than September) will require to be prorated to the amount of £30 per week multiplied by number of weeks on programme. Where possible, funds will be recycled.
- Once authorisation has been gained from the SBSS, the bursary application form will be signed and stored by the Claims and Compliance team. PICS will be updated to reflect the learners Vulnerable Bursary status. A Bursary Agreement form will then be given to the learner which outlines how payments are made, the regularity and the conditionality of attendance.
- Learners who are in receipt of Vulnerable Bursary are not eligible for any other cash payments but can be supported by the Discretionary bursary through use of the kitchen and its supplies and assistance with the payment of any excursions necessary to the course (where it is felt they may be disadvantaged otherwise).
- It is the responsibility of the learner to inform the nominated Claims and Compliance Team member if they have a change of circumstance that may affect the continued eligibility for bursary payments.
- The nominated Claims and Compliance team member uses registers to collate payments on a Friday and informs the Finance Officer of what payments to make before 2:00PM that day. In the event they are not working on this day, a nominated person is identified. The payments are then recorded accurately and in a timely manner on the Bursary Tracker.

7. Travel Costs

HS29 – Bursary Policy

7.1 Travel costs will only be considered if the learner lives over 1.5 miles from the Access Training centre at which they are required to attend. There may be some exceptions where support can be considered even though the learner lives closer than 1.5 miles e.g. the learner student has a medical condition that makes walking difficult (evidence would be required as per appeal requirements) or the learner is a carer and needs to be able to get home quickly. (This list is not exhaustive).

7.2 Learners who have a Concessionary Travel Pass (covering all hours) will not normally be eligible for transport costs. Consideration may be given for example, where the learner cannot use their Concessionary Pass before 9.30am, which would prevent them from attending a morning class.

7.3 The most cost-effective transport should be accessed by the learner and in most cases the support provided will take the form of a reimbursement for purchased tickets from one of the transport operators in the local area.

7.4 Payments for travel outside of travel pass routes will be made on a regular basis via Bank Automated Credit System (BACS) directly into the learner's bank account or direct cash payments. This payment may clear at varying dates which is out of the control of Access Training. The learner must therefore be able to cover their travel costs until payment clears. Access Training reserves the right to award travel support in other forms, for example pre-paid travel tickets.

7.5 Access Training may consider funding travel costs under exceptional / emergency circumstances. Household income evidence should be sought but a discretionary award can be made in an emergency where this is not possible, for example homelessness. A referral through a tutor would be required. Emergency referrals should be made to the Full Time Programmes Manager.

8. Additional Equipment including Health, Safety and ICT

8.1 Learners who require additional equipment to support their learning, should be notified at the application stage of the recruitment process.

8.2 Access Training aims to provide all learners with the equipment required to learn effectively, but in some circumstances may have to charge for additional equipment, where support funding is not available. If charged the equipment would usually be retained by the learner on completion of learning.

8.3 Where a charge is needed, in most cases the payment will be made to an external recommended supplier which has been sourced for best quality and price.

8.4 The learner would also be offered the opportunity to borrow any clothing or equipment free of charge if it is required to comply with health and safety regulations.

(Also mentioned in 5.20 above)

9. Eligibility and Payment of Free Meal Entitlement (FME)

9.1 Where a learner is eligible for Discretionary bursary, they may also be entitled to claim FME. This is paid in the form of Greggs Vouchers, which are provided for every full day attended at both centre and placement.

9.2 The learner will also need to provide a fully completed Bursary / Free Meals Application Form, alongside approved evidence.

HS29 – Bursary Policy

9.3 In order to be eligible for FME, the household of the learner must –

- Have a NET income of less than £16,190 per year AND have their family in receipt of Child Tax Credits
or
- The learner is in receipt of Universal Credit and has a household income of less than £7400 per year.

9.4 Once eligibility has been confirmed by the nominated member of the Claims and Compliance team, the bursary application form will be signed by the Claims and Compliance Manager and stored securely. PICS will be updated to reflect the learners FME status. A Bursary Agreement form will then be given to the learner which outlines how payments are made, the regularity and the conditionality of attendance.

9.5 It is the responsibility of the learner to inform the nominated Claims and Compliance team member if they have a change of circumstance that may affect the continued eligibility for bursary payments.

10. Additional Information

10.1 A Bursary Agreement form will be given to the learner which outlines how payments are made, the regularity and the conditionality of attendance including behaviour. A letter confirming that the bursary has been awarded is then sent to the home address. The learner will be expected to hand in any receipts (where required) on a weekly basis to a member of the Claims and Compliance team for reimbursement.

10.2 Any payments made will be recorded accurately and in a timely manner on the internal Bursary Tracker.

10.3 We are also able to assist in nursery costs where the student in question is a parent through the government's Care to Learn scheme. More information about this is available at <https://www.gov.uk/care-to-learn>

10.4 It is the responsibility of the learner / guardian to make Access Training aware in any changes to circumstance that may affect their entitlement to any form of bursary. They are able to report any changes directly by asking to speak to a member of the Claims and Compliance team whilst in centre, or by calling 0115 958 7257.

Main Aims:

- **To ensure all eligible learners receive the financial support they are entitled to, to enable them to continue in education.**
- **Ensure detailed records are kept of all payments made for audit purposes.**

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Associated Policies / Guidance	
https://www.gov.uk/government/publications/16-to-19-bursary-fund-guide-2023-to-2024-academic-year	
https://www.gov.uk/government/publications/adult-education-budget-aeb-funding-rules-2023-to-2024	
Associated Forms	
HSF25a – 16-19 Learner Support Assessment and Application Form	
HSF25b – AEB Learner Support Assessment and Application Form	
HSF26 – Bursary Agreement	