



# **Learner Support Procedures and Guidelines 2022-23**

16-19 Vulnerable Bursary

16-19 Discretionary Bursary

19+ Discretionary Learner Support

19+ Advanced Learner Loan Bursary

Further Education Free Meals

Care to Learn

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## 1 Introduction

Finance is an important consideration when coming to College. To ensure that finance is not a barrier to enrolment and attendance, the College will publish a statement and promote these funds and any other sources of financial assistance at its Open Events, Welcome Days and on the website. Students will have the opportunity to discuss individual circumstances at interview or enrolment to ensure that the student can consider these funds when making choices about post 16 education.

The College will work with the local authorities, youth groups and schools to find ways to raise awareness of the bursary and ensure that young people are aware of the financial help available at Halesowen College.

Grants and loans from these funds are only eligible to students enrolled on an agency funded course who are in financial need. Repayment may be required from students whose attendance or effort is unsatisfactory or who fail to complete the course.

## 2 16-19 Bursary Fund

### 2.1 Background

The government via the Funding Agency has allocated funds for Colleges to distribute to students who require financial support in overcoming specific barriers to participation so that they can remain in education or training. This is called the 16-19 Bursary Fund. This fund is available to students aged 16-18 as at 31 August. Students aged 19+ are only eligible if they are continuing on a study programme they started aged 16-19 or have an Education Health and Care Plan (EHCP).

The fund is made up of two parts:

- Vulnerable bursary of up to £1,200 per year to the most vulnerable young people;
- Discretionary bursary to meet individual needs of those who cannot stay in education without financial help, for example for meals, uniform and equipment.

The College adheres to the Funding Agency guidelines regarding eligibility for and distribution of the fund. The College has an allocation for the discretionary element. All vulnerable bursary funding is held centrally and the College claims for this on a case by case basis.

The College will make clear to all learners in receipt of support that it is their responsibility to contact the Department for Work and Pensions (DWP) if necessary, as support may affect eligibility for some benefits.

### 2.2 Allocation and Priorities

The funds are to provide support for learners aged 16-19 who need financial support to meet the costs associated with learning and attending College.

To be eligible for either type of bursary the student must meet the age and residency criteria and be participating in provision that is subject to Ofsted inspection and is funded by the Funding Agency.

The College is responsible for identifying students defined in the relevant groups and will proactively link with the Local Authority, local care teams and local agencies working with vulnerable students, to help and encourage students to apply for a vulnerable bursary. The College acknowledges that students may be reticent to apply for fear of being stigmatised. The College will inform bursary students how their information will be used and shared to build trust.

Types of support available may include:

- Course related costs not included in the course fee (e.g. contributions to trips. Equipment and uniform)
- Transport (including free travel on college coaches)
- Exams, professional membership fees and registration fees
- Meals
- Digital Grant
- UCAS Fees
- Funds for travel to visit a university or to a job interview

The College will prioritise vulnerable groups such as:

- Parents who need help with childcare
- Young carers
- Learners who are economically or socially disadvantaged and are facing financial difficulty
- Learners who are disabled, physically or mentally and/or have learning difficulties
- Ex-military personnel

The College aims to distribute all available resources to students on a needs basis and this policy is designed to ensure that funding reaches those most in need and will not pay weekly attendance allowances or achievement/attendance bonuses. The fund may provide financial support by giving items, services or cash direct to the learner. This may be in the form of a grant or repayable loan.

The College will base all decisions about which students receive help from the bursary and how much bursary they receive on each student's individual circumstances and their actual financial need. Evidence will be held to demonstrate how the level of support was determined

No student should automatically be awarded a set amount of funding without an assessment of the level of actual financial need they have. Flat rate/fixed rate payments should not be made to students without considering students actual financial needs.

The bursary fund will not be used to support costs not related to education (e.g. living costs, extra-curricular activities or to provide learning support).

The Funding Agency has a website check if students were in of pupil premium funding in year 11 or received SEND support. They have made this available so that providers can proactively target students to see if they need support rather than relying general promotion of the bursary. The website is <https://www.keytosuccess.education.gov.uk>.

Appendix A sets out the College's processes and methodology for allocation and prioritisation for the 16-19 Discretionary Bursary fund.

### 2.3 Administration Procedures

The College will use 5% of the allocation to contribute to administrative costs.

The College will submit in-year management information and a final claim to the funding agency as required.

The vulnerable bursary allowance is held centrally by the Student Bursary Support Service (SBSS). The College will draw down this funding on demand by completing a funding claim via the online portal. Records must be kept to evidence the claim and payment to the student.

The College must ensure they have fully verified the student's eligibility and assessed their participation needs before submitting any funding claim. The claim can be for up to £1,200 again based on student need

Claims can be submitted at any time during the academic year, but the closing date for claims is 31 July. Claims submitted after this date will not be paid. The Funding Agency suggests making regular claims throughout the year. The College will retain a copy of the funding claims submitted and records of funding paid through the claims process. The funding agency advises that the portal is not a filing system for claims and as such the College should ensure we keep our own records outside the portal for future audit.

The College is expected recycle vulnerable bursary claims that have been paid if they are no longer required. For example, if a student leaves and a new student applies then the College should only claim for the difference. If funds were claimed in error and cannot be recycled they should be returned by contacting the Student Bursary Service. If recycled funds are being used a zero claim should be made for all eligible students.

The Student Bursary Support Service website is <https://studentbursary.education.gov.uk/w/webpage/1619bursary> and the institution ID is EIO159. The Student Hub Manager is responsible for submitting the claims. Other staff have access to the portal for contingency purposes.

The College will receive the discretionary bursary allocation in 2 parts. Approximately two-thirds will be paid in August and one third in April.

Unspent Discretionary Bursary funds maybe carried over to the next academic year. The College must fully utilise any unspent funds for either free meals or discretionary bursary before using the new academic year allocation. Funding cannot be carried forward for more than one academic year. The College must report unspent funding using the Funding Agency online enquiry form by 31st March each year to allow those funds to be recovered.

Data fields in the ILR must be populated, as failure to do so may jeopardise future allocations, and is mandatory.

16 to 19 Bursary Funds are subject to normal assurance arrangements for 16 to 19 education and training. College processes will ensure that there are records of bursary applications and expenditure at student level (including a breakdown of the value, purpose, whether awarded or not, and a brief justification for the decision). Records must be able to demonstrate a students eligibility, financial need, receipts (as required) and support of evidence in kind.

The online portal Pay My Student (PMS) shall be used to process all applications and store appropriate evidence. The application process will ensure the PMS application covers all elements of the Funding Agency application checklist.

[https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/1063803/16-19\\_Bursary\\_Checklist\\_1\\_.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1063803/16-19_Bursary_Checklist_1_.pdf)

## 2.4 16-19 Bursary Application

Students must complete an application giving personal information, financial circumstances and bank details. This can be completed prior to enrolment. However, no award will be made until the student has enrolled and provided evidence of income/benefits to support their application. The student/their parents must also sign to say that information provided is complete and factual. The College must make the student aware of the terms and conditions of the fund and retain evidence that they have read and understood them.

Students should apply for support from the fund as soon as possible and usually in advance of the start of teaching. Awards will be made against the criteria and once all funds are committed no further applications can be considered.

Incomplete applications and applications with no evidence of income attached cannot be processed. Students will be followed up and encouraged to complete the application in a timely manner.

## 2.5 Vulnerable Bursary Overview and Eligibility

The 16-19 Vulnerable Bursary Fund is a bursary of up to £1,200<sup>1</sup> per year to the following students:

- In care
- Care leavers
- In receipt of Income Support or Universal Credit because they are financially supporting themselves and/or a dependant.
- Students in receipt of Disability Living Allowance (DLA) or Personal Independence Payments (PIP) in their own right as well as Employment and Support Allowance or Universal Credit in their own right.
- Universal Credit has been fully rolled out and so young people aged 16 to 18 will no longer be in receipt of the other benefits. However, students 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 those other legacy benefits.

Appropriate evidence includes:

- Income Support or Universal Credit award notice plus additional evidence to confirm independence e.g. tenancy agreement
- Written confirmation of the student's current or previous looked after statement issued by the Local Authority (email is acceptable).
- DLA/PIP Letter and UC/ESA Letter.

No other evidence is acceptable and the College will only submit a claim once evidence has been verified.

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<sup>1</sup> Pro rata for courses less than 30 weeks per year. Low weekly study hours may also require a pro-rata amount.

The College must obtain proof that the student is eligible and retain copies of documents for audit purposes. The General Data Protection Regulation Principles (GDPR) must be adhered to in recording, processing and retaining data.

Students aged 19 or over are not eligible for bursaries for vulnerable groups.

The College may pay a vulnerable student more than £1,200 if they are assessed as requiring additional help to remain in education. This would be paid from the discretionary bursary allocation.

The bursary will be paid from the date that the College became aware of their eligibility/application. The College may use its discretion to back date payments depending on their financial circumstance. Payments will cease immediately should a student withdraw.

Receipt of the bursary may affect entitlement to DWP income related benefits. Although means tested benefits should be unaffected if a student is themselves in receipt of benefit, certain household/family benefits may be impacted.

Payments are made weekly to the learner by BACS (up to £40 per week over 30 weeks). This is to help students manage their finances.

## **2.6 Discretionary Bursary Overview**

The College makes discretionary bursaries to young people in ways that best fit the needs and circumstances of the learner. Bursaries are targeted towards those who face financial barriers to participation. In setting the criteria for the Discretionary Bursary the College complies with the requirements of the Equality Act 2010.

Discretionary bursaries are designed to be sufficient to help students meet the costs related to participation but are subject to funding being available. Once the allocation is fully committed, no further awards can be made. A small emergency fund will be ring-fenced to support students who face exceptional circumstances such as homelessness. Information will be provided to students regarding other forms of financial support as appropriate.

Payments to students, if not in kind, will be made by BACs to the student's own bank account.

Funds for all beneficiaries will be allocated to ensure payments can be processed promptly throughout the year.

The College aims to distribute all available resources to students on a needs basis. Those most in need, such as those in care, care leavers or those claiming defined benefits in their own right will be prioritised.

## **2.7 Eligibility for 16-19 Discretionary Bursary**

The household income thresholds for support are as follows:

- Band 1 Up to £26,910 and/or in receipt of income-based benefits
- Band 2 £26,911 - £32,890
- Band 3 £30,891 - £39,865
- Band 4 £39,865- £42,495



These thresholds are updated annually in accordance with any increase/decrease in the national living wage.

Students assessed as being in Band 1 will be eligible to claim up to 100% of the maximum award subject to resource availability and need. Band 2 – 60%, Band 3 – 30%, and Band 4 – 20%.

Examples of acceptable evidence to support eligibility includes:

- P60 or Payslips showing Employment
- All pages of an up to date letter showing a benefit or income
- The 3 most recent Universal Credit Award Statements
- All pages of the current Tax Credits Award
- Bank statements showing 3 consecutive payments of a benefit or income.

Benefits designed to help with the extra costs caused by a disability will not be included in any assessment of income. These include:

- Disability Living Allowance (DLA)
- Access to Work
- Attendance Allowance
- Personal Independence Payment (PIP)

The above evidence shall be retained for audit purposes as per the funding rules.

Where there is evidence of income based benefits then the student will automatically be allocated to Band 1. These include Working Tax Credit and Housing Benefit.

Students who are in receipt of a FEM eligible benefit will also be automatically allocated to Band 1.

Where the household has more than two dependants, the application (should it be approved as band 2 or 3) will be moved to the next band i.e. a band 3 assessment would be moved to band 2 and a band 2 to band 1 with band 1 being the highest level of support.

For students under 19, P60/salary/income based benefits evidence relates to parents/legal guardians where the student is living at home and not independently. Students living independently of parents will be treated as independent adults and evidence of parental income will not be required.

Subject to funding being available, students with a household income in excess of £42,495 may, in exceptional circumstances, be eligible for support subject to the recommendation of their Student Support Manager and approved by the Director of Learner Services.

All awards made are subject to satisfactory attendance<sup>2</sup>, progress, and behaviour<sup>3</sup>. Level of attendance and conduct are checked before any payment (or follow on payment) is made and allocation of funds may be withheld should satisfactory levels not be achieved. On the recommendation of a personal coach, a Student Support Manager may approve the payment of an award where attendance is below the 90% minimum standard i.e. where financial support would aid attendance and/or where there are extenuating circumstances. These standards are clear and should be communicated to all students.

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<sup>2</sup> The College target is 100%. Students attending less than 90% may have payments withheld unless their Student Support Manager authorises payment.

<sup>3</sup> Students with a Level 3+ disciplinary sanction may have payments withheld unless their Student Support Manager authorises payment.

All awards are based on financial need and evidence of household income will be required to support all claims. The College will retain evidence that the student is eligible for a bursary and has agreed to the terms and conditions.

Learners who are eligible for support are not automatically entitled to the maximum allocation.

Students may have received an award in previous years; this is no guarantee of future awards. Students must make an application each academic year.

The following students are not eligible for this support:

- Apprentices
- Higher Education students
- Students under 16 attending College as part of Key Stage 4
- Students 19+ (on 31 August 2019 except those funded as 19+ continuers and/or those with an EHCP).
- Privately fostered children (excluded from vulnerable bursary only)
- Young offenders serving a custodial sentence, on temporary licence or remanded to a secure institution

Distance learning students are not automatically excluded but are not expected to require help towards the costs of transport, equipment and uniform.

Previous eligibility in school for free meals does not automatically entitle the learner to a bursary. However, free meals are available and students may apply for support as part of the bursary application. Students in receipt of free meals may also be eligible for support from the 16-19 Bursary Fund.

It is the responsibility of the College to determine eligibility. Students must meet the residency criteria in Funding Agency funding regulations for post 16 provision. Students who are with an adult relative/partner and seeking asylum but have not had their application for asylum refused, are not entitled to public funds and may only receive in-kind support for books, equipment and/or a travel pass. Cash/cash equivalents cannot be provided. Unaccompanied asylum seeking children however are the responsibility of the Local Authority and are treated as a looked after child and hence eligible for a vulnerable bursary. Should asylum be refused and the appeals process exhausted then there is no further entitlement to public funds.

## **2.8 Emergency Payments**

Emergency payments are excluded from the income threshold eligibility assessment. Funds for all beneficiaries will be allocated to ensure emergency payments can be processed promptly throughout the year. Such emergency payments are designed to address the immediate needs of a student who may find themselves homeless or in severe financial hardship in order that they can continue with their learning. Emergency payments must not take the form of regular payments for living costs but may be made to cover initial costs to ensure students remain in learning when they have a domestic emergency including homelessness. The fund is not a replacement for welfare benefits and must be authorised by College Leadership Team or Safeguarding Inclusion Manager.

## **2.9 The Financial Framework**

The maximum discretionary bursary is £1,500 per full time student (pro rata for part time and as per the income bands). All discretionary awards are subject to resource availability. This £1,500 is not

an automatic entitlement but a ceiling for awards – all of which are dependent on affordability. The £1,500 limit can be increased in exceptional circumstances by the Student Finance Committee.

Funds are given to support the costs of attending College and associated study. It is not an income based welfare benefit to contribute to overall household income. Any awards may be repayable if the student fails to complete the course, their attendance is at an unacceptable level or effort is considered to be below a satisfactory level. If the student fails to meet these conditions they must be aware that they may be asked to repay funds and invoiced accordingly.

Any loans issued to learners from the fund should be repaid in full by 31 July of the current academic year. No loan issued via the fund will be subject to interest.

Support will be granted to students in line with the broad categories in the table listed in Categories of Financial Support (section 7).

Students in receipt of a vulnerable bursary will also be eligible for discretionary awards.

### 3 Further Education Free Meals

#### 3.1 Background

The Funding Agreement places a legal duty on the College to provide free meals to disadvantaged students. Institutions must provide a free meal to eligible students for each day that they attend their study programme, where this is appropriate.

Free meals are available for eligible students enrolled in further education and aged 16, 17 or 18 on 31 August of the current academic year. Students aged 19 or over are only eligible to receive a free meal if they are continuing on a study programme they began aged 16 to 18 or have an Education, Health and Care Plan (EHCP). The College will ensure that all eligible students are provided with a meal in line with government directives.

Institutions receive funding at a rate equivalent to £2.41 per student per meal. The funding for the free meals and 16 to 19 Discretionary Bursary Fund may be treated as a single allocation. The Funding Agency allows the College to use its discretion to manage the single allocation as appropriate to best provide support to eligible students for both schemes. Free meals in further education remains an entitlement and the College must manage the single allocation appropriately to ensure that all students entitled to a free meal are provided with one.

#### 3.2 Eligibility

Free meals are targeted at financially disadvantaged students. Students must be aged 16 to 18 on 31<sup>st</sup> August. Students aged 19 or over are only eligible if they are continuing on a study programme they began aged 16 to 18 or have an EHCP. To qualify students must submit an application to the College (this is actioned as part of the 16-19 Bursary application) and be in receipt of one or more of the benefits defined below:

- Income Support
- Income Based Job Seekers Allowance (JSA)
- Income related Employment and Support Allowance (ESA)

- Support under part VI of the Immigration and Asylum Act 1999
- Guarantee element of State Pension Credit
- Child Tax Credit when the recipient is not entitled to Working Tax Credit and has an annual gross income of less than £16,190
- Working Tax Credit run on
- Universal Credit with net earnings not exceeding the equivalent of £7,400 per annum (after tax and not including any benefits)

The College must see evidence of these benefits and retain a copy for audit purposes whilst also ensuring compliance with the General Data Protection Regulations (GDPR).

Working Tax Credit alone is not a qualifying benefit. However, if a learner or their parent(s)/guardians are in receipt of a qualifying benefit and Working Tax Credit they are eligible for free FE meals.

Students must also meet the residency criteria as specified in the Funding Agency funding regulations.

The following groups of students are ineligible for free meals in FE:

- Students aged under 16
- Students aged 19+ unless they have an Education, Health and Care Plan (EHCP) or are a continuer
- Apprentices.

### 3.3 Transitional Protection Arrangements

The DfE has put transitional protection arrangements in place to provide certainty for families and ensure they do not experience a sudden loss of free meals. All students already receiving free meals at 1 April 2018 and onwards will continue to receive free meals whilst Universal Credit is rolled out until March 2023 and then until the end of the course. This will apply even if their household earnings rise above the new threshold during that time. This applies until Universal Credit is fully rolled out.

Institutions do not need to carry out any further eligibility checks for these protected families during this period.

The College may note on the students record that their free meals entitlement is 'protected'.

The College should seek to identify students who are eligible to receive free meals under the transitional protection. This information might be obtained by speaking to the student's previous school or their local authority or previous years applications. Where the College is unable to verify previous eligibility the student /parent may be asked to provide evidence.

Once universal credit is fully rolled out, any students receiving free meals who no longer meet the eligibility criteria at that point (because they are earning above the threshold) will continue to receive protection until they complete their 16 to 19 funded education. 19+ continuers and students aged 19 and over with EHCPs will continue to receive protection until the end of their current programme of study.

### 3.4 Allocation and Provision

The College will make available to each eligible student an allowance of £2.41 minimum for each day of their study programme including work placement.

The College will offer healthy options and hot food options within physical constraints. All reasonable steps will be made to accommodate special dietary needs, for example allergies/tolerances and cultural/faith requirements. When students are in College the meal allowance will be in the form of a cashless system. Where students are off-site the College may provide a cash allowance in the form of a BACS payment or other cashless alternative such as a supermarket gift card.

Students in receipt of FE free meals may also benefit from the 16-19 Bursary Fund. However, this source of funding will be a consideration in the assessment for a bursary. The College will ensure that enhancement of the meal allowance from £2.41 per day will not be detrimental to the other needs of the student. The Funding Agency allows the £2.41 allowance to be enhanced but this must be justified at audit. The enhanced allowance the College provides is based on the significant cost of living rises and price rises faced by our retail outlets sourcing quality food. Students do better in their studies when they have access to proper, regular, nutritional meals.

### 3.5 Administration

Receipt of free meals must be recorded in the ILR and this data will inform future allocations. The College will receive its free meals allocations in 2 parts. Approximately two-thirds will be paid in August and one third in April.

5% of the funding will be used to contribute to administrative costs.

Any underspend will be carried forward to the next academic year. We must fully utilise any unspent funds for either free meals or discretionary bursary before using the new academic year allocation. Funding cannot be carried forward for more than one academic year. The College must report unspent funding using the Funding Agency online enquiry form by 31<sup>st</sup> March each year to allow those funds to be recovered.

Free meals in further education is subject to normal assurance arrangements for 16 to 19 education and training.

The College will maintain accurate and up to date records that evidence which students receive free meals funding; confirm student eligibility for funding, transitional protections, and demonstrate appropriate use of funds, including the rationale for any enhancement to the £2.41 free meals rate. The College must complete the free meal field in the ILR to provide information on the number of young people eligible for free meals in further education using code FME2.

## 4 Care to Learn

### 4.1 Background, Applications and Eligibility

Care to Learn (C2L) provides funding for childcare to help young parents (defined as those aged under 20) continue in education after the birth of a child. The scheme provides funding for childcare whilst the young parent is engaged in a study programme and is not able to provide care for their child. It can also help the young parent with any additional travel costs involved in taking the child to the childcare provider.

The College is committed to the promotion of Care to Learn and provides web links to students under 20 years old who require childcare support.

Care to Learn can provide up to £160 per week to students studying full or part time at College who commence a course before their 20th birthday.

Young parents must complete and submit a new application each academic year even if their study programme runs for more than one year. Students should apply on the Student Bursary Support Service website: <https://studentbursary.education.gov.uk/w/webpage/student-bursary>

After the young parent has applied, they must give the College evidence that confirms receipt of Child Benefit for their child or a copy of their child's birth certificate.

Student Bursary Support Service (SBSS) will not assess the application until the College and the childcare provider complete their part of the application.

Childcare payments are made to the childcare provider and Travel Payments to the College who then must pass this onto the student or arrange their travel.

The SBSS will only make payments for childcare while the young parent is attending their study programme and the child is in childcare. The College must complete a monthly attendance monitoring return.

## 5 Free Childcare Support

### 5.1 Background

All 3 and 4 year olds and eligible 2 year olds can access 15 hours a week of government funded early education for 38 weeks of the year. Working parents of 3 and 4 year olds are entitled to 30 hours a week childcare for 38 weeks of the year. More information about childcare support is provided on childcare choices website <https://www.childcarechoices.gov.uk>.

The College is not involved in the administration or distribution of these funds.

## 6 Higher Education C

## 7 Childcare Grant

### 7.1 Background

Full time Higher Education students with children under 15 or under 17 if they have special educational needs may be eligible for a grant that does not have to be paid back to help with childcare costs. Grants are paid into a Childcare Service Payment Services which is then used to pay the childcare provider. Students can apply for this as part of their main student finance application.

The College is not involved in the administration or distribution of this grant.

## 8 19+ Discretionary Learner Support

### 8.1 Background

The College has an allocation of funds from the Funding Agency in respect of the adult skills budget. The College may allocate a proportion of this to support eligible students, on further education courses funded by the Agency who have a specific financial hardship that prevents them from taking part in learning. This is referred to as Discretionary Learner Support (DLS).

The College adheres to Funding Agency guidelines regarding eligibility for and distribution of the fund. The College is not allowed to move funds between Discretionary Learner Support 19+ (DLS) and the Advanced Learner Loans Bursary Fund (LBF). All awards are based on need and evidence/assessment of income/benefits will be required to support all claims.

DLS comprises:

- 19+ hardship fund (ESFA and WMCA)
- 20+ childcare

The College will make clear to all learners in receipt of support that it is their responsibility to contact the Department for Work and Pensions (DWP) if necessary, as support may affect eligibility for some benefits.

### 8.2 Allocation and Priorities

The funds are to provide support for learners aged 19+ in financial hardship and those aged 20+ with childcare needs. Learners in receipt of a 19+ Advanced Learning Loan must seek support via the LBF.

All awards are subject to funding being available. Once the DLS allocation is fully committed, no further awards can be made. Information will be provided to students regarding other forms of financial support as appropriate. The College will be mindful of other types of support e.g. travel costs provided by Job Centre Plus when making awards.

Types of support available may include:

- Course related costs not included in the course fee (e.g. contributions to trips. Equipment and uniform)
- Transport
- Exams, professional membership fees and registration fees
- Meals
- Childcare
- Digital Grant
- UCAS Fees
- Funds for travel to visit a university or to a job interview

The College will prioritise vulnerable groups such as:

- Parents who need help with childcare
- Learners who are economically or socially disadvantaged and are facing financial difficulty
- Learners who are disabled, physically or mentally and/or have learning difficulties
- Ex-military personnel

Learners who are financially disadvantaged, who are not eligible for such support from other government sources, are a key group. For example, those mandated to training by DWP would be expected to receive support from DWP funds in order to protect the discretionary pot. From August, all who have been 'mandated' to training (whether on a full or part-time basis) by Job Centre Plus have their travel and childcare costs met by Jobcentre Plus where required.

The College aims to distribute all available resources to students on a needs basis and this policy is designed to ensure that funding reaches those most in need and will not pay weekly attendance allowances or achievement/attendance bonuses. The fund may provide financial support by giving items, services or cash direct to the learner. This may be in the form of a grant or repayable loan.

The DLS will only be used to pay for childcare for learners aged 20 or older on the first day of learning who are at risk of not starting or continuing learning because of childcare costs. Childcare costs are only eligible if they are from a childminder or childcare provider registered with Ofsted. Informal childcare e.g. by a relative will not be funded. Learners aged under 20 must use the Care to Learn programme to fund their childcare costs. The DLS cannot be used to top up care to learn payments.

Appendix B sets out the College's processes and methodology for allocation and prioritisation for 19+ hardship and 20+ childcare.

### **8.3 Administration**

The College will claim 5% of its total learner support expenditure as administration expenditure.

The appropriate Learner Support Reason codes will be recorded in the ILR.

A mid-year funding forecast will be submitted in February, a year-end forecast submitted in June and a final claim made in October to the Funding Agency.

The online portal Pay My Student (PMS) shall be used to process all applications and store appropriate evidence.



## 8.4 DLS Application

Students must complete an application form giving personal information, financial circumstances and Bank Details. This can be completed prior to enrolment. However, no award will be made until the student has enrolled, eligibility checked and evidence of income/benefits to support their application provided.

Students should apply for support from the fund as soon as possible and usually in advance of the start of teaching. Awards will be made against the criteria and once all funds are committed no further applications can be considered.

Incomplete forms and forms with no evidence of income attached cannot be processed. Students will be followed up and encouraged to complete the application.

## 8.5 Eligibility for DLS

The household income thresholds for support are as follows:

- Band 1 Up to £26,910 and/or in receipt of income-based benefits
- Band 2 £26,911 - £32,890
- Band 3 £30,891 - £39,865
- Band 4 £39,865- £42,495

These thresholds are updated annually in accordance with any increase/decrease in the national living wage.

Students assessed as being in Band 1 will be eligible to claim up to 100% of the maximum award subject to resource availability and need. Band 2 – 60%, Band 3 – 30%, Band 4 – 20%.

Examples of acceptable evidence to support eligibility include:

- P60 or Payslips showing Employment
- All pages of an up to date letter showing a benefit or income
- The 3 most recent Universal Credit Award Statements
- All pages of the current Tax Credits Award
- Bank statements showing 3 consecutive payments of a benefit or income.

Benefits designed to help with the extra costs caused by a disability will not be included in any assessment of income. These include:

- Disability Living Allowance (DLA)
- Access to Work
- Attendance Allowance
- Personal Independence Payment (PIP)

Students 19+ living independently of parents will be treated as an independent adults and evidence of parental income will not be required.

Where there is evidence of income based benefits then the student will automatically be allocated to Band 1. These include Working Tax Credit and Housing Benefit.

The Eligibility criteria for FEM shall be used to automatically allocate students aged 19+ into Band 1 (note 19+ students are not eligible for FEM).

Where the household has more than two dependants, the application (should it be approved as band 2 or 3) will be moved to the next band i.e. a band 3 assessment would be moved to band 2 and a band 2 to band 1 with band 1 being the highest level of support.

Subject to funding being available, students with a household income in excess of £39,866 may, in exceptional circumstances, be eligible for support subject to the recommendation of their Student Support Manager and approved by the Director of Learner Services.

All awards made are subject to satisfactory attendance<sup>4</sup>, progress, and behaviour<sup>5</sup>. Level of attendance and conduct are checked before any payment (or follow on payment) is made and allocation of funds may be withheld should satisfactory levels not be achieved. On the recommendation of a personal coach/Student Support Manager may approve the payment of an award where attendance is below the 90% minimum standard i.e. where financial support would aid attendance and/or where there are extenuating circumstances. These standards are clear and communicated to all students.

All awards are based on financial need and evidence/assessment of household income/benefits will be required to support all claims. The College will retain evidence that the student is eligible for a bursary and has agreed to the terms and conditions.

Learners who are eligible for support are not automatically entitled to the maximum allocation.

Students may have received an award in previous years; this is no guarantee of future awards. Students must make an application each academic year.

To be eligible for DLS, students must be studying a course funded by the Funding Agency. The eligibility of students for funding is determined by Funding Rules. This will be checked before any awards are given.

The following students are not eligible for this support:

- Higher Education students (unless course funded by Funding Agency)
- Students aged under 19 for hardship and aged under 20 for childcare support and supported by 16-19 Bursary Fund.
- Students ineligible for Funding Agency funding
- Prisoners and those on temporary license for example day release
- Students funded by a 19+ learning loan
- Those who are receiving an income and have no financial need
- Learners who are already receiving financial assistance with travel or childcare costs from Job Centre Plus or a work programme provider in connection with pre-employment training.

Students seeking asylum may be eligible for support but may only receive support in the form of books, equipment or a travel pass. Support in the form of cash is prohibited.

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<sup>4</sup> The College target is 100%. Students attending less than 90% may have payments withheld unless their Senior Tutor authorises payment.

<sup>5</sup> Students with a Level 3+ disciplinary sanction may have payments withheld unless their Senior Tutor authorises payment.

The fund will not be used to pay weekly attendance allowances or achievement/attendance bonuses. However, conditions such as attendance may be attached to grant payments or repayable loans.

## **8.6 Emergency Payments**

Emergency payments are excluded from the income threshold eligibility assessment. Funds for all beneficiaries will be allocated to ensure emergency payments can be processed promptly throughout the year. Such emergency payments are designed to address the immediate needs of a student who may find themselves homeless or in severe financial hardship in order that they can continue with their learning. The fund is not a replacement for welfare benefits and must be authorised by College Leadership Team or Safeguarding Inclusion Manager.

## **8.7 The Financial Framework**

The maximum discretionary award (excluding childcare) is £1,500 per full time student (pro rata for part time and as per the income bands). This can be increased on the authority of the Student Finance Committee to ensure that students are fully supported. All discretionary awards are subject to resource availability. This £1,500 is not an automatic entitlement but a ceiling for awards – all of which are dependent on affordability.

Funds are given to support the costs of attending College and associated study. It is not an income-based welfare benefit to contribute to overall household income. Any awards may be repayable if the student fails to complete the course, their attendance is at an unacceptable level, they are in receipt of level 3+ disciplinary or effort is considered to be below a satisfactory level. If the student fails to meet these conditions, they must be aware that they may be asked to repay funds and invoiced accordingly.

Any loans issued to learners from the fund should be repaid in full by 31 July of the current academic year. No loan issued via the fund will be subject to interest.

Support will be granted to students in line with the broad categories in the table listed in Categories of Financial Support (section 7).

Payments to students, if not in kind, will be made by BACs to the student's own bank account. Cash payments cannot be made to any learner who is seeking asylum in the UK. Non-cash support may be given to eligible students in the form of course related books, equipment or a travel pass.

# **9 19+ Advanced Learner Loans Bursary Fund (LBF)**

## **9.1 Background**

The College has an allocation of funds from the Funding Agency called the Loans Bursary Fund (LBF). This is aimed at helping vulnerable and disadvantaged learners who are funding their learning with a loan, such as those with learning difficulties or disabilities, parents who need help with childcare and ex-military personnel.

The College adheres to Funding Agency guidelines regarding eligibility for and distribution of the fund. The College is not allowed to move funds between Discretionary Learner Support 19+ (DLS) and the Loans Bursary Fund (LBF).

LBF comprises of:

- Discretionary LBF for hardship and 20+ childcare
- Learning support, for example teaching assistants or any reasonable adjustment under the Equality Act 2010.

Students must be eligible for a loan, have had this loan approved by the Student Loan Company, and enrolled on an approved course to receive LBF. The eligibility of students for funding is determined by the Funding Agency Funding Rules. All awards are based on need and evidence/assessment of income/benefits will be required to support all claims.

The College will make clear to all learners in receipt of support that it is their responsibility to contact the Department for Work and Pensions (DWP) if necessary, as support may affect eligibility for some benefits.

## 9.2 Allocation and Priorities

The funds are to provide support for learners in receipt of a loan<sup>6</sup> who need financial support to meet the costs associated with learning and attending College.

All awards are subject to funding being available. The College will allocate as its first priority a sufficient percentage of the overall allocation to cover the costs of learning support. The residual will be allocated to the discretionary element. Once the LBF allocation is fully committed, no further awards can be made from the discretionary element unless funds can be vired from the learning support element. Information will be provided to students regarding other forms of financial support as appropriate.

The fund will not be used for course fees. It cannot be used for any item which is a mandatory element of the course as this will be included in the course fee. Types of support available include:

- Course related costs not included in the fee (e.g. contributions to trips, equipment and uniform)
- Transport
- Exams, professional membership fees and registration fees
- Meals
- Childcare (for learners aged 20 or older on their first day of learning)
- Digital Grant
- UCAS Fees
- Funds for travel to visit a university or to a job interview

Learning support or any necessary adjustments under the Equality Act must be funded from the LBF. The College will carry out a robust assessment to identify students' learning support needs. Evidence of assessment and individual needs must be retained for audit purposes.

The College will prioritise vulnerable groups such as:

- Parents who need help with childcare who are at risk of not starting or continuing because of childcare costs
- Learners who are economically or socially disadvantaged and are facing financial difficulty

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<sup>6</sup> Loan throughout this policy refers to 19+ advanced learner loans only and excludes HE loans. This bursary is solely for learners who have had a loan approved by the Student Loan Company, and who have an assessed need.

- Learners who are disabled, physically or mentally and/or have learning difficulties
- Ex-military personnel

Learners who are financially disadvantaged, who are not eligible for such support from other government sources, are a key group. For example, those mandated to training by DWP would be expected to receive support from DWP funds in order to protect the discretionary pot. From August, all who have been 'mandated' to training (whether on a full- or part-time basis) by Job Centre Plus have their travel and childcare costs met by Jobcentre Plus where required.

The College aims to distribute all available resources to students on a needs basis and will not pay weekly attendance allowances or achievement/attendance bonuses. The fund will not be used to pay learners' fees relating to learning.

The LBF will only be used to pay for childcare for learners aged 20 or older on the first day of learning who are at risk of not starting or continuing learning because of childcare costs. Childcare costs are only eligible if they are from a childminder or childcare provider registered with Ofsted. Informal childcare e.g. by a relative will not be funded. Learners aged under 20 must use the Care to Learn programme to fund their childcare costs. The LBF cannot be used to top up care to learn payments.

Appendix C sets out the College's processes and methodology for allocation and prioritisation for hardship and childcare.

### 9.3 Administration

The College will claim 5% of its total learner support expenditure as administration expenditure.

Completion of the relevant ILR fields is mandatory and failure to do so will affect future allocations.

LBF is paid to the College based on a profile (50% in August, 25% January and 25% April).

A mid-year funding forecast will be submitted in February, a year-end forecast submitted in June and a final claim made in October to the Funding Agency.

The online portal Pay My Student (PMS) shall be used to process all applications and store appropriate evidence.

### 9.4 Learning Support Funding

The LBF provides support for all learners funded by a 19+ learning loan who require 'in learning' support such as a learning assistant or any necessary adjustment under the Equality Act. To qualify, learners must have undergone a robust assessment which identified learning needs. Learners in receipt of support will be recorded using rate 2 (£150 monthly) within the learning delivery funding and monitoring fields of the ILR.

Any excess provided must be recorded using the Earnings Adjustment Statement and any excess will be set against the LBF.

Should support exceed £19,000 per annum any top-up may be claimed from Funding Agency.

## 9.5 Discretionary LBF Application

Students must complete an application form giving personal information, financial circumstances and Bank Details. This can be completed prior to enrolment. However, no award will be made until the student has enrolled, eligibility checked and evidence of income/benefits to support their application provided.

Students should apply for support from the fund as soon as possible and usually in advance of the start of teaching. Awards will be made against the criteria and once all funds are committed no further applications can be considered.

Incomplete applications and applications with no evidence of income attached cannot be processed. Students will be followed up and encouraged to complete the application.

## 9.6 Eligibility for LBF

The household income thresholds for support are as follows:

- Band 1 Up to £26,910 and/or in receipt of income-based benefits
- Band 2 £26,911 - £32,890
- Band 3 £30,891 - £39,865
- Band 4 £39,865- £42,495

These thresholds are updated annually in accordance with any increase/decrease in the national living wage.

Students assessed as being in Band 1 will be eligible to claim up to 100% of the maximum award subject to resource availability and need. Band 2 – 60%, Band 3 – 30% and Band 4 – 20%.

Examples of acceptable evidence to support eligibility include:

- P60 or Payslips showing Employment
- All pages of an up to date letter showing a benefit or income
- The 3 most recent Universal Credit Award Statements
- All pages of the current Tax Credits Award
- Bank statements showing 3 consecutive payments of a benefit or income.

Benefits designed to help with the extra costs caused by a disability will not be included in any assessment of income. These include:

- Disability Living Allowance (DLA)
- Access to Work
- Attendance Allowance
- Personal Independence Payment (PIP)

Students 19+ living independently of parents will be treated as an independent adults and evidence of parental income will not be required.

Where there is evidence of income based benefits then the student will automatically be allocated to Band 1. These include Working Tax Credit and Housing Benefit.

The Eligibility criteria for FEM shall be used to automatically allocate students aged 19+ into Band 1 (note 19+ students are not eligible for FEM).

Where the household has more than two dependants, the application (should it be approved as band 2 or 3) will be moved to the next band i.e. a band 3 assessment would be moved to band 2 and a band 2 to band 1 with band 1 being the highest level of support

Subject to funding being available, students with a household income in excess of ££42,495 may, in exceptional circumstances, be eligible for support subject to the recommendation of their Student Support Manager and approved by the Director of Learner Services.

All awards made are subject to satisfactory attendance<sup>7</sup>, progress, and behaviour<sup>8</sup>. Level of attendance and conduct are checked before any payment (or follow on payment) is made and allocation of funds may be withheld should satisfactory levels not be achieved. On the recommendation of a personal coach/ Student Support Manager may approve the payment of an award where attendance is below the 90% minimum standard i.e. where financial support would aid attendance and/or where there are extenuating circumstances. These standards are clear and communicated to all students.

All awards are based on financial need and evidence/assessment of income/benefits will be required to support all claims. The College will retain evidence that the student is eligible for a bursary and has agreed to the terms and conditions.

Learners who are eligible for support are not automatically entitled to the maximum allocation.

Students may have received an award in previous years; this is no guarantee of future awards. Students must make an application each academic year.

## **9.7 Emergency Payments**

Emergency payments are excluded from the income threshold eligibility assessment. Funds for all beneficiaries will be allocated to ensure emergency payments can be processed promptly throughout the year. Such emergency payments are designed to address the immediate needs of a student who may find themselves homeless or in severe financial hardship in order that they can continue with their learning. The fund is not a replacement for welfare benefits and must be authorised by College Leadership Team or Safeguarding Inclusion Manager.

## **9.8 The Financial Framework**

The maximum discretionary award (excluding childcare) is £1,500 per full time student (pro rata for part time and as per the income bands). This can be increased on the authority of the Student Finance Committee in exceptional circumstances to ensure that students are fully supported. All discretionary awards are subject to resource availability. This £1,500 is not an automatic entitlement but a ceiling for awards – all of which are dependent on affordability.

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<sup>7</sup> The College target is 100%. Students attending less than 90% may have payments withheld unless their Senior Tutor authorises payment.

<sup>8</sup> Students with a Level 3+ disciplinary sanction may have payments withheld unless their Senior Tutor authorises payment.

Funds are given to support the costs of attending College and associated study. It is not an income-based welfare benefit to contribute to overall household income. Any awards may be repayable if the student fails to complete the course, their attendance is at an unacceptable level, they are in receipt of level 2+ disciplinary or effort is considered to be below a satisfactory level. If the student fails to meet these conditions, they must be aware that they may be asked to repay funds and will be invoiced accordingly.

Any loans issued to learners from the fund should be repaid in full by 31 July of the current academic year. No loan issued via the fund will be subject to interest.

Support will be granted to students in line with the broad categories in the table listed in Categories of Financial Support.

Payments to students, if not in kind, will be made by BACs to the student's own bank account. Cash payments cannot be made to any learner who is seeking asylum in the UK. Non-cash support may be given to eligible students in the form of course related books, equipment or a travel pass.

## 10 Categories of Financial Support

Support will be granted to students in line with the broad categories in the table below:

<b>Childcare</b>	<p>20+ childcare provides targeted childcare support for learners who are at risk of not starting learning or not continuing learning as a result of difficulty getting childcare.</p> <p>Students under 20 years old on the date their learning programme begins may be eligible for the 'Care to Learn' scheme. Students should apply for the 'Care to Learn' scheme for childcare and associated transport. Further details can be obtained from <a href="http://www.direct.gov.uk/caretolearn">www.direct.gov.uk/caretolearn</a> or telephoning 0800 121 8989. Discretionary awards cannot be made for 16-19 childcare.</p> <p>Students older than 20 years may be given an award towards childcare based on the number of course hours attended and essential private study. It is possible to apply for funding up to the tariff charge at Nursery @B63Funding will be provided for timetabled hours and for the course duration. Retainers are not paid during holidays.</p> <p><b>If a place is available, students must make use of the nursery facilities provided by Nursery@B63.</b> Consideration will be given to providing support for external nurseries only where extenuating circumstances apply. Funding is only available for Ofsted registered childcare. Funding cannot be used to contribute to the overall costs of running a crèche.</p> <p>Students entitled to any Government Funded Childcare hours should utilize these before any College funding is used. The college will only fund where there are remaining fees to be paid.</p>
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	<p>The College will not enter into a contract with a nursery. The student is responsible for the payment to the nursery and must abide by the terms and conditions of that provider. However, the bursary fund will make payment direct to a nursery on behalf of an eligible student.</p>
<b>Course related costs</b>	<p>Course related costs include equipment, uniform and kit. Awards are based on the requirements of the course as defined by the Head of Division and approved by the relevant Assistant Principal.</p> <p>If learner support funds are used by the College to purchase equipment for individuals then this remains the property of the College and should be reused unless wear and tear, health and safety, and/or hygiene deem this inappropriate.</p> <p>Students should not incur cost for items without which they could not complete their course (refer to Policy on Charging Students).</p> <p>Stationary will not ordinarily be funded.</p> <p>For 19+ students course costs under £100 require a claim to be made with proof of purchase and costs above £100 can be paid directly to the student before purchase.</p>
<b>Meals</b>	<p>Meals at College may be provided via a cashless retail scheme redeemable at College outlets (excludes non-food items). Eligible students will be entitled to an allocation of up to £4.50 per day (banded). Pro rata for part-time.</p> <p>Students in receipt of free FE meals (FEM) are entitled to £2.41 per day with a top up of £2.09. Note the agency have removed the ring-fence between the 16 to 19 discretionary bursary and free FE meals.</p> <p>All full-time students will receive £22.50 (banded) per week loaded on their ID card to cover meals.</p> <p>Where students are off-site the College may provide a cash allowance in the form of a BACS payment or other cashless alternative such as a supermarket gift card.</p>
<b>Emergency Payments</b>	<p>Emergency payments are excluded from the income threshold eligibility assessment. Funds for all beneficiaries will be allocated to ensure emergency payments can be processed promptly throughout the year. Such emergency payments are designed to address the immediate needs of a student who may find themselves homeless or in severe financial hardship in order that they can continue with their learning. The fund is not a replacement for welfare benefits and must be authorised by College Leadership Team or Safeguarding Inclusion Manager.</p> <p>These are considered to be one off awards and are in excess of the £1,200 maximum overall allowance. Usually, an emergency payment will not exceed £100. Ongoing support will be discussed on an individual basis involving any external agencies as required.</p>
<b>Student Visits</b>	<p>Students may apply for support towards the costs of a student visit(s) up to a maximum of £500 per annum.</p>

<b>DBS (Disclosure and Barring Service)</b>	<p>Students may apply for funding to cover other costs such as Disclosure and Barring Service checks etc. as appropriate. Awards shall be made within the overall funding limit.</p> <p>Fully funded learners who require a DBS check to take part in learning must be funded by the College.</p>
<b>Grants and Loans</b>	<p>Cash up to maximum grant value can be allocated to eligible learners to support the costs of learning in the form of a grant or loan.</p> <p>A Digital Grant of up to £300 to help students have access to their own IT equipment to support their learning.</p>
<b>Tuition Fees and Registration Fees</b>	<p>The College is unable to use its allocation to support the costs of tuition fees but may use the fund to support the College registration fees, costs of professional body memberships and UCAS fees (to support progression).</p>
<b>Transport</b>	<p>All students can access the Express Coach Service during term time. There is charge of £75 per term for use of the coach which will be paid from the Learner Support Fund. Students not in receipt of the fund may be awarded a college bursary to cover the charges but this will be withdrawn if their attendance, behaviour and attainment falls below the required level. For any student who is unable to use the College service due to their geographical location, they may apply for support with transport costs. There may also be extenuating circumstances such as health as to why a student cannot use the Coach Service; this will be considered on an individual basis when reviewing their funding for travel. The maximum award should be equivalent to an annual bus pass (approximately £100 per term). This may be funded in kind using the Network West Midlands app.</p> <p>Petrol costs will not normally be paid in accordance with the College's Green Travel plan. Reasonable commuter walking distances to a bus stop will be considered when deeming if an express route is unsuitable (ref Institute of Highways and Transportation Guidance).</p> <p>The fund may support the costs of attending interviews etc. linked with progression.</p> <p>The fund may support the costs of attending work placements etc.</p> <p>The College will adhere to the transport plan of the Local Authority and not routinely pay for transport which they have a statutory responsibility to provide. Transport costs can be covered but block contributions are not allowed nor is funding of transport costs that are covered in the Local Authority's statutory duty.</p>
<b>Work Placement</b>	<p>Students undertaking an extended work placement may seek support for the increased costs of travel and/or equipment and clothing. The maximum award is £120 per year.</p> <p>The fund will support the cost of public transport to and from work placement. This will usually be in the form of pre-purchased day savers rather than cash payments.</p>
<b>Other costs</b>	<p>Students may apply for funding to cover other costs as appropriate. Awards shall be made within the overall funding limit.</p>

## 11 Administrative Procedures

The College has procedures that

- record the details of all applications
- account for the funds distributed to students
- identify unspent funds at the year end
- ensure the correct information is included in the ILR
- retain evidence for audit purposes

All students are provided with information about alternative forms of financial support on request. It is clear to students which bursary they are being supported from.

## 12 Student Finance Committee

The management of the fund is via the Student Finance Committee. All meetings are minuted and minutes reported to the College Leadership Team. The Committee meet at least every half term and comprise:

- Student Hub Manager
- Chief Operating Officer (Chair) Director of Learner Services
- Finance Team Leader
- Student Support Manager (one from each faculty)
- Student Services Officer
- Student Experience Manager

Student and parental input is established by focus groups. The College observes its commitment to Green Travel, its Fitness to Travel Policy and the transport plan of the Local Authority in terms of supporting costs of travel.

The terms of reference of the Student Finance Committee are:

- To oversee the allocation of the various strands of 16-18 bursary, 19+ learning loans (hardship and childcare) in accordance with the policy approved by the Corporation.
- To monitor equal opportunity trends and liaise with senior managers to ensure remedial action is taken as necessary.
- Seek input from students and parents.
- To ensure that the fund(s) are advertised to students.
- To ensure that the policy which reflects the funding agency rules is applied.
- To consider operational matters which require Committee input.
- To contribute to the annual policy review.
- Ensure that appeals are referred to and complaints dealt with in accordance with college procedures via the Principal's office.
- To ensure that eligibility and levels of award are determined by the policy.
- To oversee the management and delivery meals (FEM) for students entitled to this mode of support.

## 13 Equality and Diversity

The College is compliant with the requirements of the Equality Act 2010 and supports the principles of equality and diversity in the disbursement of the fund. Regular reports monitor the distribution of the fund across various student cohort groups including ethnicity, gender, disability and level of programme. The impact of the fund on students' attendance, retention and achievement especially in relation to minority groups is reported via the Student Finance Committee. The College will not discriminate against students on the basis of their protected characteristics. This policy will be impact assessed via the Equality and Diversity Consultative Forum.

## 14 Audit

Bursary funds are subject to audit as part of the usual assurance arrangements. Evidence provided to support applications must be retained for audit purposes for a period of six years plus the current year.

The College will maintain accurate and up to date records that evidence which students receive support; confirm student eligibility for funding, and demonstrate appropriate use of funds.

## 15 Confidentiality and Data Protection

Students may have privacy or confidentiality concerns because of fear of stigma. The College has an approved data protection policy which adheres to all data principles and is compliant with GDPR.

Students can speak to Student Services confidentially about bursary matters and the College will inform the student how their information will be used and shared to avoid embarrassment.

The requirements of GDPR must be adhered to for all data collection, processing and storage.

## 16 Fraud Declaration

The Fund is public money and fraudulent claims are serious. A student's failure to declare income that is subsequently discovered will mean withdrawal of commitment of future funds and billing for the return of funds already provided. In such circumstances the student may be subject to disciplinary action.

The College is responsible for investigating and reporting any incidences of fraud in accordance with financial regulations and the anti-fraud suite of policies.

The College will make students and their families aware that the submission of false information regarding income/benefits may be referred to the Department for Education or the police as necessary.

If the College finds evidence that misleading or fraudulent information has been knowingly submitted by a student or parent, resulting in the student receiving a bursary they were not entitled

to, the College will attempt to recover the overpayment from the student. Significant fraud must be reported to the Funding Agency. The funding agency defines significant fraud as over £1,200, the particulars are novel, unusual, systematic or complex, or there is likely to be great public interest.

## **17 Invoicing Students – Return of Funds or Items**

Any awards may be repayable if the student fails to complete the course, their attendance is at an unacceptable level or effort is considered to be below a satisfactory level. If the student fails to meet these conditions, they must be aware that they may be asked to repay funds and will be invoiced accordingly.

When deciding to invoice students the College via the Student Finance Committee should balance the need to protect public funds with the ability of students to repay the funds given their financial hardship which made them eligible for the funds. Fraudulent claims should always be invoiced.

An alternative to invoicing the student may be the return of the equipment, uniform etc. unless wear and tear, health and safety, and/or hygiene deem this inappropriate.

## **18 Underspends**

In accordance with agency guidelines any underspent bursary funds will be ring fenced for student support and carried forward (for one year only) to the new academic year. These funds must be used first before using the new academic years allocation.

In the case of the LBF the ESFA will use the mid-year funding claim/forecast to determine remaining payments and may adjust future payments down. There is no automatic payment for delivery above our allocation. All loan bursary funding not spent must be paid back and this will be identified in the reconciliation statement. Only delivery below 90% is recovered e.g. delivery of 85% will result in 5% being recovered. The ESFA will seek recoveries in December.

## **19 Policy Review**

This policy is subject to annual review and as required by Funding Agency Rule updates.

## **20 Complaints**

Appeals against decisions relating to learner support should be directed in the first instance to the Learner Services Director. The appeal will be considered, and a response issued within 14 days. Complaints should be directed to the Principal in accordance with the complaints policy of Halesowen College which can be found on the website.

## 21 Appendix A - 16-19 Bursary Allocation Summary Staff Guide

This is based on a student assessed into Band 1. Band 2 and 3/4 students will be eligible for 60% and 30% of these amounts respectively.

<b>Childcare</b>	Not applicable: Care to Learn only
<b>Course Related Costs (Equipment/Uniform etc)</b>	Equipment/Uniform confirmed    Maximum <b>£500</b> by the Head of Division
<b>Meals</b>	Maximum <b>£810</b> (based on 36 weeks)
<b>Digital Grant</b>	Maximum £300
<b>Transport</b>	Approx. <b>£100</b> per term if an express coach is not suitable – plus work placement and interview costs. £75 per term for the Express coach service
<b>Student Visits</b>	Maximum <b>£500</b>
<b>Grant or Loan</b>	<b>Award maximum</b>
<b>Total</b>	<b>Maximum £1,500</b>
<b>+</b>	Emergency payment £100
<b>+</b>	Vulnerable bursary (eligible students) £1,200

The figures show maximum awards for a full time student studying a minimum of 450 hours per academic year. For part time students the awards would be pro rata based on the number of course hours.

## 22 Appendix B - 19+ Discretionary Learner Support Staff Guide

This is based on a student assessed into Band 1. Band 2 and 3/4 students will be eligible for 60% and 30% of these amounts respectively.

<b>DLS Childcare</b>	20+ students only Up to £232.50 per child per week (Nursery@B63 costs)
<b>Total</b>	<b>Maximum £8,370 per child</b>
<b>Course Related Costs (Equipment/Uniform etc)</b>	Maximum <b>£500</b> Claims will be made for any Equipment/Uniform needed. Under £100, we require a receipt.
<b>Digital Grant</b>	Maximum £300
<b>Meals</b>	Maximum <b>£810</b> (based on 36 weeks)
<b>Transport</b>	Approx. £100 per term if an express coach is not suitable – plus work placement and interview costs £75 per term for the Express coach service
<b>DBS</b>	Cost of check for co-funded learners only
<b>Student Visits</b>	<b>Maximum £500</b>
<b>Grant or Loan</b>	Award maximum
<b>Total</b>	<b>Maximum £1,500</b> (excluding childcare)
<b>+</b>	Emergency payment £100

The figures show maximum awards for a full time student studying a minimum of 450 hours per academic year. For part time students the awards would be pro rata based on the number of course hours.

## 23 Appendix C - Advanced Learner Loan Bursary Staff Guide

This is based on a student assessed into Band 1. Band 2 and 3/4 students will be eligible for 60% and 30% of these amounts respectively.

<b>LBF Childcare</b>	20+ students only Up to £232.50 per child per week (Nursery@B63 costs)
<b>Total</b>	<b>Maximum £8,370 per child</b>
<b>Course Related Costs (Equipment/Uniform etc)</b>	Maximum <b>£500</b>  Claims will be made for any Equipment/Uniform needed. Under £100, we require a receipt.
<b>Digital Grant</b>	Maximum £300
<b>Meals</b>	Maximum <b>£810</b> (based on 36 weeks)
<b>Transport</b>	Approx. £100 per term if an express coach is not suitable – plus work placement and interview costs £75 per term for the Express coach service
<b>Student Visits</b>	<b>Maximum £500</b>
<b>Grant or Loan</b>	Award maximum
<b>Total</b>	<b>Maximum £1,500</b> (excluding childcare)
<b>+</b>	Emergency payment £100

The figures show maximum awards for a full time student studying a minimum of 450 hours per academic year. For part time students the awards would be pro rata based on the number of course hours.