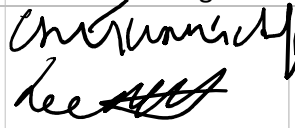



Policy title:	Learner Bursary Policy and Procedure		
Scope:	Achieve Training		
Policy owner & job title:	Cheryl Tunnicliffe - Head of Study Programmes and Lee Mellor- Funding and Compliance Manager		
Signed:		Date:	13/07/22
Approver:	Dan Canavan – Executive Director of Achieve Training		
Signed:		Date:	13/07/22
Date:	13/07/22	Review Due Date:	13/07/23

POLICY SUMMARY

The learner bursary fund is a sum of money that can be accessed by young learners to support them with their chosen course of study.

The Bursary fund helps learners with the essential costs of participating in their programme of study e.g. travelling to an Achieve Training Centre, equipment, uniform/clothing, trips, and other costs associated with learning. The bursary fund cannot support costs not related to education e.g. learner support, extra-curricular activities, mentoring or extra tutoring.

It is funded by Education and Skills Funding Agency (ESFA) and has two elements:

- **Defined Vulnerable Groups Award** – awards are determined through the Student Bursary Support Service (SBSS) online portal and administered by Achieve Training
- **Discretionary Award** – awards are determined and administered by Achieve Training

Achieve will support learners with applications to either fund and ensure that a consistent and transparent process is in place for this purpose.

This document sets out the eligibility criteria for both, what will be funded and the amount that can be awarded.

ASSOCIATED POLICIES, PROCEDURES AND GUIDANCE

- Acceptable Behaviour Policy
- Equality and Diversity Policy – (This policy has been considered in the writing of the Bursary Policy)
- 16 -19-year-Old Bursary Fund Guidance - ESFA
- Free School meals Guidance- ESFA

WHAT A BURSARY AWARD CAN BE USED FOR AND HOW MUCH WILL BE PAID

Bursary fund payments will not be made as regular payments for living costs. The award is to be used for essential course related costs.

Payment will not be made for laptops or tablets except in exceptional circumstances. Any laptops or tablets purchased through the discretionary bursary must be returned to Achieve Training on the completion of the course

Defined Vulnerable Groups Bursary - An amount up to £1,200 per year will be paid to a learner participating on a study programme that lasts for 30 weeks or more. Learners on study programmes of less than 30 weeks will be paid a pro-rata amount based upon the number of study hours involved.

Award of the bursary is based upon need; situations where the eligibility criteria is satisfied but the learners' financial needs are already met from other sources, they have no relevant costs or do not need the maximum award the application will be reduced or refused.

Achieve Training will consider supplementing the bursary for defined vulnerable groups with its own resources or from the discretionary fund where it is considered that a learner needs extra help to remain in education. Payment is dependent upon household income and the availability of funds within the Discretionary Bursary budget.

Discretionary Bursary – The amount awarded is based upon clearly identified need of the individual learner, and three household income brackets:

- Group 1 Household income under £16,190
- Group 2 Household income £16,190- £20,000
- Group 3 Household income £20,001-£28,500

The table below indicates the types of support to be covered by the award and expected maximum allocations relating to eligible groups. This is to provide an example and individual needs will determine allocation of funding support.

Expense/Support	Eligible Group	Amount
Emergency Food Allowance (limited period)	All learners, not dependent on household income.	Free lunch and breakfast package from the canteen. Or £4 per day if on work placement.
Food Allowance on Work Placement	All groups	£4 per day Learners eligible for FME will receive the top up of £1.59 from bursary fund.
Interview Clothing	Vulnerable	Up to £100 per academic year
	1	Up to £100 per academic year
	2	Up to £75 per academic year
	3	Up to £50 per academic year
Travel where bus pass cannot be utilised	Vulnerable	Up to £300 per academic year
	1	Up to £300 per academic year
	2	Up to £200 per academic year
	3	Up to £100 per academic year
Suitable clothing for training	Vulnerable	Up to £200 per academic year (max of £100 in 6 months)
	1	Up to £200 per academic year (max of £100 in 6 months)
	2	Up to £150 per academic year (max of £75 in 6 months)
	3	Up to £100 per academic year (max of £50 in 6 months)
Learning Materials and equipment	Vulnerable	Up to £100 per academic year
	1	Up to £100 per academic year
	2	Up to £75 per academic year
	3	Up to £50 per academic year
Wifi credit	ALL	£10 per month

Exceptions from standard levels can be made when personal circumstances or academic need suggest that a higher level of support is required. This needs to be supported by professional recommendations from tutors or external bodies and awards will be determined on a case-by-case basis at the discretion of Wellbeing and Development staff.

ELIGIBILITY TO APPLY

Applicants to the Learner Bursary Fund must be:

- Enrolled on a course at Achieve Training which is NOT part of a government training scheme
- Aged 16 years or over
- A “home” learner, i.e. having been ‘ordinarily resident’ in the British Isles or European Union for purposes other than education for 3 years prior to the commencement of the course
- In one or more of the priority groups listed below **or** live in a household where they are in receipt of a benefit listed below.
- income is below £28,500 per annum, for the 2021/22 academic year
- Maintaining satisfactory attendance and progress in the professional judgement of their Support worker
- Students aged 19 or over are only eligible to receive a discretionary bursary if they are continuing on a study programme, they began aged 16 to 18 (‘19+ continuers’) or have an Education, Health and Care Plan (EHCP).

There are two types of bursary award and whilst the above criteria apply to both, each route has additional elements that need to be satisfied are listed below.

Defined Vulnerable Groups Bursary

Learners aged 16 to 18 (at the start of the academic year) will be eligible for a bursary of up to £1200 a year if they are:

- Young People in care
- Care leavers
- Young People who are living with foster parents
- Receiving Income Support or Universal Credit because they are financially supporting themselves or financially supporting themselves and someone who is dependent on them and living with them such as child or partner.
- Receiving 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

Discretionary Bursary

Learners aged 16-18 (at the start of the academic year) who face genuine financial barriers to staying on in education and training may be eligible for help with costs such as transport to Achieve Training, work placements and interviews, meals, essential trips, work wear, uniforms and equipment.

Learners living with parent(s)/carer(s)/Guardian(s) OR who live with a spouse/partner who is in receipt of any of the benefits below may be eligible for a discretionary bursary:

- Income Support
- Universal Credit

Awards will be determined based on the set household income levels and based on the specific areas of need identified through the application process. All households with an income of less than £28,500 per annum may be eligible for support.

Further Education –Free Meals

To be eligible for free meals the learner, parents or carer must be in receipt of one of the following:

- Income support
- Income based job seekers allowance
- Income related employment and support allowance
- Support under part VI of the Immigration and Asylum Act 1999
- The guaranteed element of pension credit
- Child tax credit (provided they are not entitled to working tax credit) and have an annual gross income of no more than £16,190
- Working tax credit run on – paid for 4 weeks after you stop qualifying for working tax credit
- Universal Credit

Learners that are not eligible for free school meals but are eligible for a discretionary bursary will be awarded a lunch allowance when on work placement.

APPLICATION PROCESS AND PROMOTION

Applications for a bursary must be made through the online application form on the Achieve Training website.

Promotion of the bursary fund will be carried out in several ways to ensure the maximum number of learners who need help are identified:

- Staff will publicise the availability of the funds during learner inductions.
- Wellbeing and Development staff will identify learners who experience a change in circumstances during the year that has resulted in them experiencing financial hardship.

- An overview of the process will be shared with all learners and access to one-to-one Wellbeing and Development interviews as appropriate will be ensured.

ASSESSMENT PROCESS

Assessment of each application will be undertaken through a two-stage process of initial assessment followed by secondary quality and assurance checks; applications will be determined as follows:

Defined Vulnerable Groups bursary applications will be determined on the evidence that applicants provide through the application process and Achieve Training will submit this on behalf of the learner to the Student Bursary Support Service (SBSS) online portal.

Achieve Training will obtain proof that the applicant meets the criteria in full and will ask for evidence from each learner and retain copies for audit purposes.

For example:

- For learners who are in care or a care leaver, written confirmation of their current or previous looked-after status from the relevant local authority. The evidence could be a letter or an email but must be clearly from the local authority.
- For learners in receipt of IS or UC, a copy of their IS or UC award notice. This must clearly state that the claim is in the learner's name/confirm they are entitled to the benefits in their own right. For learners in receipt of UC, Achieve Training must also see a document such as a tenancy agreement in the learners name, a child benefit receipt, children's birth certificates, utility bills etc.
- For learners receiving UC/ESA and Disability Living Allowance (DLA) and Personal Independence Payments (PIP), a copy of their UC claim from DWP. Evidence of receipt of DLA or PIP must also be provided.

Universal Credit claimants will be able to print off details of their award from their online account or provide a screenshot.

Achieve Training will only submit a funding claim to the Student Bursary Support Service (SBSS) online portal¹ when:

- Achieve Training has seen and verified appropriate evidence to confirm that the learner is eligible for the bursary for vulnerable groups, and
- The actual amount of financial help the learner needs to participate has been assessed. It is this amount that Achieve Training will request from the SBSS.

Discretionary bursary awards will be determined based on the set household income levels and the specific areas of need evidenced in the application and subsequent allocation meetings.

Applications will be prioritised in accordance ESFA guidance. Each application for a bursary is judged on the basis of 'relative financial need' and not all applications will be successful.

Decisions will be recorded, applicants will be notified via letter or email and invited by their tutor or coach to discuss and agree your individual needs which will determine your entitlement.

Details of the estimated total allocation of funds for each applicant will be entered onto a database that analyses the applicants' data per the ESFA return requirements.

The discretionary, bursary awards will be subject to sufficient funds being available and the estimated total allocation of funds will be monitored continuously while applications are being processed to ensure the most effective use of funds.

RIGHT TO APPEAL

If the applicant does not agree with the decision, they can give notice that they wish to appeal through their tutor or coach. Alternatively, they can email bursaryenquiries@achievetraining.org.uk.

The applicant must give notice of their appeal within 10 working days from receipt of the original decision, state their reasons and why the decision is unfair.

A panel will be convened within 20 working days from receipt of the appeal and will comprise of members from Achieve Training Senior Management Team.

The applicant will be asked to attend a meeting of the panel and may wish to be accompanied by a friend / representative.

The panel will review the application together with any further information submitted in the appeal and notify the applicant of its decision in writing within 5 working days of the panel meeting

The decision of the panel will be final.

PAYMENT

Payment will be made direct from Achieve Training to a third party wherever possible. (e.g. bus passes, trips, work wear and equipment).

If deemed necessary any weekly payments will be made by BACS transfer into learner's bank account, meals will be deducted if required.

Learners eligible for free meals, will collect a meal from the canteen

Monies will be withheld where attendance or behaviour proves to be unsatisfactory

Where learner's attendance drops below 90% payments will require authorisation and confirmation of satisfactory academic progress from the Tutor.

Learners who have received financial assistance and leave before the completion of their course may be required to repay all or part of the discretionary bursary.

MANAGEMENT & REVIEW

Achieve Training will retain evidence to show how they have awarded the amount of bursary they have to each learner.

Achieve Training will ensure learners are eligible for the bursary fund each year – their circumstances and needs can change.

Achieve Training will retain copies of any documents the learner has signed to give formal agreement to their bursary fund conditions, including the impact on payments if they do not attend and the institution's rules about returning equipment paid for from the bursary funds.

Achieve Training have more than one person who can process bursaries so there is a contingency plan if that person was absent.

This Policy and Procedure will be reviewed and updated where necessary in line with guidance from the ESFA, including the Free School Meals guidance.