

Policy title:	Bursary Policy		
Scope:	PM Training		
Policy owner & job title:	Hannah Warburton, Head of Learner Development & Wellbeing		
Approver:	Jason Lancaster, Director of Training Operations (PM)		
Date:	November 2020	Review Due Date:	1 st August 2021

POLICY SUMMARY

PM Training recognises that the Learner Bursary has an important role to play in removing barriers for some learners accessing and completing their education courses. It is the aim of PM Training to use funds to make the maximum impact on retention, achievement and success rates.

The fund will be distributed in a consistent and transparent way in accordance with the guidance issued by the Education and skills funding Agency (ESFA)

The bursary is intended to help with the needs of the individual young person studying a programme of learning with PM Training. Awards from the Bursary will be used towards essential course related costs.

Discretionary awards will be subject to sufficient funds being available.

For clarity, Bursary payments are entirely separate to the Learner Incentive Payment scheme funded separately by PM Training.

Associated Policies & Procedures:

Includes: - Acceptable Behaviour Policy
Equality and Diversity Policy

1. POLICY STATEMENT

Any bursary payment that is provided is dependent upon a number of factors and support may be reduced or withheld if the learner does not meet the conditions that are expected of them.

Payments are subject to satisfactory attendance and engagement in their learning programme.

The bursary should be applied fairly and consistently.

The process must be easily understood and accessible to young people. Staff will provide an overview of the process to all learners and learners will be able to see Wellbeing and Development staff for a one-to-one interview if required. The Learner Bursary and Fund will be publicised via the Recruitment Team, Wellbeing and Development staff and PM Trainings website.

The process should identify eligible learners in a timely fashion.

There is a commitment to ensuring bursary funds allocated to PM training are fully distributed in order to support as many learners as possible, however, budgets are provided by the ESFA, and therefore, PM Training can only make payment if there are sufficient funds to do so.

2. ELIGIBILITY

To be eligible to apply for the Learner Bursary Fund learners must be:

- Enrolled on a course at PM 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 or live in a household where they are in receipt of an eligible benefit listed in section 5.
- Income is below £28,500 per annum, for the 2020/21 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).

Guaranteed Bursaries:

Learners aged 16 to 18 (at the start of the academic year) could 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.
- Disabled young people in receipt of Personal Independence Payments and Employment and Support Allowance or Universal Credit

Further Education free meals:

To be eligible for the guaranteed free meals, the learner or their parents /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

However, PM training can pay a discretionary bursary for Free Meals depending upon the household income. All payments are dependent on the money still being available within the Discretionary Bursary budget.

Discretionary Bursaries:

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 PM 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 eligible benefits below are eligible for a discretionary bursary:

- Income Support (or Universal Credit)
- Income Based Job Seekers Allowance
- Income Based Employment and Support Allowance
- Disability Living Allowance (Personal Independence Payments)
- Child Tax Credit (and NOT eligible to receive working tax credit) with an income of £16 190 or less.
- Support Under Part VI of the Immigration and Asylum Act 1999
- Working Tax Credit Run on (Paid for 4 wks after you stop qualifying for WTC)
- Guaranteed Element of Pension Credit
- Housing Benefit
- Incapacity Benefits
- Council Tax Credit
- Working Tax 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.

For learners with a household income over £28,500 and under £35,000 per annum they may be able to apply to The Realise Foundation for support with work wear and equipment.

3. PROCEDURES

Applications must be made via the online application form on PM Trainings website. Promotion of the 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 interviews and inductions.
- Development and Wellbeing staff will identify learners who experience a change in circumstances during the year that has resulted in them experiencing financial hardship.

16 -18 Discretionary, bursary awards will be subject to sufficient funds being available.

Applicants must provide evidence as detailed on the bursary application form. Applications will be prioritised in accordance with EFA and SFA guidance. Each application for a bursary is judged on the basis of 'relative financial need' and not all applications will be successful. Details of the estimated total allocation of funds for each applicant will be entered onto a database that analyses the applicants' data per the EFA and SFA Return requirements. The estimated total allocation of funds will be monitored continuously while applications are being processed to ensure the most effective use of funds.

4. ASSESSMENT

Awards for vulnerable groups will be made on the basis of confirmed eligibility with the criteria set out earlier. All other 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. Learners will not necessarily receive the full amount potentially available.

Applications will be subject to a two-stage process involving initial assessment and a secondary quality and compliance check. The outcome will be recorded and applicants will be notified in writing of the decision.

Applicants may appeal against the assessment decision. **See SECTION 7.**

Once the assessment has been completed your Tutor/Coach (whoever is the most appropriate depending upon the Centre you are based at) will be informed of the outcome and you will be invited to discuss and agree your individual needs which will determine your entitlement.

If the learner does not agree with the decision then they can raise an appeal either at the time they are notified of the decision by Tutor / Coach or by emailing bursary@pmtraining.org.uk.

The application will be reviewed by a Line Manager, who would contact the learner separately once this had been completed to give them feedback. If the learner is still not satisfied with the outcome, they can ask for the

appeal to be raised with a Superior – who will review the information received and will contact the learner directly with the outcome.

5. AWARDS

6.

Vulnerable Group Bursaries:

A payment of up to £1200 per academic year could be made (this amount is based on the learner’s course running for longer than 33 weeks and being classed as a full-time course. For shorter courses or if the course is classed as part time, a pro rata amount will be calculated).

Discretionary Bursaries:

Need relating to the discretionary bursary fund will be grouped depending on household income brackets as below:

Group 1- Household income under £16,190

Group 2 – Household income £16,190- £20,000

Group 3- Household income £20,001-£28,500

Allocation of funds will be made on an assessment of individual needs. However, the table below indicates the types of support to be covered by bursary funds and expected maximum allocations relating to eligible groups.

Expense/Support	Eligible Group	Amount
Food Allowance	ALL	£6 per day (if eligible for FME topped up from £2.41)
Interview Clothing	1	Up to £75 per academic year
	2	Up to £50 per academic year
	3	Up to £25 per academic year
Travel where bus pass cannot be utilised	1	Up to £100 per academic year
	2	Up to £75 per academic year
	3	Up to £50 per academic year
Suitable clothing for training	1	Up to £100 per academic year
	2	Up to £80 per academic year
	3	Up to £60 per academic year
Learning Materials and equipment	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

This is to provide an example and individual needs will determine allocation of funding support 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 PM Training on the completion of the course. Discretionary bursary payments will not exceed the maximum available funding of £1200.

Exceptions from Standard levels:

Exceptions from standard levels can apply when personal circumstances or academic need suggest that a higher level of support is required and this is supported by professional recommendations from tutors or external bodies. Bursary levels will be determined at the discretion of Learner Services staff.

7. PAYMENTS

Payments will be made direct from PM 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 may be deducted if offered in house.

Payment Criteria

Where attendance or behaviour proves to be unsatisfactory, monies will be withheld.

If attendance drops below 90% payments will require authorisation and confirmation of satisfactory academic progress from the Tutor.

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

8. APPEALS PROCEDURE

If the applicant does not agree with the panel's decision they should give notice that they wish to appeal via the Wellbeing and Development Team or the Sub-contractor with which they are enrolled

The applicant must give notice of their appeal within 10 working days from receipt of the original decision.

The applicant will be asked to state the reasons for disagreeing with the decision and why it is unfair.

A panel will be convened within 20 working days. The panel will consist of members from the 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 action taken by Wellbeing and Development Team/Compliance team, in the original decision.

The applicant will be notified of the panel's decision in writing within 5 working days.

The decision of the panel will be final.