



Policy/Procedure/Guideline Review

Policy/Procedure/ Guideline:	Bursary Fund Policy 2019-20
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Bursary Fund Policy

1. Introduction

Nelson and Colne College, including Lancashire Adult Learning and Accrington and Rossendale College ('The College') receives allocations of funding annually from the Education and Skills Funding Agency (ESFA) to provide financial support to our learners.

The College administers the Bursary Funds and distributes them to provide financial support in order to help learners overcome financial barriers to learning, ensuring they can take part in or continue learning and access educational and progression opportunities. The College recognises the positive impact of education on the lives of our learners and promotes the full participation in course related activities and College enrichment/extra-curricular programmes.

Any learner may apply for financial assistance and should be aware that their application will receive consideration in accordance with the eligibility requirements stated in Section 6 and 7.

The College provides information about and promotes access to financial support via information leaflets, the College websites, at interviews and at promotional events i.e. open evenings and school liaison events.

2. Purpose

The purpose of this policy is to ensure:

- Bursary funds are distributed in accordance with the regulations and guidelines laid out by funding agencies;
- The administration of the bursary funds meet learners needs and remove financial barriers to learning;
- The eligibility criteria for bursary funds is explained;
- Systems are in place to administer, record and monitor bursary funds, to ensure funds are used for their intended purpose.

3. Legislative/Quality Framework

The College will apply the following published guidelines for the appropriate age groups and funding types, for the use of these funds:

- 16 to 18 education: free meals in further education for academic year 2019 to 2020
- Funding Guidance for Young People 2019 to 2020 – Funding Regulations
- 16 to 19 Bursary Fund Guide: 2019 to 2020 Academic Year
- Adult Education Budget Funding and Performance Management Rules 2019 to 2020
- Advanced Learner Loans Funding Rules 2019 to 2020

Please note that as the above funding guidelines are updated, this policy will be amended to reflect changes as required.

4. Scope

This policy applies to all eligible (see Section 6 and 7) learners of Nelson and College, including Lancashire Adult Learning and Accrington and Rossendale College.

5. Abbreviations

ACL	Adult and Community Learning
AEB	Adult Education Budget
ALLB	Advanced Learner Loans Bursary
ESFA	Education and Skills Funding Agency
EHCP	Education and Health Care Plan
FCM	Free College Meals
VPF	Vulnerable Bursary Fund
HE	Higher Education

6. Bursary Eligibility Criteria

This policy covers the learner financial support funds which are available to eligible learners. Learners who apply for any of the funds will be assessed individually and awarded support based on their financial need. Please note:

- Bursaries are subject to available funds and eligibility does not guarantee entitlement to funds.
- Bursary payments are subject to attendance and behaviour in line with College Policies and Procedures.
- Bursary awards only cover one academic year and learners must re-apply for support on an annual basis.

To be eligible for funding from any of the College Bursary Funds, all learners must satisfy the following criteria. Additional specific eligibility requirements apply to each fund as listed within the Bursary Funds Section (7) below:

- Residency criteria as set out by the [ESFA funding regulations](#).
- Have a gross annual household income of £30,000 per year for childcare support – excluding Care to Learn. The College may choose to use its discretion where household income exceeds this amount but it is identified that support is needed.
- Able to demonstrate 'relative financial need' for costs that may deter them joining, continuing or completing their course.

Learners must also be on a course that is subject to inspection by a public body (e.g. Ofsted) and must also be:

- Funded directly by the ESFA or by the ESFA via a local authority
- Funded or co-financed by the European Social Fund
- Otherwise publicly funded and lead to a qualification (up to and including level 3) accredited by Ofqual
- On a 16-19 traineeship programme
- Non-employed learners participating in a Prince's Trust Programme.

The College reserves the right to apply discretion to ensure that individual learners' needs and personal circumstances are taken into account when decisions are made.

Learners Not Eligible

The following learners are not eligible to receive any financial assistance from the below Bursary Funds (excluding the College Benefit Fund):

- On an apprenticeship programme, or any waged training, are employed, rather than in education (excluding care leavers) or;
- Receiving help with travel/childcare costs through JobCentre Plus or Work Programme provider;
- Not eligible for funding (as determined by ESFA);
- Self-funded or employer-funded.

Learners who are not eligible can apply for support from the College Benefit Fund. Support may be provided dependent on financial need and subject to available funds.

Support for Higher Education Learners is outlined in section 7.9 (HE Support).

7. Bursary Funds

The types of bursary fund and additional eligibility criteria are detailed below.

7.1 ESFA 16-19 Bursary Fund

Additional Eligibility Criteria:

- Aged 16 or over but under 19 at 31st August 2019, or;
- Aged 19 or over and continuing on the same study programme they began aged 16 to 18 (19+ continuer), or;
- Aged 19 or over with an Education, Health and Care Plan (EHCP): **and**
- Meet the residency criteria in [ESFA funding regulations](#) for post 16 provision

Course Eligibility criteria:

- Course must be funded by ESFA or by ESFA via a local authority; or
- Course must be funded or co-financed by the European Social Fund (ESF); or
- Publicly funded and lead to a qualification (up to and including Level 3) accredited by Ofqual or on the ESFA list of qualifications approved for funding 14 – 19: or
- 16 – 19 traineeship programme
- Non – employed learners aged 16 – 19 on a Princes Trust Team Programme

Support Available:

- Discretionary bursaries to meet individual needs e.g. help with the cost of transport, meals, books and equipment

Young adult carers experience a range of difficulties and disadvantages which can potentially affect full-time study. Identified young carers will meet with the College's Safeguarding Officer to determine any financial need and additional awards may be

supported for travel, trips and other course related costs in consultation with the Safeguarding and Welfare Manager and Student Services Manager.

7.2 Capacity and Delivery Fund (CDF) – Industry Placements

This fund is to support vocational students undertaking CDF industry placements who may need to travel further to access their placements and/or incur additional costs for equipment and clothing.

This fund is not restricted to learners who would be entitled to receive bursary support; however the ESFA 16-19 bursary guidance will be followed.

7.3 ESFA 16-19 Bursary for Vulnerable Groups

Additional Eligibility Criteria:

- Aged 16 or over but under 19 at 31 August 2019; and
- In care: or
- Care leavers; or
- 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 a child or partner; and/or:
- Receiving Disability Living Allowance or Personal Independence Payments in their own right as well as Employment and Support Allowance or Universal Credit in their own right

Support Available:

- Up to £1,200 per year (for courses that last for 30 weeks or more. Pro rata amounts payable for courses less than 30 weeks)

In exceptional circumstances and where it is assessed that the learner may need extra help to remain in education, further bursary funding can be allocated from the ESFA 16-19 Bursary Fund. This will be at the discretion of the Safeguarding and Welfare Manager and the Student Services Manager.

The amount of bursary received may be less than the initial award granted as weekly payments are based on good attendance, punctuality, behaviour and progress.

Learners will meet with the College's Safeguarding and Welfare team to determine how the bursary will be distributed (e.g. via equipment awards, travel passes, weekly awards). Details of the award will be recorded at the meeting.

Please note applications for this bursary are assessed on an individual basis and there is a possibility of no award or a limited award if financial needs are covered from other sources.

7.4 ESFA 16 – 19 Free Meals

Additional Eligibility Criteria:

- Aged 16 or over but under 19 at 31st August 2019, or;
- Aged 19 or over and continuing on the same study programme they began aged 16 – 18 (19+ continuer), or;

- Aged 19 or over with an Education, Health and Care Plan (EHCP): **and**
- Meet the residency criteria in [ESFA funding regulation guidance](#)
- In receipt of Free Meals on or after 1st April 2019 (including prior to starting College)
- Student or parents being in receipt of, one or more of the following benefits:
 - Income Support
 - income-based Jobseekers Allowance
 - income-related Employment and Support Allowance (ESA)
 - support under part VI of the Immigration and Asylum Act 1999
 - the guarantee element of State 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, as assessed by Her Majesty's Revenue and Customs (HMRC))
 - Working Tax Credit run-on – paid for 4 weeks after someone stops qualifying for Working Tax Credit
 - Universal Credit with net earnings not exceeding the equivalent of £7,400 per annum

Please note Working Tax Credit is not a qualifying benefit for Free Meals

Support Available:

- Free meal to the value of £2.50 for each day the learner attends study or activity that is part of their course. Meals will be supplied through the College catering outlets.
- Arrangements to ensure eligible learners receive a free meal when studying or participating in activity off site will be put in place as required (e.g. work placements, trips/visits, extra-curricular activities).
- Free breakfast (as determined by the College) every day before 9am and free fruit throughout the day.

The College may award free college meals on a discretionary basis if there is a financial need.

7.5 Care to Learn Scheme (Childcare)

Additional Eligibility Criteria:

- Learners aged under 20 on the first day of the course can apply for support with childcare costs through the Care to Learn scheme. Details of the scheme and how to apply are available at <https://www.gov.uk/care-to-learn>

7.6 Apprenticeship Bursary for Care Leavers

Apprentices are eligible to receive a one off payment of £1000 bursary payment if they have been in the care of the local authority (in care) defined as:

- An eligible child – a young person who is 16 or 17 and who has been looked after by the local authority/health and social care trust for at least a period of 13 weeks since the age of 14, and who is still looked after
- A relevant child – a young person who is 16 or 17 who has left care after their 16th birthday and before leaving care was an eligible child

- A former relevant child – a young person who is aged between 19 and 21 (up to their 25th birthday if they are in education or training) who, before turning 18, was either an eligible or relevant child.

Evidence of the above must be provided and retained to support an application; this must be a signed email or letter confirmation from a local authority appointed Personal Advisor confirming that the apprentice is a care leaver.

If the apprentice is found to have accepted payment incorrectly or when not eligible then the bursary will have to be repaid to Government. The apprentice must sign to confirm they have received the bursary payment.

7.7 ESFA Adult Education Budget Learner Support Fund

Additional Eligibility Criteria:

Hardship funding

- Aged 19 or over on the first day of the course

Support Available:

- Course - related costs, including trips, books and equipment, domestic emergencies and emergency accommodation
- Transport costs
- Exam fees
- Accreditation fees, professional membership fees and any fees or charges due to external bodies
- Registration fees
- In exceptional circumstances, assistance may be provided to assist with course fees for learners who need financial support to start or stay in learning

20 + Childcare Funding

- Aged 20 or over on the first day of the course (Learners aged 20 years old or under should apply for Care 2 Learn – see above)
- the parent/guardian/main carer of a child/children that are of compulsory school age or under
- Learner minimum attendance of 85%

Support Available:

- Payments will only be made to Ofsted registered childcare provider after any free Government entitlement to childcare has been exhausted.
- The maximum award given for the first child is £160 per week and up to £210 per week for more than one child. This is up to a maximum of 36 term weeks. Where applicable, support towards a retainer fee for College holidays (excluding summer holidays) will be payable up to 50% of the maximum award as stated above.
- Support will only be payable for timetabled sessions only.

The amount of funding available for childcare is limited and there is no guaranteed entitlement to the funds. In exceptional circumstances and where funds allow, the maximum award may be increased.

Please note: it is a learner's responsibility to tell the Department for Work and Pensions (DWP) about any learner support contributions being made by the College, as learner support payments may affect eligibility to state benefits.

7.8 Advanced Learner Loans Bursary

Individual Eligibility Criteria:

- Aged 19 or over on the first day of the course and;
- In receipt of Advanced Learner Loan approved by the Learner Loan Company

Support Available:

Hardship

- Course-related costs, including course trips, books and equipment (where these costs are not included in the tuition fee), support with domestic emergencies and emergency accommodation
- Transport costs
- Professional membership fees and any fees or charges due to external bodies (e.g. UCAS fees)
- Support provided by others, or by providing items or services or cash direct to the learner, this can be in the form of a grant or repayable loan provided by you

Assessment of the level of support needed for each programme of study will be carried out in conjunction with information supplied by curriculum teams regarding course related costs.

Bursary funds may be able to assist with costs where equipment is required to enhance a learner's access to learning or to increase levels of achievement.

Childcare Eligibility

To be eligible for support with childcare costs you must be:

- The parent/guardian/main carer of a child/children that are of compulsory school age or under.
- Aged 20 or over at the start date of the course. (Students aged 20 years old or under should apply for Care 2 Learn – see above)
- Learner minimum attendance of 85%

Childcare Support:

- Payments will only be made to Ofsted registered childcare provider after any free Government entitlement to childcare has been exhausted.
- The maximum award given for the first child is £160 per week and up to £210 per week for more than one child. This is up a maximum of 36 term weeks. Where applicable, support towards a retainer fee for College holidays (excluding summer holidays) will be payable up to 50% of the maximum award as stated above.
- Support will only be payable for timetabled sessions only.

The amount of funding available for childcare is limited and there is no guaranteed entitlement to the funds. In exceptional circumstances and where funds allow, the maximum award may be increased.

Please note, it is a learner's responsibility to tell the Department for Work and Pensions (DWP) about any learner support contributions being made by the College, as learner support payments may affect eligibility to state benefits.

For those with additional Learning Support needs who are in receipt of an Advanced Learner Loan, please refer to the Additional Learning Support Policy.

7.9 Higher Education Support

HE Hardship Loan

Individual Eligibility Criteria:

- Be enrolled on a programme of prescribed HE
- Have satisfactory engagement at the time of application
- Have a financial need that can be mitigated by a loan that can reasonably be expected to be repaid over a short period.

Support Available:

Hardship

- Course-related costs, including course trips, books and equipment (where these costs are not included in the tuition fee), support with domestic emergencies and emergency accommodation
- Transport costs
- Professional membership fees and any fees or charges due to external bodies
- Support provided by others, providing items or services, or cash direct to the learner.

The cost of the support provided to learner will be in the form of a repayable loan.

HE Hardship Grant

Individual Eligibility Criteria:

- Be enrolled on a programme of prescribed HE
- Have satisfactory engagement at the time of application
- Have a financial need that cannot be mitigated by a loan that can reasonably be expected to be repaid over a short period.

Support Available:

Hardship

- Course-related costs, including course trips, books and equipment (where these costs are not included in the tuition fee), support with domestic emergencies and emergency accommodation
- Transport costs
- Professional membership fees and any fees or charges due to external bodies

- Support provided by others, or by providing items or services or cash direct to the learner

The support to the student will be in the form of a non-repayable grant.

7.10 College Benefit Fund

The College also has a fund for students in financial need that may not meet the eligibility criteria set out for the funds outlined in sections 7.1-7.8. The College will assess need on an individual basis and will apply discretion as appropriate and where funds allow.

7.11 Emergency Support

Under certain circumstances learners may face genuine emergencies (e.g. no accommodation, unforeseen costs or charges, theft or loss of possessions or money). In these circumstances learners should contact the Safeguarding and Welfare team or Student Services either directly or via their tutor.

Following consultation with tutor, Learner and Student Services Managers every effort will be made to provide the financial assistance to ensure the learner can continue with their studies. Under these circumstances it may not be necessary to provide evidence of family income and costs.

8. Course Fees and Course Related Costs

8.1 Course Fees

Learners aged 16-18 are not charged fees related to tuition, registration or initial exams. Learners will be charged for the cost of A Level examination re-sits or may be charged in other areas e.g. GCSE retakes to improve existing exam results. 16-18 year old learners can apply for support with these costs. Each application will be considered on its own merit within the College criteria and available funds.

Co-funded learners will only be supported with course fee costs where alternative means of financial support are not available and financial need can be evidenced. Learners who are eligible for an Advanced Learner Loan are unable to apply for financial support with course fees.

8.2 Kit, Equipment and Uniform

Course related kit, equipment and uniform information will be provided in the learner welcome pack and at enrolment. Bursary eligible learners can receive free kit, equipment and uniform (subject to bursary assessment and available funds). In addition, in accordance with ESFA funding rules Learners aged 19 years and above who are fully funded are entitled to free materials and uniform where their learning aim cannot be achieved without them.

Kit, equipment and uniform will be purchased and issued by the College. Where the learner has already purchased kit, equipment or uniform then payment will be made into the learner's bank account by BACS, once evidence of purchase has been received by Student Services.

All items purchased using Bursary funds remain College property and will be retained by the College.

8.3 Disclosure and Barring Service Check (DBS)

The cost of a DBS check will be covered within the course costs where it is an essential part of the study programme, except for co-funded learners who will be required to pay but may be eligible to apply for financial support.

Where a DBS is not an essential part of the study programme and a learner chooses a work/industry placement where a DBS is required, then the learner can apply for financial support towards the DBS cost. The placement must be for longer than 10 hours.

8.4 UCAS Fees

Bursary eligible learners can receive support for their UCAS fees. Payment will be made directly to UCAS.

9. Travel Costs

9.1 Travel to College

The College operates a number of services through Transdev and its own College mini buses.

Free bus passes are available to bursary eligible 16-18 year old learners and those aged 19-24 with an EHCP.

Subsidised termly bus passes are available for 16 – 18 year old learners and bursary eligible 19+ learners.

Learners who are resident outside of the travel pass area can apply for a travel grant. Support will be determined on individual circumstances with a maximum payment of up to £135 per month. Travel grants will be paid into the learner's bank account by BACS.

If there are excessive demands on travel costs, priority will be given to learners who live more than 2 miles from the College campus site that they are enrolled. Distance will be calculated using the shortest safe walking distance as identified on Google maps.

Learners will be issued with one travel pass for the duration of their studies at the College and are required to retain the pass (including where courses/studies span more than one academic year). A £10 fee will be charged for replacement bus passes. Please note the travel pass remains the property of the College and where a pass is no longer required a learner is required to return this to Student Services.

For Nelson and Colne College campus only: Learners issued with a car park pass will not be entitled to a subsidised bus pass or other financial travel support.

Learners with an EHCP can apply to the Local Authority for support with travel, if it is detailed within the plan. If there are any unforeseen issues with Local Authority assessments, learners can apply for temporary financial support from the College.

Any exceptional circumstances and Special Educational Needs that do not meet the Local Authority Transport Policy will be considered during assessment and through the appeals procedure where necessary. Please note that any appeals against a decision made by the Local Authority must be made to that local authority and not the College.

9.2 Trips and Visits

Financial support towards the cost of mandatory course trips can be provided for bursary eligible learners. The maximum contribution to any single trip/visit will not exceed £150.

Where financial support is provided, payment will be made through internal College transfers only.

10. **Application and Eligibility Assessment**

Application for financial assistance from College Bursary Funds must be made via the online application portal which can be accessed from the College websites or by completing a paper Bursary Application Form which is available from the Student Services team. All new full-time applicants will be sent details in their joining instructions.

Applications will only be processed from enrolled learners as defined by the College. Learners must make their application as soon as possible as funds are limited and will be paid on a 'first come, first served' basis.

All funds are means-tested and applicants will be required to provide evidence that their household income is £30,000 (excluding Care to Learn). However exceptional circumstances will be taken into consideration.

All income and benefits (including housing benefit, council tax benefit, child tax credit, universal credit etc.) are taken into account. The College does not take into account Child Benefit, Disability Living Allowance or Personal Independence Payment when calculating total household income.

For parents/guardians or learners who are self - employed, the College will assess income based on Gross Profit, but taking into account any business expenditure. For example household items, mortgage and food would not be deducted from Gross Profit but stationary and machinery servicing would be deducted.

An assessment is made based on a completed application detailing income from employment and/or benefits along with supporting evidence of all declared income. It may be necessary for learners to discuss their circumstances with a member of Student Services team or Safeguarding and Welfare team.

The number of dependent children/adults living at the same household as the applicant is taken into consideration as the College recognizes additional household living costs. The College will allow a further £1,716 per dependent child/adult (in addition to the £30,000 threshold).

In order for funding to be awarded, the College expects learners to adhere to the College standards for behaviour and attendance to be met. The College may withhold or retrieve money paid from a bursary fund where a learner:

- Is involved in disciplinary proceedings;
- Has been absent for a period of 4 continuous weeks or more (excluding holidays);
- Has decided to withdraw from their study programme.

Please refer to **Appendix 1** for the bursary support available including maximum awards. Please note each application is assessed individually and awards are based on financial need, available funds and the ESFA funding rules and College policy.

11. Record Keeping, Complaints and Appeals

Bursary Application Forms and all relevant assessment and payment documentation will be retained for 6 year. Refer to the privacy notices on the College websites for further information or speak to a member of the Student Services team.

Should you have any reason not to be satisfied with how the College has handled your bursary application the College's Complaints Policy and Procedure should be followed.

The Complaints Policy and Procedure and Complaints Form can be found on the College's websites (www.nelson.ac.uk; www.lal.ac.uk or www.accross.ac.uk). Alternatively you can contact the Student Services team studentservices@nelson.ac.uk or studentservices@accross.ac.uk. These procedures must be exhausted before a learner/parent/guardian contacts the ESFA.

12. Dissemination

Nelson and Colne College Extranet
Accrington and Rossendale College Intranet
Nelson and Colne College, Lancashire Adult Learning and Accrington and Rossendale College Websites

13. Monitoring and Review

The policy and operation of the procedure will be monitored and reviewed by Nelson and Colne College's Assistant Principal – Performance and Planning.

14. Related policies/procedures

Documents related to this policy are:

- Fees Policy 2019/20
- Complaints Policy and Procedure
- Additional Learning Support Policy

15. Management Responsibility

The Assistant Principal – Performance and Planning has overall management responsibility for this policy within Nelson and Colne College.

Daily implementation of this policy is the responsibility of the Student Services Manager and Safeguarding and Welfare Manager.

Appendix 1

Support is subject to eligibility criteria, assessment and available funds.

All learners are entitled to Free Fruit and a Free Healthy Breakfast.

Bursary Fund	What Learners can get (subject to available funds)	Eligibility requirements (See policy for further detailed eligibility information)
ESFA 16 – 19 Bursary Fund	<ul style="list-style-type: none"> • Free Travel Pass including evenings and weekends; or • Travel bursary of up to £95 per month • Free Kit/Equipment/Uniform/Books • Free UCAS Fees • Mandatory trip costs covered up to a maximum of £150 • Support with industry placements • Hardship support 	Household income less than £30,000 per year as evidenced by proof of parent/guardian income or eligible benefit evidence.
ESFA 16 – 19 Vulnerable Bursary Fund	Up to £1200 of support that can be used for travel and/or kit/equipment/uniform. Bursary paid every month.	Defined Vulnerable groups only.
ESFA 16 – 19 Free Meals	<ul style="list-style-type: none"> • A free daily lunch up to the value of £2.50 per day 	Specific benefit evidence as set out by the Government to show unemployment or low household income
Care to Learn Scheme (Childcare)	<ul style="list-style-type: none"> • Help with childcare costs up to a maximum of £160 per week. 	Under 20 years old at course start date.
Apprenticeship Bursary for Care Leavers	<ul style="list-style-type: none"> • £1000 one off payment 	Been in the care of a local authority.
ESFA Adult Education Budget (AEB) Learner Support Fund	<ul style="list-style-type: none"> • Help with childcare costs up to a maximum of: <i>£160 per week (36 weeks term time)</i> <i>£80 non term time (excluding summer holidays)</i> • Free Kit/Equipment/Uniform/Books • Hardship support 	<p>Aged 19 + on first day of course.</p> <p>Household income of less than £30,000 per year.</p> <p>Enrolled on an AEB funded course.</p>
Advanced Learner Loans Bursary	<ul style="list-style-type: none"> • Help with childcare costs up to a maximum of: <i>£160 per week (36 weeks term time)</i> <i>£80 non term time (excluding summer holidays)</i> • Free Kit/Equipment/Uniform/Books • Hardship support 	<p>Aged 19 + on first day of course.</p> <p>Household income of less than £30,000 per year.</p> <p>In receipt of an Advanced Learner Loan.</p>
College Bursary Fund	<ul style="list-style-type: none"> • Subsidised travel pass for £50 / £60 includes evening and weekend travel • Subsidised - Kit/Equipment/Uniform/Books, up to a maximum cost of £150 • Hardship support 	<p>Aged 16-18 or 19+ continuing learner.</p> <p>Individual circumstances considered.</p>

The College will allow a further £1,716 per dependent child/adult (in addition to the £30,000 household income threshold).