

## **POLICY / PROCEDURE**

<b>Document Title</b>	<b>Financial Support for Learners' Policy and Procedure</b>
<b>Version</b>	<b>Version 1.2</b>
<b>Approved by</b>	<b>Senior Management Team</b>
<b>Date approved</b>	<b>July 2016</b>
<b>Effective date</b>	<b>1<sup>st</sup> August 2016</b>
<b>Date of next review</b>	<b>July 2017</b>
<b>Lead responsibility</b>	<b>Executive Director of Finance &amp; Resources</b>

### **1. Purpose**

- 1.1. A key priority of the Government is to eliminate the gap in attainment between those from poorer and more affluent backgrounds, providing young people and adults with opportunities to develop their skills and to secure employment.
- 1.2. The College receives Discretionary Learner Support Funds (DLSF) from the Skills Funding Agency (SFA) and Bursary Funds from the Education Funding Agency (EFA). This funding is provided to support learners aged 16 and above who are experiencing financial difficulty when meeting the costs associated with learning.
- 1.3. The purpose of this policy and procedure is to outline the College's approach to providing financial support to learners through the discretionary element of the funding.

## **2. Scope**

- 2.1. The College has identified the following priority groups relating to the distribution of financial support under the discretionary element of the funding:
  - 2.1.1. Young people in care, care leavers, young people in receipt of Income Support or Universal Credit and disabled young people in receipt of Employment Support Allowance and Disability Living Allowance, or Personal Independence Payments will be eligible to receive a guaranteed bursary of £1,200 a year.
  - 2.1.2. Derwentside College will make awards to young people in ways that best fit the needs and circumstances of our students. Bursary awards will be targeted towards young people facing financial barriers to participation, such as the costs of transport, meals, books and equipment.
  - 2.1.3. Learners who are economically and socially disadvantaged are the priority group for Advanced Learner Loans Bursary and DLS at Derwentside College. This includes those who need support for essential equipment, transport, childcare (for learners aged 20 and over) or associated learning costs and those who are facing financial difficulty, and 19+ learners in receipt of an Advanced Learner Loan requiring learning support.
- 2.2. Specific eligibility criteria for each individual fund are identified within the procedure section of this document.

## **3. Policy / Principles**

- 3.1. The College will comply with Funding Body guidance and requirements when considering applications and allocations of all DLSF funding.
- 3.2. Derwentside College will:
  - 3.2.1. Consider the availability of other strands of financial support for learners (including support funding through DWP and Jobcentre Plus) ahead of consideration for the College bursary or discretionary fund and ensure that learners exercise their entitlement to other forms of financial support before they pursue an application for College bursary or DLS.
  - 3.2.2. Develop clear criteria showing how Derwentside College will administer and distribute the funds. This information will be available to learners via the web-site and Moodle.
  - 3.2.3. Assess the learner's financial hardship by carrying out an income assessment.
  - 3.2.4. Identify the learner-specific financial need which may prevent the learner from participating in FE before making any financial award.
  - 3.2.5. Pay 16-18 Bursary or DLS financial awards in the form of goods or services or one-off or regular payments which are for costs other than living (except in exceptional or emergency situations).

These will not affect the level of the learner benefit entitlement. Derwentside College will make it clear at the time the payment is made to the learner, for what purpose the payment is given and whether it is one of a series, for services and goods or a lump sum payment.

#### **4. Procedure**

##### **4.1. Categories of Funding Available**

###### **4.1.1. Course fees**

- DLS funding can be used to fund tuition fees for learners up to a maximum of 50% of Course Fee, or £350, whichever is the greater.

###### **4.1.2. Travel**

- All 16-18 learners are offered free travel to College regardless of personal circumstances.
- 19+ learners are able to claim travel costs, subject to eligibility criteria being met. These learners will receive a reimbursement of evidenced travel costs, or a mileage allowance as appropriate.
- For 16-18 eligible learners, the College will provide an appropriate bus pass, allowing the learner to travel to and from College during term time periods.
- Learners using their own transport will receive a mileage allowance based on evidenced claims.

###### **4.1.3. Hardship**

- 16-18 learners classed as vulnerable are entitled to an enhanced bursary of £1,200 per annum.
- 16-18 and 19+ learners are able to claim a termly bursary award, subject to eligibility criteria being met.

###### **4.1.4. Meal support**

- 16-18 and 19+ learners are able to claim meal allowance of £3.50 per day, subject to eligibility criteria being met.

###### **4.1.5. Uniforms / Equipment**

- All 16-18 learners are provided with uniforms and equipment by the College where necessary.
- Learners in receipt of a learning loan are provided with uniforms and equipment as part of the course fee.
- For eligible learners aged 19+, funding may be used to fund essential uniforms and/or equipment.

###### **4.1.6. Childcare**

- 20+ learners can have the costs of childcare met for pre-school aged children that are placed with Ofsted registered child minders or nurseries. This is subject to the eligibility criteria being met.
- Funding of up to £160 per week is available although this may be increased under exceptional circumstances.
- Funding provided to cover childcare costs will only cover timetabled activity, plus reasonable travel time to and from College.
- Learners will be expected to deduct free childcare made available by the Government from any potential claim.

#### 4.2. General Eligibility Criteria

- 4.2.1. The residency eligibility criteria for all funding streams are aligned to the residency criteria addressed in the document *Funding Regulations*, part of the overall Education Funding Agency (EFA)/SFA *Funding Guidance 2016-17*. Residency criteria are broadly determined by the following statement:
- A person on the “relevant date” who is settled in the UK, and who has been ordinarily resident in the UK and Islands (that is including the Channel Islands and the Isle of Man) for the three years preceding the “relevant date” and whose main purpose for such residence was not to receive full-time education during any part of the three-year period. “Settled” meaning - having either indefinite leave to enter or remain (ILE/R) or having the right of abode in the UK”
- 4.2.2. Asylum seekers aged 16-18 are eligible to apply for support from the 16 – 18 Bursary fund. However, those aged 19 and over are not eligible to apply for DLS funding
- 4.2.3. Learners must always be enrolled onto an EFA/SFA-funded FE learner-responsive programme of study before any DLS award will be considered.
- 4.2.4. Derwentside College will consider the availability of other sources of funding to which the learner might be entitled within the assessment process.
- 4.2.5. Learners must be aged 20 or over to receive support funding for childcare.

#### 4.3. 16-18 Bursary - Learner Eligibility Criteria

- 4.3.1. In order to gain access to the funds identified within section 4.1, learners must be aged between 16 and 18 on the 31<sup>st</sup> August 2016 and meet at least one of the criteria identified below:
- Household income below £26k.
  - Learner, parent, or guardian in receipt of an income based benefit (e.g housing benefit, JSA, universal credit, working tax credit).
  - Travel is the only exception to the above criteria and is made available to all 16-18 year old learners.

#### 4.4. Discretionary Learner Support - Learner Eligibility Criteria

- 4.4.1. In order to gain access to the funds identified within section 4.1, learners must be aged 19+ on the 31<sup>st</sup> August 2016 and be studying up to Level 2, or for those aged 19 to 23, studying for their first Level 3. In addition, learners must be able to meet at least one of the criteria identified below:
- Household income below £26k.
  - Learner in receipt of an income based benefit (e.g housing benefit, JSA, universal credit, working tax credit).

#### 4.5. Advanced Learner Loans - Learner Eligibility Criteria

- 4.5.1. In order to gain access to the funds identified within section 4.1, learners must be in receipt of an Advanced Learner Loan and be able to meet at least one of the criteria identified below:
- Household income below £26k.
  - Learner in receipt of an income based benefit (e.g housing benefit, JSA, universal credit, working tax credit).

#### 4.6. Assessment Criteria

4.6.1. All learners will be required to provide parent / carers / own income evidence in the form of benefit documents as detailed in the following table:

<b>Income / Benefit</b>	<b>Evidence Required</b>
Annual salary	P60, or week 52 (last week in March 2016) payslip or month 12 (March 2016) payslip.
Income support	Entitlement / Award letter – dated within the last three months, or the current tax year.
Job Seekers Allowance (Income based)	
Employment Support Allowance (Income related)	
Universal Credit	
Council Tax Benefit	
Housing Benefit	
Any other benefit	
Working Tax Credit	Working Tax Credit Award Notice. Must be for full year and not partial awards (FULL AWARD NOTICE).
Child Tax Credit	Child Tax Credit Award Notice. Must be for full year and not partial awards (FULL AWARD NOTICE).
Grants of bursaries	Relevant paperwork detailing entitlement and amount paid.

4.6.2. Learners aged 19 and over living with parent(s)/carer(s), may be assessed independently.

4.6.3. Any learners who may be eligible for funding from an external source will be required to access the external fund before any DLS will be considered. Funding which is provided by an external source will be taken into consideration when making any financial award.

4.6.4. All awards are made subject to the availability of funds allocated in September by the Government. Awards will be made on a first come first served basis, and there is no guarantee that late applications will be funded.

4.6.5. Where students are found to have intentionally given misleading or inaccurate information the College will claim back the award made. Providing false statements may result in the student being sanctioned in accordance with the College Disciplinary Policy and/or prosecution.

#### 5. Relevant Legislation / Regulation

5.1. The following legislation and regulations apply to this policy / procedure:

- Skills Funding Agency – Funding Rules 2016-17
- Education Funding Agency – Funding Guidance 2016-17

#### 6. Related Documents

6.1. There are no related documents relevant to this policy and procedure.

## **7. Accountability**

- 7.1. The Director of Finance and Resources is responsible for the drafting and implementation of this policy.
- 7.2. The Director of Finance is responsible for ensuring that this document is regularly reviewed and updated – and is the first contact point for managers seeking advice and guidance about the Policy and Procedure, or making enquiries about its interpretation.
- 7.3. All managers are responsible for ensuring that they and their team members follow the requirements set out in this document.
- 7.4. All employees are responsible for adhering to the requirements set out in this document.

## **8. Equality & Diversity**

- 8.1. The College has paid due regard to equality considerations during the preparation and implementation of this Policy and Procedure.
- 8.2. These considerations included the potential for any differential negative effect on the grounds of age, disability, gender reassignment, pregnancy and maternity, race (including ethnic or national origins, colour or nationality), religion or belief (including lack of belief), sex, sexual orientation, marriage or civil partnership.
- 8.3. The College's judgement is that there is no such negative effect on those grounds and, consequently, no potential breach of the Equality Act 2010.
- 8.4. The operation of this Policy and Procedure will be monitored by the Personnel Manager in order to establish that no unlawful discrimination is taking place and to identify opportunities for the College to enhance equality of opportunity and fair treatment.

## **9. Review**

- 9.1. This document will be reviewed and updated in July 2017.
- 9.2. The Director of Finance and Resources will undertake this review, taking into account the outcomes of the monitoring process, legislative changes and developments in good practice.
- 9.3. As part of the review, the Director of Finance will seek and consider the views of the College's employees and students, where relevant.
- 9.4. The outcome of the review will be reported to the Senior Management Team.

10. Document Identification

<b>Category</b> [select ONE only]	<input type="checkbox"/> Programmes/courses <input type="checkbox"/> Partnerships <input checked="" type="checkbox"/> Finance <input type="checkbox"/> Quality <input type="checkbox"/> Governance <input type="checkbox"/> Health and safety <input type="checkbox"/> Facilities <input type="checkbox"/> Computer Services <input type="checkbox"/> MIS <input type="checkbox"/> Admissions <input type="checkbox"/> Teaching and learning <input type="checkbox"/> Personnel
<b>Audience</b> [select ALL that apply]	<input checked="" type="checkbox"/> Employees <input checked="" type="checkbox"/> Learners <input type="checkbox"/> Partners <input type="checkbox"/> Suppliers