

POLICY

Document Title	Financial Support for Learners' Policy
Version	Version 1.9
Equality Impact Assessment Status	Completed 7 August 2024
Consulted with	Executive Team
Signature of Principal / Chief Executive Officer	
Signature of Lead Executive Team Member	
Approved by	Corporation Board
Date approved	15 October 2024
Effective date	16 October 2024
Date of next review	31 July 2026
Lead responsibility	Vice Principal Finance & Resources

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 (DLS) Funds and Bursary Funds from the Education Skills Funding Agency (ESFA). This funding is provided to support learners aged 16+ who are experiencing financial difficulty when meeting the costs associated with learning.
- 1.3. The purpose of this policy 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 aged 16-18 who are in care, care leavers, in receipt of Income Support or Universal Credit and disabled young people in receipt of Employment Support Allowance or Universal Credit **as well as** Disability Living Allowance or Personal Independence Payments in their own right. Where a financial need has been identified, these learners will be eligible to receive a vulnerable learner bursary of up to £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 learners. Bursary awards will be targeted towards young people facing financial barriers to participation, such as the cost 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 funding. This includes those who need support for essential equipment, transport, childcare (for learners aged 20+) and hardship funding for those in emergency or exceptional circumstances. As well as learning support for those in receipt of an Advanced Learner Loan.
- 2.2. The specific eligibility criteria for each individual fund are identified within section 4 of this document.

3. Policy / Principles

- 3.1. The College will comply with Funding Body guidance and requirements when considering applications and allocations of support funding.
- 3.2. Derwentside College will:
 - 3.2.1. Consider the availability of other strands of financial support for learners (including 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 College website and Intranet sites.
 - 3.2.3. Assess the learner's financial needs by carrying out an income assessment.
 - 3.2.4. Identify the specific financial needs which may prevent the learner from participating in FE before making any financial award.

- 3.2.5. Pay 16-19 Bursary or DLS 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). Generally, these will not impact upon the learner's 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

- In exceptional circumstances DLS funding can be used to fund tuition fees for learners.

4.1.2. Travel

- **All** full-time 16-18 learners are eligible free travel to College regardless of personal circumstances. The College will provide a bus pass, allowing the learner to travel to and from College during term time periods.
- 19+ learners who meet the eligibility criteria (see section 4.4) can claim travelling expenses. These learners will receive a reimbursement of evidenced public transport costs, or for learners using their own transport, a mileage allowance.

4.1.3. Hardship

- 16-18 learners who have a financial need and meet the ESFA criteria are eligible for an enhanced vulnerable bursary of up to £1,200 per annum.
- 16-18 and 19+ learners who meet the eligibility criteria can claim a termly bursary award.
- Emergency hardship funding is available to support learners in emergency situations.

4.1.4. Meal support

- 16-18 and 19+ learners who meet the eligibility criteria can claim a daily meal allowance.

4.1.5. Uniforms / Equipment

- **All** 16-18 learners receive free essential uniform and equipment.
- For eligible learners aged 19+, funding may be used to purchase essential uniforms and equipment.
- For learners in receipt of an Advanced Learner Loan, the charge for essential uniform and equipment must be included in the cost of their loan.

4.1.6. Childcare

- Eligible learners aged 20+ can have the cost of childcare met for pre-school aged children that are placed with Ofsted registered child minders or nurseries.
- Funding for childcare costs will cover timetabled hours, plus reasonable travel time to and from College.
- Learners will be expected to utilise free Government childcare provision from any claim. Only hours in excess of the government provision can be supported.

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 Skills Funding Agency (ESFA) *Funding Guidance*. 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 are eligible to apply for support if they meet the criteria as set out in the 16-19 Bursary Fund Guide or the Adult Skills Funding Rules.
- 4.2.3. Learners must always be enrolled onto an ESFA 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 for childcare with the exception of those in receipt of Care to Learn funding whose costs exceed the weekly rates for that scheme.

4.3. 16-18 Bursary - Learner Eligibility Criteria

- 4.3.1. To access the funds identified within section 4.1, learners must be aged between 16 and 18 on the 31st August for the relevant college year, with the exception of 19+ learners who are continuing a study programme they began aged 16-18, or who have an education, health and care plan (EHC)) and meet at least one of the criteria identified below:
- Household income below £30k.
 - Learner, parent, or guardian in receipt of an income-based benefit (e.g., Housing Benefit, Job Seekers Allowance, Universal Credit).
 - Travel is the only exception to the above criteria and is made available to all 16–18-year-old full-time learners.

4.4. Discretionary Learner Support - Learner Eligibility Criteria

- 4.4.1. To access the funds identified within section 4.1, learners must be aged 19+ on the 31st August for the relevant college year and be studying up to Level 2, aged 19 to 23, studying for their first Level 3 or 19+ and studying a course which is included in the government’s Level 3 free courses for jobs offer. In addition, learners must meet at least one of the criteria identified below:
- Household income below £30k.
 - Learner in receipt of an income-based benefit (e.g., Housing Benefit, Job Seekers Allowance, Universal Credit).

4.5. Advanced Learner Loans - Learner Eligibility Criteria

- 4.5.1. To access the funds identified within section 4.1, learners must be in receipt of an Advanced Learner Loan and meet at least one of the criteria identified below:
- Household income below £30k.
 - Learner in receipt of an income-based benefit (e.g., Housing Benefit, Job Seekers Allowance, Universal Credit).

4.6. Assessment Criteria

- 4.6.1. All learners will be required to provide evidence of household income or benefit in the form of official documents as detailed in the following table:

Income / Benefit	Evidence Required
Annual salary	P60, week 52 or month 12 payslip for the relevant College year for each earner in the household.
Universal Credit (UC)	Evidence of on-line UC account and payments. Entitlement / Award letter – dated within the last three months, or the current tax year.
Job Seekers Allowance (Income based)	
Employment Support Allowance (Income related)	
Income Support	
Council Tax Benefit	
Housing Benefit	
Any other benefit	
Working Tax Credit	Working Tax Credit Award Notice.
Child Tax Credit	Child Tax Credit Award Notice.
Grants or bursaries	Relevant paperwork detailing entitlement and amount paid.

- 4.6.2. Learners aged 19+ living with parent(s)/carer(s), may be assessed independently.
- 4.6.3. Learners who may be eligible for funding from an external source will be required to access this support 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. Awards are made subject to the availability of funds which are allocated in each academic year by the Government. Awards are 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 any 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 current ESFA legislation and regulations apply to this policy:

- 16-19 Bursary Fund Guide
- Free meals in further education funded institutions guide
- Care to Learn Guide
- Adult Skills Fund: funding rules
- Advanced Learner Loans funding rules

6. Related Documents

- 6.1 The following related documents are relevant to this policy:

- Financial Support for Learners Policy

7. Accountability

- 7.1. The Vice Principal Finance and Resources is responsible for the drafting and implementation of this policy.
- 7.2. The Vice Principal Finance and Resources is responsible for ensuring that this document is regularly reviewed and updated and is the first point of contact for managers seeking advice and guidance about the Policy 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.
- 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 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 2026.
- 9.2. The Vice Principal Finance and Resources will undertake this review, considering the outcomes of the monitoring process, legislative changes and developments in good practice.
- 9.3. As part of the review, the Vice Principal Finance and Resources 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

<p>Category [select ONE only]</p>	<ul style="list-style-type: none"> <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
<p>Audience [select ALL that apply]</p>	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Employees <input checked="" type="checkbox"/> Learners <input type="checkbox"/> Partners <input type="checkbox"/> Suppliers

EQUALITY IMPACT ASSESSMENT

This form must be completed when drafting a new policy/procedure or amending an existing policy/procedure. It should be completed at the earliest opportunity so any issues can be resolved/mitigated in advance.

POLICY / PROCEDURE DETAILS	
Name of policy / procedure:	Financial Support for Learners' Policy
Version:	Amended
Date of latest version:	7 August 2024
Manager responsible:	Tina Hannant
Others involved in this EIA:	

ASSESSMENT			
What evidence have you used? (This could be internal data, surveys, complaints/grievances or other external quantitative or qualitative research)	Learner Support Funds eligibility has been widened to allow more low-income households to access support and the changes to the policy have been made to keep broadly in line with increasing costs and wages.		
Who have you engaged / consulted with? (This could be individuals, groups, networks or organisations)	Wellbeing team, learner support fund administrator.		
For each protected characteristic, does the evidence show that the policy/procedure...	does not inadvertently disadvantage or discriminate against staff, learners or service users?	actively explores opportunity and fosters good relations between people of different protected groups and backgrounds?	Where 'no' is checked, or concerns have been identified detail them here:
Age (including older and younger people)	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	
Disability (including those with physical disabilities, unseen disabilities and mental health issues)	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	
Sex (both men and women)	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	
Gender reassignment or Gender identity (including trans staff and students who have transitioned, are considering transitioning or are in the process of transitioning from one gender to another, and also non-binary staff)	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	

and students who do not identify with, or reject gender labels)			
Marriage and Civil Partnership	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	
Pregnancy / Maternity (including breastfeeding mothers)	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	
Race and Ethnicity (including nationality, colour, native language, culture and geographic origin)	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	
Religion and belief (including those with no religion or belief)	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	
Sexual orientation (including, but not limited to, gay, lesbian, bisexual, queer and straight staff and learners)	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	
Intersectionality (although not a protected characteristic itself it's important to consider how characteristics intersect)	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	

ACTION PLANNING		
Issue Identified	Planned or completed remedial action	Person responsible and timeframe

MONITORING AND REVIEW
How will the impact of your policy and procedure be monitored and reviewed once agreed?
The ability of learners to access learner support funds is reviewed on an annual basis with the College retaining a flexible approach to how support can be delivered to learners.

AUTHORISATION		
	Signature	Date
Manager responsible:	Tina Hannant	7 August 2024
EIA Panel:		
EIA Committee's Comments if applicable:		