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| TITLE: 19+ Financial Support Policy | REF: LS007 | VERSION: 3 |
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| LEAD PERSON: Group Director of Marketing and Customer Experience | | |
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| 1. 23 March 2018 | Group Executive Team | Full Review |
| 2. 16 April 2018 | Activate Learning Corporation | Full Review |
| 3. 17 June 2019 | Activate Learning Corporation | Full Review |

19+ Financial Support Policy 2019-20

In line with government guidance bursary policies will be kept under review to ensure support is continued to be provided to support students who need it.

Policy Statement

The Activate Learning group is committed to encouraging and enabling participation in education so that individuals reap the personal and economic benefits of life enhancing opportunities created by lifelong learning. We recognise that money issues can be a significant barrier to participation, particularly for the most vulnerable people.

Activate Learning aims to use government bursary funds to ensure funding reaches those students who have a specific financial hardship preventing them from taking part/ continuing in learning. Funds are used in the most effective and efficient way possible to ensure that the maximum number of eligible students at any of our college campuses are able to access financial support to remove any barrier to participation.

All decisions about which students receive a discretionary bursary and how much bursary they receive are based on each student's individual circumstances and their actual financial need. The bursary fund is intended to help students overcome the specific financial barriers they face. These will vary from student to student, depending on a range of factors, for example, their household income, their home circumstances, the distance they need to travel to the institution and the requirements of their study programme.

Purpose

This policy document outlines how Activate Learning intends to use its allocation of discretionary bursary funds during the 2019/20 academic year. The bursary schemes for future years will be confirmed once the group's 19+ bursary allocation for the year is announced.

Promotion

Activate Learning colleges actively promote the availability of financial support to new and continuing students throughout the admissions process via the website, prospectuses,

leaflets, keep warm communications, open event advice sessions and the interview process. Text and email message reminders are sent at key times during the year. All materials are written in simple, plain English and are available in alternative formats.

The Group Student Support team identify and support students who are at risk of not participating as a result of their home circumstances leading to their need for additional support, and make referrals directly to the college Bursaries and Hardship fund.

We promote the following bursary schemes to all students aged 19 or over studying at Activate Learning Colleges:

- travel bursary
- childcare bursary
- study start-up costs, trips and work placement bursary
- ESFA 19 – 25 Food Credits (Free College Meals) for students continuing on a programme they began when aged 16-18 or with an EHCP
- hardship fund
- residential bursary

In addition, the colleges promote the Government's Care to Learn childcare scheme for young people who began their programme of study when aged under 20.

Administration

The Activate Learning bursaries are managed according to the guidance laid out in the Education & Skills Agency's document; Adult education budget 2019 to 2020. Records of applications, eligibility evidence and payments are complete, accurate and stored securely for internal and external audit.

Eligibility

To qualify, students must meet the eligibility criteria and the evidence requirements outlined on the Student Finance Application Form and procedure accompanying this policy, see appendix 1. Students whose need has been identified by Student Support are not necessarily required to provide evidence of household income.

Students must have right to study and be enrolled on a funded further education programme or be enrolled to a course with an approved Advanced Learner loan in place.

Students must be aged 19 or older on 31 August 2019. Learners aged 19 or over on 31 August 2019 who are continuing a programme they began aged 16 – 18 (19+ continuers) will be funded through the 16-18 Bursary.

Students must be considered a 'home' student for the purposes of further education funding. 'Home' status is the same for the bursary as it is for fee eligibility purposes. Awards will be made based on the residency information provided on the Bursary Fund Application form 2019-20 and evidence may be requested to support this. Assessments which are made by the Advice and Admissions team at enrolment will be used to confirm 'home' status and we withhold the right to withdraw awards should this status not be confirmed, or withdraw funding if a student's status changes throughout their programme.

Eligibility under a low income criterion assumes that students have applied for all other statutory government financial support, evidence of this will be required.

Student contributions

Students are expected to make a percentage contribution, such as towards their travel pass, please see details in appendix 1.

Conditions

Awards are made proportionate to the student's need and the discretionary bursary is limited, therefore awards are made on a first-come-first-served basis.

A proportion of the bursary is reserved for students joining courses throughout the year. The group reserves the right to close the scheme at any time to review the allocation of funds and it may be reopened at a later date. If applications are made when the fund is closed, they will be processed in order of the date they are received.

All the required documentary eligibility evidence must be provided before an application can be processed, incomplete applications or applications without all the required evidence will not be processed. Evidence will only be accepted if the address matches that of the student applying for the fund.

Any payment is conditional on students maintaining an acceptable level of attendance of 92%. Students whose attendance is below 92% may have a payment partially approved proportionate to their attendance or the payment not authorised.

In addition to this student must adhere to the Student Standards of Behaviour and Code of Conduct. Students' attendance will be monitored and financial support could be withdrawn if their attendance drops below this level or if a student fails to adhere to the Standard of Behaviour. No funding will be withdrawn without consideration of all the relevant factors or without notification. Payments will be stopped if students have been absent for a period of 4 continuous weeks or more.

The conditions of the scheme are made clear to all applicants when they apply and they are asked to sign the application form to confirm that these are understood. If they have provided an email address students receive confirmation of their bursary award by email and a reminder of the terms and conditions with regards to attendance. Otherwise they will be informed by letter.

We will communicate by email unless otherwise requested.

Bursary payments to be made to students are made by BACS. ESFA does not expect bursary payments to be paid into another person's bank account, except in exceptional circumstances where a student is unable to administer their own account.

Student's responsibilities

It is the student's responsibility to notify Activate Learning of any change of circumstances that affect their bursary award. Changes include address, bank details, study programme, childcare provider and withdrawal from their course.

Students are also responsible for planning their journey to college, informing us of the travel company and where they will embark on their chosen transport. They are required to liaise directly with the travel company if they require a replacement pass. If they withdraw from their programme students are required to return their travel pass to Activate Learning.

Any smart travel card issued will have a stop placed on it if the student withdraws from their programme, or if their attendance falls below the acceptable level.

If a student fails to notify Activate Learning of any changes affecting their bursary award or withdraws from their course, we may seek to recover any overpayments of bursary funds. Any ongoing scheduled payments will stop on the last day the student attended their programme.

Students are responsible for providing correct bank details to enable bursary payments to be made. Any bursary payments withheld due to student's correct bank details not being provided will be back dated to a maximum of four weeks.

Students are responsible for informing the Department of Work and Pensions about any financial support payments they receive, as these payments may affect your eligibility to some benefits.

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Appeals

Students will receive confirmation by letter or email that their application has been unsuccessful this includes details on how to appeal this decision.

Once their appeal has been considered and a decision has been communicated, there is no further right of appeal.

Feedback and evaluation

Activate Learning listens to students and works in partnership with them, to create policies and procedures that improve the learning experience and maximise student success. Students' satisfaction with the financial support schemes and how they are administered is carried out through learner voice round tables and feedback surveys.

The group evaluates the impact of financial support by evaluating the retention rate of students in receipt of support from the scheme and by equality measures.

Inclusion and diversity

Activate Learning does not discriminate against any student group, either directly or indirectly. We measure and report on uptake of the scheme by gender, ethnicity, ability, level of programme, curriculum area, mode of study and personal circumstance to be assured that no group is excluded and those students potentially facing the greatest barriers are able to benefit from the available funds. Positive steps are taken to review and address any inequality or imbalance.

Data protection and confidentiality

Students and parents/carers who wish to discuss their family situation in private will be offered a confidential meeting space. Information is only shared on a strictly need-to-know basis.

All personal and/or sensitive information is stored securely on our server and in lockable cabinets with access limited to relevant staff only. All relevant information is held for seven years and then destroyed through a confidential disposal system.

Scope

This policy is relevant for all 16-19-year-old students, students aged 19 to 24 and have an Education, Health and Care (EHCP) and students aged 19 or over and continuing on a study programme they began aged 16 to 18 who are eligible to apply for financial support.

The Advanced Learner Loan Bursary is available for students enrolled on a level 3 – 4 course who are not eligible for fee remission. To be eligible students must have a letter approving their Advanced Learner Loan and meet the eligibility criteria.

Non-employed students aged 16 to 19 who are participating in a Prince's Trust Team Programme are eligible to receive the bursary in the same way as any other student participating in an eligible, publicly funded course.

The policy applies to students at Banbury and Bicester College, Bracknell and Wokingham College, City of Oxford College, Farnham Sixth Form College, Guildford College, Merrist Wood College and Reading College or anyone at our operational sites enrolled onto a further education study programme with Activate Learning.

Definitions

| | |
|----------------|---|
| ESFA | Education and Skills Funding Agency |
| Bursary | This is provided to Colleges to remove financial barriers to participation. |
| Gross | Income before tax and employment deductions |
| ALL | Advanced Learner Loan |
| LDA | Learning Disability Assessment |
| EHCP | Educational Health and Care Plan |
| FE | Further Education |
| HE | Higher Education |
| UASC | Unaccompanied asylum-seeking child |

References

[Draft ESFA funded adult education budget funding rules 2019 to 2020](#)

[Free Meals Guidance 2019-2020](#)

[Care to Learn guide for institutions: 2019 to 2020](#)

[19+ Financial Support Award Procedures 2019-20](#)

Appendix 1

19+ Financial Support Award Procedures 2019-20 Background

Bursary funds are allocated to students at Activate Learning colleges in line with the Education and Skills Funding Agency Guidelines. We promote the following bursary schemes to all students studying at Activate Learning colleges:

- Travel Bursary
- Study start-up costs, trips and work placement bursary
- Childcare Bursary
- Residential Bursary
- ESFA Food Credits (Free College Meals) for students continuing a programme they began when aged 16-18 or with an EHCP
- Hardship fund
 - The Activate Learning group raises funds through donations to a Hardship Fund; a small fund to support students in crisis. Typically, this fund is used for domestic emergencies and allocation of this fund is made on an individual basis.
- In addition, the colleges promote the Government's Care to Learn childcare scheme for young people who began their programme of study when aged under 20.

General Eligibility criteria

To be eligible students must be:

- on a funded course or programme
- considered a 'home' student for the purposes of further education funding. 'Home' status is the same for the bursary as it is for fee eligibility purposes
- living in a low-income household or in receipt of an income related benefit or have a dependent or parents (or someone acting in the place of their parent) on low income or in receipt of an income related benefit. If students or their parents receive an income-assessed benefit other than Universal Credit, they will not be financially assessed but will need to provide up-to-date evidence of the benefit they receive.

Students will not be eligible if they are:

- enrolled on level 3 – 4 courses, are not eligible for fee remission and do not have a letter approving their Advanced Learner Loan
- confirmed as an international student for fee purposes
- a waged apprentice
- a higher education (HE) student
- on a course that is funded wholly from other sources (i.e. where the course is not funded by the ESFA)
- a prison-based learner, learning whilst released on temporary license or learning whilst in a young offender's institute
- eligible to receive an alternative source of guaranteed funding

How students are assessed

- Students are financially assessed against the household income for the 2018/2019 tax year (6 April 2018 to 5 April 2019)
- Relatives, partners and other adults in the household need to declare their gross income (e.g. wages, income from self-employment, Tax Credits, Universal Credit, Housing Benefit, other benefits).

The following learners will not be assessed

- Asylum seekers whose residency application has not been refused.
- Care leavers who can confirm their status via a letter from their social worker or leaving care adviser.

These students have automatic eligibility given their circumstances.

Additional specific eligibility criteria for each bursary

Travel Bursary

To be eligible students must:

- have a household income of £32,000 or less
- live no less than 2.5 miles walking distance from their college campus (using Google maps)
- study at the nearest Activate Learning campus providing their chosen course.

Study start-up costs, trips and work placement bursary

To be eligible students must:

- have a household income of £32,000 or less
- have non-essential course costs and trips

Childcare Bursary

To be eligible students must:

- have a household income of £32,000 or less
- Have applied for all statutory government benefits before applying for the childcare bursary. Further information may be found at <https://www.childcarechoices.gov.uk>
- Have provided a copy of their child's/ children's birth certificate and a letter confirming they receive Child Benefit for their child/ children before any payments are made to the childcare provider.

Food Credits (free college meals) for continuing students and students aged 19-24 with an EHCP

To be eligible students must be:

- continuing the same study programme they began aged 16 to 18 (19+ continuers)
or
- aged 19 – 25 and have a Learning Disability Assessment (LDA) or an Education, Health and Care Plan (EHCP)
and
- in receipt of / or their parents must be in receipt of one of the following benefits:

- Income Support
- income-based Jobseeker's 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 four weeks after someone stops qualifying for Working Tax Credit
- Universal Credit with net earnings not exceeding the equivalent of £7,400 per year or £616.67 month
- received EFSA free meals in 2018-19, evidenced by pupil premium data provided by the Local Authority

Residential Bursary

To be eligible students must:

- attend a specialist course where that provision is not available in the area where the student lives
- not be in receipt of Housing Benefit
- have a household income of less than £32,000
- be studying their first full-time level 2 or level 3 qualification
- be on a course more than either 15 miles or a 2-hour round trip from home and not be available any other provider closer than that.

Evidence requirements explained

- Household income is a measure of the combined incomes of all people sharing a household or place of residence.
- If applying as a single income household further evidence will be required to confirm this i.e. council tax letter, tenancy agreement or employer contract.
- If students live with their parent/s or partner (or someone acting in the place of their parent/s), they will be required to provide information about their income to support the financial assessment of their application.
- home address must match the bursary evidence
- Household income is the primary evidence of eligibility. Consideration is made based on the distance of travel from home to the campus and the number of dependent children in the household.
- Applications will also be considered if they are accompanied by a supporting statement from Activate Learning Student Support Team.

Evidence required:

Applicants are required to apply for all statutory benefits before applying for a bursary. For further information on government benefits you are eligible for, please visit www.gov.uk/benefits-calculators

Standard evidence requirements for all applicants.

- a. If there is only one adult aged 18 or over in the household, their most recent Council Tax bill or tenancy agreement in addition to the standard evidence below.

- b. All applicants must provide copies of **one** of the following:
- Evidence that the household receives an income-assessed benefit, with the letter to be dated within the past three months. If their household receives Universal Credit, three months of Universal Credit Statements each showing the net monthly earnings.
 - If the household does not receive income assessed benefits all pages of their household's Tax Credit Award Notice (TC602) showing income for 2018/19 or later.
 - If the household does not receive income-assessed benefits or Tax Credits, three consecutive months' wage slips for each adult in the household or income from self-employment, to include all pages of HMRC tax bill for the previous year.

Note: Child Benefit, Personal Independence Payment and Disability Living Allowance are not considered when assessing bursary applications.

Support provided through each bursary

Travel Bursary

- The maximum award for travel is £2,000 p.a. unless exceptional circumstances are evidenced

Travel passes

- Travel passes are provided to eligible students who attend college for a minimum of three days per week.
- We will purchase a travel pass on a student's behalf for the journey detailed on bursary application form or for the most cost-effective method of travel.
- We will not usually support the cost of travel using a different mode of transport for the same journey when the pass has been issued
- Passes will be purchased for the journey from the address on the college system. We do not support the cost of travel to college from additional addresses. Where possible we will purchase an annual pass, if this is not available, we will buy a travel pass for each term.
- If a student moves home within the year we will support the cost of travel from the new address providing the change of address is after two months of receiving the original pass.
- Passes will be available for collection from the Advice Centre at the college usually within three weeks of making the award.
- Students will receive a text message when their travel pass is ready for collection
- Funds will not usually be backdated; students are responsible for the cost of travel until their pass arrives. Any passes not collected within two weeks will be returned to the travel company and there may be a fee for reissuing the pass.
- Students are responsible for contacting the travel company if they need a replacement travel pass. (Exception for Great Western Railway (GWR), South Western Railway (SWR) West Midlands Railway (WMR) and Arriva passes). Students are responsible for paying any fees to the travel company to replace the pass.
- To apply for a replacement GWR.SWR WMR or Arriva pass students should complete a Replacement Pass / Damaged Pass form, available from the Advice Centre, which we will submit to the travel company.

- Travel companies will issue a maximum of two replacement passes, if the pass is lost a third time students are responsible for paying for a new pass.
- Oxford SmartZone passes need to be used on an Oxford Bus Company bus first before they will be accepted on a Stagecoach bus.
- If the students' attendance falls below 50% and they have been provided with a termly travel pass, travel expenses will be awarded for the following terms instead of issuing a travel pass. Students who have a travel smartcard may have a stop placed on their travel card by the travel provider if their attendance falls below 50%.
- If a student leaves or withdraws from the course before the end of the year, their Smart card travel passes will have a 'stop' placed on them by the travel provider.
- Passes that are used fraudulently and confiscated by the travel provider will not be replaced.
- If a student is provided with a Reading Bus pass it is their responsibility to register the card number at https://reading-busesshop.co.uk/ssp/readingbus_gdpr/account.jsp?productId=3#firstLogin.
- We will not provide students with a second travel pass if they have not registered their bus pass with the Reading Bus Company and as a result are unable to obtain a replacement for a lost pass.

Travel contributions for travel passes

- Students' contribution towards their travel pass is £30.
- Travel contributions are non-refundable.

Travel expenses

Travel expenses are awarded if:

- public transport is not available for the journey
- we do not have a purchasing agreement with the travel company
- the student is timetabled to attend college less than three days per week.
- a student has exceptional circumstances

Travel expenses for fuel are awarded at 15p per mile for the return journey.

Travel expenses are usually paid monthly in arrears and are paid proportionate to their attendance the previous month.

Food Credits (for continuing students and students aged 19-24 with an EHCP)

- If students have been awarded a food credits, they are entitled to receive a breakfast and lunch meal deal to the value of £4.50 per day on the days they are timetabled to attend college.
- Students scan or show their college ID card at the till as payment for their meal
- Students attending a placement or who are studying at a site without the cashless payment system will receive a monthly BACS payment to enable them to purchase a meal
- Students not eligible for free meals under the funding guidelines but have been assessed by a support worker as needing free meals credits, may be awarded college

discretionary food credits under hardship.

Childcare Bursary

- The Childcare Bursary provides a contribution towards the cost of childcare. The amount of funding is discretionary but will normally be for a maximum of £180 per week per child.
- Funds will initially be allocated for up to two children per household. Funding for any additional children will be subject to availability
- Students are encouraged to apply for a childcare bursary before the start of their course as payments are not normally backdated more than 28 days from receipt of the fully completed application
- Students and their childcare providers will be sent an email confirming the award with a copy of the terms and conditions. Both parties are required to sign and return the form confirming they agree to the terms and conditions.
- Any agreement made with a childcare provider is between the student and the childcare provider
- If students enrol on a series of short courses e.g. ESOL, bursary funds will be awarded to support childcare while the student is attending timetabled classes. Funds are not awarded for childcare in between courses.
- If students are required to attend additional revision sessions, they may apply for additional funds for these sessions. Students will be required to evidence the sessions they are attending.

Study start-up costs, trips and work placement bursary

- Any equipment and materials that are essential for a course may be borrowed from college, therefore the course costs bursary cannot support these costs.
- The bursary fund provides a contribution towards course costs and materials, the award is usually 50% of the cost.
- Receipts are required for any items purchased with the support of bursary funds. If receipts are not provided within four weeks of the award the student will be required to return the bursary funds awarded to them.
- Students who have additional costs to attend their work placement, may apply for support for work placement related costs.

Students may be awarded funds for:

- equipment and materials that are not essential for the course
- non-essential trips that support the learning aim including trips abroad
- the travel, food and residential element of trips that are essential to the course
- fees for add-on courses that are not essential part of the programme e.g. spray tanning, personal trainer courses
- UCAS fee
- costs associated with attending university interviews/open events
- costs to respond to emergencies
- Work Placement costs
 - Where a work placement is in an area not supported by their travel pass,

- If a student has been awarded food credits, we can make payments to by BACS towards meals
- If students need protective clothing

Note: bursary funds do not support the purchase of laptops or any other IT equipment.

Residential Bursary

- The bursary provides a contribution towards residential costs for students attending a specialist course where the provision is not available in the area where they live. Each award is based on individual circumstances and the type of accommodation and length of stay required.
- Bursary payments do not support travel from the term time address to college. Students may be awarded a travel bursary for a weekly return journey from home to the term time address.
- Payments for accommodation are made directly to the landlord.
- Bursary awards are as follows:

| Gross household income | £ per year |
|-------------------------------|-------------------|
| Band 1 | Up to £3,458 |
| Band 2 | Up to £2,305 |
| Band 3 | Up to £1,152 |

Discretionary hardship bursaries

- Discretionary hardship bursaries are awarded to students identified by Student Support as having extenuating circumstances. Awards may be in kind, a single payment or scheduled payments. Regular payments for living costs will not be awarded.

Appeals

- If the student is not satisfied with the outcome of their bursary application, they may appeal in to the Group Head of Advice and Admissions.
- The appeal should be submitted in writing with a supporting statement no later than seven days from receiving notification of the unsuccessful outcome.
- The appeal may be submitted by email or post to; studentfinance@activatelearning.ac.uk or Group Head of Advice and Admissions, Activate Learning, c/o Banbury and Bicester College, Broughton Road, Banbury OX16 9QA
- Appeals are processed within five working days and the outcome of the review is communicated by email or letter. Once their appeal has been considered and a decision has been communicated, there is no further right of appeal.

Feedback

- If students are not satisfied with how their bursary application has been handled, they may write to feedback@activatelearning.ac.uk

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| ALL | Advanced Learner Loan |
| LDA | Learning Disability Assessment |
| EHCP | Education Health and Care Plan |
| FE | Further Education |
| HE | Higher Education |
| UASC | Unaccompanied asylum-seeking child |
| BACS | Bank Automated Clearing Services |

References

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