



South Gloucestershire and Stroud College

## 16-19 Bursary Fund Policy and Procedures for the Disbursement of Funds in 2015-2017

If you would like this document in an alternate format  
Please contact the Human Resources Department

<b>Prepared by:</b>	Nick Herbert (Bristol Campuses) Jennifer McBain (Stroud Campus)
<b>Job Title/Role:</b>	Deputy Head of Learner Services (Bristol) Deputy Head of Learner Services (Stroud)
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<b>Approved by:</b>	Executive Team
<b>Date:</b>	26 <sup>th</sup> March 2015

# Impact Assessment



<b>Have you consulted on this policy? Details:</b>	Yes		
<b>What evidence has been used for this assessment?</b>	Education Funding Agency (EFA) Guidelines		
<b>Could a particular group be affected (negatively or positively)?</b>	<b>Positive Impact</b> Indicate Y where applicable	<b>Negative Impact</b> Indicate Y where applicable	<b>Evidence</b>
<b>Characteristics protected by the Equality Act 2010</b>			
Age	N/A	N/A	
Disability	N/A	N/A	
Gender Reassignment (inc. Transgender)	N/A	N/A	
Race (inc. Gypsy & Traveller)	N/A	N/A	
Religion and Belief	N/A	N/A	
Sex	N/A	N/A	
Sexual Orientation	N/A	N/A	
Marriage & Civil Partnership	N/A	N/A	
Pregnancy & Maternity	N/A	N/A	
<b>Characteristics designated by SGS as requiring due regard</b>			
Carers and Care Givers	Y	N/A	The process of allocating the 16-19 Guaranteed Bursary to LAC / CL has been reviewed and will ensure a more transparent efficient distribution of funds to this vulnerable co-hort.
Persons in Care and Care Leavers	Y	N/A	
<b>If any negative impacts are identified, are there any related policies, services, strategies, procedures or functions that need to be assessed alongside this screening? No</b>			
<b>If yes, please detail:</b>			
<b>Should this policy, service, strategy, procedure or function proceed to a full Impact Assessment? No</b>			
<b><i>We are satisfied that an initial screening has been carried out on this policy/procedure and a full Impact Assessment is not required</i></b>			
<b><i>We understand that the Impact Assessment is required by the College and we take responsibility for the completion and quality of this assessment</i></b>			
<b>Completed by:</b> Nick Herbert		<b>Position:</b> Deputy Head of Learner Services	<b>Date:</b> 02-Apr-15
<b>Checked by:</b> Emma Jarman		<b>Position:</b> Vice Principal Learner Services & Quality	<b>Date:</b> 02-Apr-15

# **16-19 Bursary Fund Policy & Procedures for the Disbursement of Funds in 2015-2017**

## **1. Introduction**

- 1.1. South Gloucestershire & Stroud (SGS) College recognises that the 16-19 Bursary has an important role to play in removing barriers for some Learners accessing and completing further education courses. It is the aim of SGS College to use funds to make the maximum impact on recruitment, attendance, retention, achievement and success rates.

## **2. Statement**

- 2.1. This document covers all Learners 16-19 enrolling SGS College from September 2015.
- 2.2. The fund will be distributed in a consistent and equitable way and in accordance with guidance issue by the Education Funding Agency (EFA). Learner eligibility will normally be determined through assessment of the Learners' social and economic disadvantage. Where possible and appropriate, awards will be determined using household income and personal circumstances as the main indicators.
- 2.3. The bursary allocation is finite: Learners who are eligible for support are not automatically entitled to it. If demand exceeds the available funds, reduced awards may be given. When the fund is fully committed no further awards will be made.

## **3. Objectives**

- 3.1. It is the policy of the College to optimise the use of 16-19 Bursary Funding to provide support to those young people facing the greatest financial barriers to continuing in education.

## **4. Responsibilities**

- 4.1. The Head of Learner Services has overall responsibility for 16-19 Learner Bursaries.

## **5. Related Policies, Procedures and Guidance**

- 5.1. Education Funding Agency (EFA) Guidance
- 5.2. Fee Policy and Charges 2014-15
- 5.3. Applications, Admissions and Enrolments Policy and Procedure

- 5.4. Learner Code of Conduct 2014-15
- 5.5. Single Equality Policy
- 5.6. Compliments, Suggestions and Complaints Policy and Procedure

## **6. Procedure**

### **6.1. Eligibility for the 16-19 Bursary:**

6.1.1. To be eligible to receive a bursary the Learner must:

- be aged 16 to under 19 on 31 August in the academic year in which they start their programme of study, they can continue to be supported to the end of the academic year in which they turn 19, or to the end of the programme of study, whichever is sooner; and
- satisfy the residency criteria set out in the EFA guidance and must include the appropriate evidence in their application to prove eligibility:
  - a. Completion of the residency section stating 'ordinary residence in the UK for three years preceding the start date of the course with main purpose other than for education'.
  - b. Learning agreement showing home fees being charged.

### **6.2. Bursaries will not be paid to:**

- Learners on Higher Education courses;
- Learners on waged Apprenticeships;
- Learners in prison or a young offender institution or who have been released on temporary licence, for example, day release; or
- Learners under 16 years of age or over 19 years of age on 31 August of the year they begin their programme of study.

6.3. The following groups of Learners are eligible to apply for the 16-19 Bursary Fund but SGS College will take account of any allowances or other sources of financial support received when deciding whether to award a bursary:

- Learners attending provision funded solely by the European Social Fund and receiving a training allowance.
- Learners resident in Wales or Scotland, who may be receiving EMA.

## 6.4. Priority Groups

6.4.1. All Learners eligible to apply will be prioritised for funding as follows:

### Priority 1 – Guaranteed Learner Bursary

- Young people in care, including unaccompanied asylum-seeking children.
- Young care leavers.
- Young people getting Income Support or the equivalent Universal Credit (UC) in their own right.
- Young people getting both Disability Living Allowance (or the new Personal Independence Payments) and Employment Support Allowance (ESA) or Universal Credit as a replacement for ESA in their own right.

6.4.2. In accordance to EFA guidelines these Learners will be eligible for a Bursary up to £1,200 per year. SGS College has determined that this Bursary will be made up of payments in kind, to cover, where needed:

- Travel
- Equipment (including kits and uniforms)
- Material Fees
- Disclosure and Barring Service (DBS) Checks
- Food
- Books

6.4.3. Any remaining money will be paid to Learners in regular instalments over the academic year. Payments will be subject to satisfactory attendance (minimum of 90%), punctuality and behaviour. Checks will be made on a weekly basis.

6.4.4. Where the Learner's circumstances change in-year and they become eligible as a vulnerable Learner, they will receive a pro-rata amount depending on how many weeks are remaining to the completion of the course.

6.4.5. It is important that all vulnerable Learners, who are entitled to the Guaranteed Bursary are identified before the end of October 2015 as there will be a data return to the funding body at this point, which will inform the 2016-17 allocation of vulnerable Learner funding.

## **Priority 2 – Discretionary Hardship Bursary**

- 6.4.6. Learners from households on a low income and/or in receipt of an income based benefit e.g. Income Support, Working / Child Tax Credit, Pension Credit or Job Seekers Allowance.
- 6.4.7. Learners can apply for help with travel, equipment, material fees and uniforms. Any payments will be made in kind wherever possible and will be subject to availability of funds and satisfactory behaviour, attendance (minimum of 90% – unless extenuating circumstances), punctuality and progress. Checks will be made on a termly basis for all bursary payments.
- 6.4.8. Should attendance drop below 90% all payments may be stopped and reinstated should attendance improve.

***Please note: Learners will need to have a current bank account.***

### **6.5. Levels of Financial Support**

- 6.5.1. Thresholds for funding assistance from the Bursary Fund will be prioritised:
- 6.5.1.1. Priority Group (1) – Household Income below £16,109 (Evidence of ESA, JSA, IS, Council Tax Benefit, Housing, Benefit, Universal Credit).
  - 6.5.1.2. Priority Group (2) – Household income between £16,109 and £22,000 (Evidence of Benefit or P60 / self-employed accounts)
- 6.5.2. Monetary awards will be based upon student's individual circumstances and will be at the discretion of the College and in line with EFA Bursary guidelines and available funds. If learners did not fall into one of the above priority groups based on household income but can demonstrate sufficient need the College will award in line with discretion outlined within the EFA guidelines.

### **6.6. Assessment**

- 6.6.1. Learners who apply for the Bursary will be required to supply evidence of household income and information about their actual need for support. This should be in the form of benefit or other official documents or verification from statutory or other agencies.
- 6.6.2. This could include:
- Certified letter from the LA regarding Free School Meals – certified letter from the DWP;
  - P60 (additional evidence will also be required);

- Self-Employment Income evidence; or
- Other means tested certification

## 6.7. Changes of circumstances

6.7.1. Learners will be required to disclose any change of circumstances during the year, which may affect their eligibility for assistance. If a Learner in receipt of assistance leaves before the completion of the course, they may be required to repay all or part of their award, or return any equipment purchased with their award.

## 6.8. Emergencies and Crisis

6.8.1. South Gloucestershire & Stroud College will make provision to deal with immediate financial assistance and crisis payments following full assessment.

## 6.9. Appeals

6.9.1. Notification of awards, provided the application is completed in full, for the Bursary will normally be made in writing 4 weeks from receipt of application forms.

- Unsuccessful applicants may appeal in writing to the Bursary Panel within 10 working days of receipt of their notification, setting out their reasons for appeal. The Panel will review the application and inform the Learner in writing, within 10 working days of the Panel date, the outcome of the appeal.
- If the Learner is appealing against a decision made by the Panel, they need to appeal in writing to the Vice Principal, Learner Services and Quality at South Gloucestershire and Stroud College, who will reply within 14 working days of receiving the letter.

## 6.10. Procedure for Allocation and Recording of the Bursary Fund

6.10.1. Learners can either collect a Bursary Fund Application Form at enrolment or direct from the Learner Services Department or email the Welfare Team [welfare@sgs.ac.uk](mailto:welfare@sgs.ac.uk).

6.10.2. The Bursary Administrator will test the application against the eligibility criteria and check the evidence and assess the need for funding. They may discuss the application with the Learner if required.

6.10.3. If the Learner is eligible for an award, the Bursary Administrator will process the application. Copies of the evidence supplied will be retained with the application form.

- 6.10.4. Any application that requires special consideration will be forwarded to the Head of Learner Services, who will consider the application and decide the level of any award.
- 6.10.5. The Bursary Administrator will arrange for the award to be paid either via bank transfer, cheque or cash or by Journal Transfer to the appropriate Curriculum area or direct to the supplier.
- 6.10.6. Take-up of the 16-19 Bursary is monitored annually in relation to retention and reported in the self-assessment report.
- 6.10.7. Feedback from Learners on the impact of the bursary on their learning is collected annually.

#### **6.11. Administration**

- 6.11.1. Providers are allowed to use up to 5% of the total allocation for Administration costs.
- 6.11.2. There will be an in-year management return at the end of February 2016 to determine the number of vulnerable Learners (full and pro-rata) identified. This will inform the 2016/17 allocation for vulnerable Learners.
- 6.11.3. The College will keep financial records of all awards made for a period of six years.

#### **6.12. Complaints**

- 6.12.1. The College Compliments, Suggestions and Complaints Policy and Procedure can be followed if the Learner is not satisfied with their treatment under this policy and procedure.

# Student Financial Support Process (2015-16)

