

<b>Policy title:</b>	Learner Bursary Policy and Procedure		
<b>Scope:</b>	PM Training		
<b>Policy owner &amp; job title:</b>	Dan Canavan, Director of Training Operations		
<b>Approver:</b>	Board		
<b>Date:</b>	1 August 2018	<b>Review Due Date:</b>	31/07/19

## POLICY SUMMARY

This policy sets out our overall approach to Guaranteed and Discretionary Bursary for learners aged 16-18 years.

### Associated Policies & Procedures:

Learner Conduct  
Prevent Strategy  
Safeguarding Policy

## 1. POLICY STATEMENT

PM Training recognises that the Learner Bursary has an important role to play in removing barriers for some learners accessing and completing their education courses. It is the aim of PM Training to use funds to make the maximum impact on recruitment, retention, achievement and success rates

The fund will be distributed in a consistent and transparent way in accordance with the guidance issued by the Education and skills funding Agency (ESFA).

The bursary is intended to help with the needs of the individual young person studying a programme of learning with PM Training. Awards from the Bursary will be used towards essential course related costs such as travel, meals, equipment, uniform/clothing, trips and other costs associated with learning.

Discretionary awards will be subject to sufficient funds being available.

## 2. PRINCIPLES:

- Any bursary payment that is provided is dependent upon a number of factors and support may be reduced or withheld if the learner does not meet the conditions that are expected of them. Payments are subject to attendance, punctuality and behaviour. A Learner must attend all days as required, attend all timetabled lessons including English and Mathematics, be punctual each

day, work to the best of their ability and meet the appropriate standards of behaviour expected.

- The bursary should be applied fairly and consistently.
- The process must be easily understood and accessible to young people. The Learner Services Team will provide an overview of the process to all learners and learners will be able to see Learner Services staff for a one to one interview if required. The Learner Bursary will be publicised via Learner Services and PM Trainings website.
- The process should identify eligible learners in a timely fashion.
- There is a commitment to ensuring bursary funds allocated to PM Training are fully distributed in order to support as many learners as possible, however, budgets are provided by the ESFA, and therefore, PM Training can only make payment if there is sufficient funds.

### **3. ELIGIBILITY:**

To be eligible to apply for the Learner Bursary Fund learners must be:

- Enrolled on a course at PM Training which is NOT part of a government training scheme
- Aged 16 years or over
- A “home” learner, i.e. having been ‘ordinarily resident’ in the British Isles or European Union for purposes other than education for 3 years prior to the commencement of the course
- In one or more of the priority groups listed in section 4 or live in a household where they are in receipt of a means tested benefit listed in section 5.
- Maintaining satisfactory attendance and progress in the professional judgement of their Learner Services Support worker

### **4. GUARANTEED BURSARIES:**

Learners aged 16 to 18 (at the start of the academic year) are eligible for a guaranteed bursary of £1200 a year if they are:

- Young People in care
- Care leavers
- Young People who are living with foster parents

- on 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 child or partner.
- disabled young people in receipt of Personal Independence Payments and Employment and Support Allowance or Universal Credit

## 5. DISCRETIONARY BURSARIES:

Learners aged 16-18 (at the start of the academic year) who face genuine financial barriers to staying on in education and training to help with costs such as transport to PM Training, work placements and interviews, meals, field trips, work wear, uniforms and equipment.

Learners living with parent(s)/carer(s)/Guardian(s) OR who live with a spouse/partner who is in receipt of any of the means tested benefits below are eligible for a discretionary bursary:

- Income Support (or Universal Credit)
- Income Based Job Seekers Allowance
- Income Based Employment and Support Allowance
- Disability Living Allowance (Personal Independence Payments)
- Child Tax Credit (and NOT eligible to receive working tax credit) with an income of £16 190 or less.
- Support Under Part VI of the Immigration and Asylum Act 1999
- Working Tax Credit Run on (Paid for 4 wks after you stop qualifying for WTC)
- Guaranteed Element of Pension Credit
- Housing Benefit
- Incapacity Benefits
- Council Tax Credit
- Working Tax Credit

## 6. PROCEDURES:

Applications are made in writing on forms that are available from Learner Services, and the PM Training website.

Promotion of the fund will be carried out in a number of ways to ensure the maximum numbers of learners who need help are identified:

- All learners will be sent an application form and guidance once they have received an offer to join a Study Programme or Traineeships with PM Training
- Learner Services will publicise the availability of the funds during induction and also to learners who start their courses late
- Learner Services will identify learners who experience a change in circumstances during the year that has resulted in them experiencing financial hardship

- 16 -18 Discretionary, bursary awards will be subject to sufficient funds being available.
- Applicants must provide evidence as detailed on the bursary application form.
- Applications will be prioritised in accordance with EFA and SFA guidance. Each application for a bursary is judged on the basis of 'relative financial need' and not all applications will be successful.
- Details of the estimated total allocation of funds for each applicant will be entered onto a database that analyses the applicants' data per the EFA and SFA Return requirements.
- The estimated total allocation of funds will be monitored continuously while applications are being processed to ensure the most effective use of funds.

## 7. ASSESSMENT:

The application will be assessed by PM Trainings MIS team; the outcome is recorded on the assessment form.

Once the assessment has been completed the Tutor/Case worker (whoever is the most appropriate depending upon the Centre the learner is based) will be informed of the outcome. Successful applicants will be informed of the level of assistance they will receive and in what form this will take.

If the learner does not agree with the decision then they can raise an appeal either at the time they are notified of the decision by Tutor / Case worker or by emailing [misenquiries@pmtraining.org.uk](mailto:misenquiries@pmtraining.org.uk).

The MIS Team will arrange for the application to be reviewed by a Line Manager, who would contact the learner separately once this had been completed to give them feedback. If the learner is still not satisfied with the outcome they can ask for the appeal to be raised with a Superior – who will review the information received and will contact the learner directly with the final outcome.

## 8. AWARDS:

### Guaranteed Bursaries:

A total payment of £1200 per academic year will be made (this amount is based on the learners course running for longer than 33 weeks and being classed as a full time course. For shorter courses or if the course is classed as part time, a pro rata amount will be calculated).

Learners who are eligible for this bursary can ask Learner Services to:

- Order their weekly travel passes
- To pay for meals from the canteen during the day if applicable to eligibility.

## Discretionary Bursaries:

For those learners assessed as in need funding is available for the following:

Expense	Amount
Daily Allowance	Sliding scale from £4 per day to £10 per day depending upon learner need. Learner Services Advisor to make a decision based on individual learner needs.
Transport to centre	Weekly bus pass (£19.50 per week)
Uniform	100% of the cost of purchasing mandatory uniforms
Work Wear	Up to 100% of work wear required up to a maximum of £100
Field Trips (including Personal and Social Development Trips organised by Learner Services)	Up to 100% of costs of the trip e.g. transport, entrance fees and subsistence allowance of £15 per learner per day. A total of £400 per learner for all trips per annum.
Tools/Equipment*	Up to £200 per learner towards equipment and tools required to complete the course and support the learner into future employment
Meals	Breakfast from the canteen Lunchtime: sandwich, drink, fruit, yogurt, crisps to the value of £2.41 from the canteen.
Learner Assistance	Confidential support for mental health and well-being sessions

\*Payment will not be made for laptops or tablets except in exceptional circumstances. Any laptops or tablets purchased through the discretionary bursary must be returned to PM Training on the completion of the course.

For learners that are found not to be eligible for the Discretionary Bursary we will refer the application to the Realise Foundation Barriers Fund to see if assistance can be provided. Realise can also refer learners to PM Training if they feel that the learner is eligible for discretionary Bursary

## 9. PAYMENT:

Payments will be made direct from PM Training to a third party wherever possible. (e.g. bus passes, trips, work wear and equipment).

Weekly guaranteed bursary payments will be made by BACS transfer into learner's bank account, meals will be deducted if required.

If learners are eligible for free meals, they can collect a meal from the canteen whilst in centre. When on a work placement payments will be made directly into the learner's bank account.

## **10. PAYMENT CRITERIA**

Where attendance or behaviour proves to be unsatisfactory, monies will be withheld.

If attendance drops below 90% payments will require authorisation and confirmation of satisfactory academic progress from the Tutor.

If a learner receives a warning or sanction under the formal disciplinary procedures future payments will be affected.

If a learner has received financial assistance and leave before the completion of their course they may be required to repay all or part of the discretionary bursary.