

# West Berkshire Training Consortium

## The 16-19 Bursary Fund and Free Meals Policy 2016-17

### 16 – 19 Bursary Fund

#### **EFA Guidance (April 2016) has been used to update this policy**

The 16-19 Bursary Fund helps 16- to 19-year-olds continue in EFA funded education, where they might otherwise struggle for financial reasons. It is made up of two parts – government bursaries of up to £1200 a year for the most vulnerable young people and a discretionary fund for schools, colleges, academies, training providers and local authority learning providers to distribute to other students who face genuine barriers to participation.

The 16-19 Bursary Fund has two elements:

1. A vulnerable student bursary of up to £1,200 a year for young people in the following defined vulnerable groups:

young people in care or care leavers

young people claiming [Income Support](#) or [Universal Credit](#) in their own right

disabled people getting [Employment and Support Allowance](#) and [Personal Independence Payment](#) in their own right

2. Discretionary awards made by providers to young people in ways that best fit the needs and circumstances of their students. Discretionary bursary awards should be targeted towards those young people not eligible for the vulnerable student award who face the greatest financial barriers to participation; such as the costs of transport, meals, books and clothing or equipment.

## **Accessing Vulnerable Student Bursary**

If a young person is eligible for a vulnerable student bursary they should declare this on the application form and WBTC will apply to the student bursary support service (SBSS) on their behalf. WBTC will support the learner with supplying the appropriate evidence for the claim.

Providers are free to determine the assessment criteria for eligibility for discretionary bursaries and the frequency of payments for all awards.

## **WBTC Policy for Discretionary Bursary Payments**

WBTC operates 2 programmes to which this policy applies:

16-19 Study Programmes including Traineeships – variable length programmes including part time and full time planned hours.

Shorter NEET reduction programmes with variable hours/weeks of attendance.

Both programmes are aimed at young people who may experience a variety of obstacles to engaging in education/employment. Furthermore there is a high proportion of additional learning needs and social disadvantage associated with the target groups.

## **Assessing real need**

It is proven that the payment of an allowance such as EMA or Bursary significantly impacts on attendance and engagement among these learners. The allowance enables learners to overcome obstacles that prevent engagement such as travel costs and food. Many of the client group come from highly disrupted backgrounds in which the evidencing of household income might be an obstacle to applying for a bursary.

In line with EFA guidelines WBTC is 'free to determine the assessment criteria for eligibility for discretionary bursaries and the frequency of payments for all awards'. WBTC has assessed on previous experience that the Bursary or WBTC funded allowance is necessary for all non-waged learners to help them sustain their engagement and attendance.

However, in line with government guidance WBTC will attempt to assess 'real need' through a checklist approach for new learners in 2016-17 including those who re-enrol on the Study Programme. The checklist will help determine real need for a discretionary bursary and evidence that need. It will also help assess the amount of discretionary bursary appropriate. In order to ensure that EFA discretionary bursary funds are directed appropriately we will need to ask for evidence of household income or benefits.

## WBTC charitable funds

It is expected that the EFA Bursary will be insufficient to meet the needs of all learners and WBTC is committed to 'topping up' provision through its own charitable reserves. WBTC is mindful that learners are a protected group by virtue of age and will support learners on EFA funded/commissioned programmes who are ineligible for a Bursary or where the Bursary fund has been expired. The balance between allocation of discretionary Bursary funds and WBTC 'top up' is given in the table below.

| <b>Annual Gross Income in your household</b> | income less than £16,191 or<br>In receipt of income-related state benefits defined below:<br>Universal Credit<br>Income Support / Employment Support Allowance<br>Housing Benefit<br>Job Seekers Allowance<br>Working Tax Credit / Child Tax Credit<br>Personal Independence Payment | Income £16,191 to £25,500 | Income £25,501 to £30,000 | Income £30,001 to £35,000 | Income over £35,000 |
|--|--|---------------------------|---------------------------|---------------------------|---------------------|
| <b>Maximum Bursary Awarded</b>               | £20  | £15                       | £10                       | £5                        | Nil                 |
| <b>WBTC top up</b>                           | Nil  | £5                        | £10                       | £15                       | £20                 |

## Equality

Guidance does require WBTC to have a clear policy on how we apply assessment against real need. However the Bursary does not appear as a means tested benefit in the guidance nor is there any guidance on how finances or circumstances would be used to set a threshold to refuse in total or in part the payment of a Bursary. Therefore to comply with equality legislation, maximise opportunity for all learners and provide the fairest use of public money WBTC has implemented this policy.

## Payments to Study Programme and ESF learners

The maximum weekly Bursary that will be paid is £20 per week for attendance on these programmes. £20 as a maximum is paid to learners on a full time equivalent programme only. Thereafter maximum payments will be made according to planned timetabled hours as shown in the table below, so part time learners will receive less.

If a learner's planned programme changes during the year, the maximum weekly Bursary will be adjusted accordingly.

It will be paid into the learner's bank account where ever possible and only then on the submission of either a signed timesheet or evidence via the attendance register. Learners are paid according to planned attendance and deductions will be made if full attendance is not achieved. Additional payments may be made to learners who attend additional activity such as extra sessions or work placements where the £20 weekly allowance is considered insufficient to sustain their engagement. This will be assessed on an individual basis.

| Planned hours                | Maximum Bursary/Allowance per week | Session rate |
|------------------------------|------------------------------------|--------------|
| 12 or more sessions per week | £20                                | £1.25        |
| 6-11 sessions per week       | £15                                | £1.25        |
| up to 5 sessions per week    | £10                                | £1.25        |

1. Learner A has a planned timetable of 14 sessions per week. They attend all 14 i.e. 100% attendance and receive £20 for full attendance.
2. Learner B has a planned timetable of 14 sessions per week. They attend 12 sessions and are absent for 2 sessions. They receive £15.
3. Learner C has a planned timetable of 7 sessions per week and is therefore part time. They attend 7 i.e. 100% attendance and they receive £15.

### **Accessing maximum payments**

These payments are there to motivate full attendance and to reflect the extra costs involved to a learner with additional study hours. It is important that only 100% attendance receives the maximum weekly payment, and that larger payments are paid for larger timetables. In essence a learner is having their Bursary/Allowance reduced for less than full attendance.

The only authorised absence that will be paid will be bank holidays in term time. This is usually restricted to May Bank Holidays or other one-off national holiday dates. In these circumstances the learner's attendance is assessed for those days that they are able to attend. Therefore if they have scheduled lessons on a holiday Monday they are assumed as having attended.

### **Travel**

All learners must cover the first £5 of travel expenses from their allowances. Anything over this will be paid only on the presentation of proof of travel such as bus tickets or train tickets. In some cases of hardship such as rural isolation or safeguarding taxi fares will be considered.

### **In kind payments**

Learners assessed as needing clothing for job interviews, PPE or general well-being will be allotted a budget maximum of £100. Only items that a learner does not possess will be purchased by WBTC for them and it will not be deducted from their weekly Bursary payment. To do so could be discriminatory to the neediest and impact on attendance. WBTC has a dress code to create an environment of equality and enable the poorest learners to achieve self-respect and confidence. Therefore a significant number of learners will be expected to access support for clothing in part or in full. Other in-kind payments are considered on a case-by-case basis depending on personal need and can include but not be restricted to food and emergency payments in case of crisis.

## **Absence, sickness**

The Bursary allocation is insufficient to pay for absence of any kind and **WBTC does not pay Bursary** in the case of sickness, learner holiday or other forms of absence. Only attendance in learning, work experience or other programme related activity is covered by the Bursary. In some exceptional circumstances for example bereavement of a close relative, attendance at a funeral of a close relative or sickness incurred during a training session absence will be covered by a Bursary payment. This is judged on a case by case basis. WBTC may occasionally be forced to close or suspend learning e.g. for acute staff shortage and learners will be paid their allowance to avoid disadvantaging them.

## **Applying for a Bursary or WBTC funded allowance**

On enrolment on a 16-19 programme at WBTC, learners will be asked to complete a combined application form for Bursary and Free Meals. Where the learner is ineligible for EFA discretionary bursary funds then the application will be treated as an application for a WBTC funded allowance.

Learners will be provided with the application form and the learner guide and encouraged to discuss the application with parents/guardians who will, in most cases, need to supply the evidence. Learners will be informed that until the signed application and evidence are received no payments can be made.

All learners will be asked to complete the form in order to confirm that the offer of support has been made. There is the facility to declare that they do not wish to apply for any financial support.

The learners will be assured of a payment of some kind regardless of their background and it will be paid in accordance with their planned hours. This will enable WBTC to support and motivate participation and attendance of learners regardless of their household income.

## **Appeals**

Any learner who feels that they have been unfairly treated should first raise this with their training co-ordinator or the manager of their learning programme. They can appeal a decision i.e. if a bursary or allowance is refused. The final decision on such appeals rests with the Managing Director.

## Further Education Free Meals

From September 2014, the requirement for maintained school and academy sixth forms to provide free meals to disadvantaged students was extended to all FE funded institutions.

WBTC will apply the Education Funding Agency guidance (March 2015) in meeting this requirement for the 2016-17 academic year.

### Student eligibility

Students must be aged between 16 and 18 on 31 August 2016 to be eligible for a free meal in the 2016 to 2017 academic year. Students who turn 19 during their study programme will remain eligible for a free meal until the end of the academic year in which they turn 19 or to the end of their study programme, whichever is sooner.

Students aged between 19 and 25 who are subject to a Learning Difficulty Assessment (LDA) or Education Health and Care Plan (EHC Plan) and ESF students aged between 16 and 18 on 31 August 2016 are also entitled to a free meal while attending their provision if they meet the eligibility criteria.

Free meals are targeted at disadvantaged students. For the purposes of eligibility for free meals, 'disadvantage' is defined by the students being in receipt of, or having parents who are in receipt of, one or more of the following benefits:

- Income Support
- Income-based Jobseekers 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
- Working Tax Credit run-on - paid for 4 weeks after you stop qualifying for Working Tax Credit
- During the initial roll out of the benefit, Universal Credit

### Verification of student eligibility

The student, or their parent/guardian, must submit an application to the institution where they are enrolled.

As part of the application, institutions must ask the student (or their parent/guardian) to provide evidence of the award of the qualifying benefits set out above, for example an award notice or letter from the Department of Work and Pensions (DWP) or HMRC.

### Application process

WBTC will use a combined application form for the Further Education Free Meals and the 16-19 Bursary as many of the same qualifying elements apply.

Learners must apply for both elements if they wish to receive both.

**It must be noted that the WBTC allowance element of the Bursary does not apply to the free meals application. A free meals allowance will only be paid to qualifying learners as prescribed by government guidance and there will be no WBTC 'top up'.**

If a learner cannot provide evidence of eligibility for free meals, but there is concern that lack of food is having an effect on their learning or wellbeing, consideration of support will be made through WBTC discretionary 'in kind' payments on a case by case basis.

### **Payments process**

As WBTC is not in a position to provide actual meals to qualifying learners due to the lack of catering facilities and the fact that many learners are in work based provision, we will pay the designated sum of £2.41 per day of attendance directly into the student bank account. For the purpose of the free meals allowance, a 'day' is any day on which the learner attends a full timetabled session or work placement. The allowance is not paid if the learner attends for a non-timetabled meeting or review unless they also attend a learning session that day. The amount will only be paid when attendance has been evidenced through submission of a timesheet or by the attendance register.

### **Learner information**

WBTC has produced a simple guide to its Bursary and Free Meals system for applicants to use. It explains what a Bursary is, the purpose of the Bursary and how it is applied to learners. It also explains the Free Meals requirements.

Full guidance on the Department for Education 16-19 Bursary Fund and Further Education Free Meals policy can be found at <https://www.gov.uk/16-to-19-bursary-fund-guide-for-2016-to-20167> and <https://www.gov.uk/16-to-18-education-free-meals>

# WBTC 16-19 Bursary Fund and Free Meals

## Guide for Learners 2016-17

There are two ways you can get help to pay for essential education-related costs if you are 16 to 19 and in further education or training on an unwaged course.

**The Bursary Fund** can help pay for costs like:

- equipment and clothing you might need for your course
- lunch (unless you also qualify for free meals)
- transport to and from WBTC or your work placement

**The Further Education Free Meals** are available to 16-19 year olds in all EFA funded further education institutions. As we do not have a catering facility at WBTC this benefit is provided as a direct payment into your bank account alongside the bursary and travel payments. If you qualified for free school meals you may qualify for this allowance. WBTC is required to ask for evidence.

**You could get a government vulnerable student bursary of up to £1,200 a year if you are in one of the following groups:**

- young people in care or care leavers
- young people claiming [Income Support](#) or [Universal Credit](#) in their own right
- disabled people getting [Employment and Support Allowance](#) and [Personal Independence Payment](#) in their own right

If you are eligible for a **vulnerable student bursary** you will need to declare your circumstances on the application form and WBTC will apply on your behalf to the Student Bursary Support Service. We will help you with supplying the necessary evidence.

**If you are not in one of these groups, you could still get a discretionary bursary** depending on your personal circumstances. In order to allocate the discretionary bursary fund from the government, WBTC is obliged to make a reasonable effort to assess real need. Therefore we need to ask you about your household income and benefits and you will need to provide evidence. At WBTC we have a policy to ensure that all young people are treated fairly in line with equality legislation as young people are a 'protected group'. Therefore we use WBTC charitable funds to 'top up' the government funds where needed. How we do this is shown in the table below.

| Annual Gross Income in your household | income less than £16,190 or<br>In receipt of income-related state benefits defined below:<br>Universal Credit<br>Income Support / Employment Support Allowance<br>Housing Benefit<br>Job Seekers Allowance<br>Working Tax Credit / Child Tax Credit<br>Personal Independence Payment | Income £16,191 to £25,500 | Income £25,501 to £30,000 | Income £30,001 to £35,000 | Income over £35,001 |
|---------------------------------------|--|---------------------------|---------------------------|---------------------------|---------------------|
| <b>Maximum Bursary Awarded</b>        | £20  | £15                       | £10                       | £5                        | Nil                 |
| <b>WBTC top up</b>                    | Nil  | £5                        | £10                       | £15                       | £20                 |
| <b>Free meals allowance</b>           | £2.41 per day of attendance (any day you attend at least one full timetabled session)  | 0                         | 0                         | 0                         | 0                   |



It is your responsibility to inform anyone from whom you are receiving benefits if you are receiving a Bursary from WBTC. If you are not receiving benefits but someone in your family is then they may need to know too. 16 to 19 bursaries are paid directly to students in addition to other means-tested benefits paid to families, such as Income Support, Jobseeker's Allowance, Child Benefit, Working Tax Credit and Housing Benefit and does not affect them. WBTC can provide you with written confirmation about your course and the Bursary at any time.

£20 is the maximum weekly bursary allowance that WBTC will pay. However in addition WBTC will also refund travel expenses after the first £5 and provide clothing or essential equipment for work experience, interviews etc.

Free meals allowance is paid in addition to the bursary (for young people who qualify) for any day you attend at least one timetabled session.

## How your bursary or WBTC allowance is worked out

In order to be fair, and to recognise the increased cost of more days in learning, your maximum allowance is based on the planned timetable sessions that you have agreed with your study coordinator. Learners on more hours have a bigger maximum allowance. However the maximum allowance is only paid if you attend all your planned sessions. If you do not attend 100% your allowance is reduced to a session rate as shown below.

| Planned hours                | Maximum Bursary/Allowance per week | Session rate |
|------------------------------|------------------------------------|--------------|
| 12 or more sessions per week | £20                                | £1.25        |
| 6-11 sessions per week       | £15                                | £1.25        |
| up to 5 sessions per week    | £10                                | £1.25        |

- Learner A has a planned timetable of 14 sessions per week. They attend all 14 i.e. 100% attendance and receive £20 for full attendance.
- Learner B has a planned timetable of 14 sessions per week. They attend 12 sessions and are absent for 2 sessions. They receive £15.
- Learner C has a planned timetable of 7 sessions per week and is therefore part time. They attend 7 i.e. 100% attendance and they receive £15.

Bursary is not paid for:

- Holidays (including bank holidays during close down)
- Authorised absence (except short notice cancellation by WBTC)
- Sickness
- Other unauthorised absences

Evidence of attendance is through class registers for WBTC sessions and by you submitting a signed time sheet if you are on work placement. For travel to be paid, you must provide evidence e.g. bus or train tickets. The bursary is paid directly from WBTC and is normally paid directly to your bank account, together with any travel costs and the free meals allowance if you are eligible for this.

**How to apply – complete the attached application following the instructions carefully. You may need to ask a parent or guardian for help.**

A full version of the WBTC 16-19 Bursary Fund and Free Meals policy is available on our website.

# WBTC 16-19 Bursary Fund and Free Meals

## Application for Learners 2016-17

Learner name:..... Learner date of birth .....

Please tick the box or boxes that apply to you

|  |  |
|--|--|
| <b>I would like to apply for a Bursary (or WBTC funded allowance) in-line with WBTC's policy.</b> This payment is essential to help me access my training and help me to have good attendance. Without this Bursary I would not be able to attend regularly or achieve my course. I agree to inform those who pay me benefits or get benefits for me about my Bursary. <b>I agree to inform WBTC if my circumstances change in a way that might affect my Bursary.</b> |  |
| <b>I would like to apply for a free meals allowance</b>  |  |
| <b>I do not wish to apply for any financial assistance from Government or WBTC (NB if you tick this box you will <u>not</u> receive meals, travel or clothing assistance during your course)</b>   |  |

I declare that any evidence given in support of this application is correct and complete to the best of my knowledge and belief.

Learner signature: ..... Date:.....

**PLEASE COMPLETE EITHER BOX A here OR BOX B overleaf**

**BOX A** I am applying for a **Vulnerable Student Bursary** because I am

- A young person in care or a care leaver
- A young person claiming [Income Support](#) or [Universal Credit](#) in my own name
- Disabled and getting [Employment and Support Allowance](#) or [Personal Independence Payment](#) in my own name

Learners in these groups should circle the appropriate category and a member of WBTC should detail the supporting evidence here and attach a copy to this form

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**Note – young people in care or care leavers are not automatically eligible for free meals. If you wish to apply for this you need to complete box B as well. Young people on the benefits described in box A are eligible for free meals.**

**BOX B**

**I am applying for a discretionary bursary/free meal allowance (delete as appropriate)**

|  |  |                               |   |                              |   |   |
|--|--|-------------------------------|---|------------------------------|---|---|
| <b>Personal circumstances (please tick the appropriate box)</b>  |  |                               |   |                              |   |   |
| I live at home with family   | I live alone or with a friend or partner | I am in a hostel              | I am in supported lodgings                      | I don't have a fixed address |   |   |
| <b>Personal income (please complete the appropriate box)</b>   |  |                               |   |                              |   |   |
| I am not working<br>Claiming JSA YES/NO  |  |                               | I am working and my income is £..... per week   |                              |   |   |
| <b>Caring responsibilities</b>   |  |                               |   |                              |   |   |
| I am a parent YES/NO   |  |                               | I have to care for a member of my family YES/NO |                              |   |   |
| <b>Annual Gross Household Income (please tick the appropriate box and state the evidence provided)</b>   |  |                               |   |                              |   |   |
| Income less than £16,190 or In receipt of income-related state benefits as <u>ticked below</u> :   | Income £16,191 to £25,500                | Income £25,501 to £30,000     | Income £30,001 to £35,000                       | Income over £35,001          |   |   |
| Income support   | Income based JSA                         | Non income based JSA          | Universal Credit                                | Housing Benefit              | Child Tax Credit                          | Support under Immigration and Asylum act 1999 |
| Working Tax Credit   | Working tax credit run-on                | Personal independence payment | Income related Employment Support Allowance     |                              | Guarantee element of state pension credit |   |
| <b>Shaded boxes also count as evidence for free meals allowance. To be eligible for free meals you must tick one of the shaded boxes and provide evidence.</b> |  |                               |   |                              |   |   |
| I have provided the following evidence of household income/benefits (e.g. P60, letter from DWP or HMRC, Tax Credit letter)                                     |  |                               |   |                              |   |   |

**If you are unable to provide evidence due to particular circumstances, speak to the Great Start Team Leader.**

.....THIS SECTION IS FOR WBTC USE ONLY.....

|   | tick | notes                |
|---|------|----------------------|
| <b>Form complete and evidence supplied</b>                  |      |                      |
| <b>Form completed but no appropriate evidence supplied</b>  |      |                      |
| <b>Eligible for Vulnerable Student award</b>                |      |                      |
| <b>Flagged as vulnerable on attendance spreadsheet</b>      |      |                      |
| <b>Vulnerable Student Award applied for through SBSS</b>    |      | <b>Total award £</b> |
| <b>Code 55 entered on pics</b>                              |      |                      |
| <b>Eligible for Discretionary Award</b>                     |      |                      |
| <b>Code 56 entered on pics</b>                              |      |                      |
| <b>Maximum weekly amount from EFA discretionary bursary</b> |      | £                    |
| <b>Maximum weekly WBTC top up</b>                           |      | £                    |
| <b>Eligible for free meals allowance</b>                    |      | <b>YES</b> <b>NO</b> |
| <b>FME code entered on pics</b>                             |      |                      |

**I confirm that the application process for this learner has been completed**

**SIGNATURE.....DATE.....**

A full version of the WBTC 16-19 Bursary Fund and Free Meals policy is available on our website.