

# Bursary Fund Policy POL10

Author: R. Ashton	Version No: 12
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## 1. Introduction

- 1.1 Smart Training and Recruitment is committed to continuous quality improvement in all of its activities, particularly in terms of Learner achievement.
- 1.2 Our aim is to provide all Learners with equality of opportunity to access quality learning programs. The Company recognises its commitments under the law and is committed to providing equality of opportunity by aiming to ensure that its practices and procedures follow legal requirements in accordance with the Equality Act 2010.
- 1.3 The management of the Bursary Fund and its allocation to learners aged 16-19 on EFA-funded programs is auditable under its provision from the Education Funding Agency and therefore documents relating to the application and awards of monies will be maintained separately to that of the in-learning activities of such learners.
- 1.4 These procedures are to be read in conjunction with the Company's other policies and procedures

## 2. Application

- 2.1. This policy and procedure apply to all personnel working for Smart Training and Recruitment who are working with learners aged 16-19 on EFA-funded programs under learner responsive funded provision.

## 3. Scope

- 3.1 The Bursary Fund supports learners aged 16-19 and assessed as being in need of financial assistance on either full or part-time courses. The bursary fund is intended to help students with the essential costs of participating in their studies, so to help with the cost of essential books or equipment or with the cost of travelling to work placement for example. The bursary fund is not intended to support costs not related to education (living costs), extra-curricular activities or provide learning support – services that institutions give to students – such as counselling, mentoring or extra tutoring.
- 3.2 Above all, recipients must satisfy the eligibility criteria as stated in the EFA Bursary Funding Rules: <https://www.gov.uk/government/publications/16-to-19-bursary-fund-guide-2024-to-2025-academic-year>
- 3.3 The support fund does not support learners who are on a waged Apprenticeship program or who are receiving assistance from specified Government schemes.

## 4. Responsibility and Authority

- 4.1 The Bursary Support Fund lies with the Finance Manager and Director of Data & Compliance and is monitored by the Chief Executive and Managing Director
- 4.2 The Bursary Support Fund is administered in accordance with current Education Funding Agency Guidance and Smart Training and Recruitment's Policies and Procedures.

- 4.3 Learners who wish to appeal can do so in writing, giving details of any special circumstances that apply. The learners appeal will be investigated, and a decision confirmed in writing within ten working days.
- 4.4 Appeals should be addressed to the Director of Data & Compliance. If the matter is not resolved satisfactorily, then this will be forwarded to the Managing Director for further consideration.
- 4.5 **Learners are responsible for:**
- Making applications that are accurate in terms of information provided with provision of documentary evidence where required.
  - Complying with the Learning Agreement and Code of Conduct expected in terms of attendance, attitude to work and learning and behaviour.
  - Informing a member of the Operations Team if there any changes in the personal or financial circumstances.

**Operations Team Personnel are responsible for:**

- Assisting the learner to make an appropriate application.
- Ensuring the application is completed appropriately and that documentary evidence is provided or confirmed where required.
- Agreeing awards for Bursary Fund Support in line with policy, procedure and guidelines.
- Facilitating payment of awards with Finance Supervisor.

**Director of Data & Compliance (DQC) is responsible for:**

- Overseeing the administration of the fund via the Finance Manager.
- That the learners ILR is coded as a bursary recipient
- Acting as the first point of contact to receive any appeal.
- Ensuring the audit requirements are met.
- Producing reports on administration of the fund for the Directors and Education Funding Agency Audit Personnel as applicable
- Ensuring timely payments.
- Ensuring that the fund is publicised in an appropriate manner, via our website, <https://smarttar.co.uk/policies-procedures/>

## 5. Allocations

- 5.1 The 16 to 19 Bursary Fund provides financial support to help students overcome the specific financial barriers to participation they face so they can remain in education.

There are 2 types of 16 to 19 bursaries:

- i) bursaries for defined vulnerable groups
- ii) discretionary bursaries which institutions award using policies they set, in line with these funding rules

**Bursaries for defined vulnerable groups**

Students who meet the criteria, and who have a financial need, can apply for a bursary for vulnerable groups by raising this with their tutor who will supply an application form

(BF001) for completion. Section 4 “ADDITIONAL FINANCIAL SUPPORT” should be completed – the tutor, in conversation with the learner, must describe the reason for this Additional Financial Support request in this section. Evidence to support must be attached, where deemed relevant. The defined groups reflect that these students are unlikely to be receiving financial assistance from parents or carers, so may need a greater level of support to enable them to continue to participate. Applications will be assessed and if successful, students will be awarded the amount of support they need to participate based on an assessment of the types of costs they have and will not be automatically awarded the maximum £1,200.

The defined vulnerable groups are students who are:

- i) in care
- ii) care leavers
- iii) receiving Income Support (IS), or Universal Credit (UC) because they are financially supporting themselves or financially supporting themselves and someone who is dependent on them and living with them, such as a child or partner.
- iv) receiving Disability Living Allowance (DLA) or Personal Independence Payments (PIP) in their own right as well as Employment and Support Allowance (ESA) or UC in their own right.

The 16 to 19 Bursary Fund defines ‘in care’ as children looked after by a local authority on a voluntary basis (section 20 of the Children Act 1989) or under a care order (section 31 of the Children Act 1989). Section 22 of the Children Act 1989 defines the term ‘looked after child’. A ‘care leaver’ is defined as: a young person aged 16 and 17 who was previously looked after for a period of 13 weeks consecutively (or periods amounting to 13 weeks), which began after the age of 14 and ended after the age of 16; or a young person aged 18 or above who was looked after prior to becoming 18 for a period of 13 weeks consecutively (or periods amounting to 13 weeks), which began after the age of 14 and ended after the age of 16

### **Discretionary bursaries which institutions award using policies they set, in line with these funding rules**

We will make discretionary bursary awards to help students with the cost of travel, to buy essential books, equipment, or specialist clothing (such as protective overalls or boots for example). These are items the student would otherwise need to pay for to participate. We will use the bursary fund in individual cases of severe hardship, to provide food support whilst a student attends their study program, for a student they consider to be in real need. Discretionary bursaries are detailed within Section 3: “WEEKLY AGREED BURSARY” of the application form (BF001) and a fair payment to assist will be made by the trainee’s tutor based on information provided by the trainee.

## **6. Awards**

### **Discretionary Bursary:**

- 6.1 We will not use the bursary to provide a “flat fee” to each participating student, individual analysis of each participants circumstances must be applied in order to confirm the award to be made.

## 7. Payments

- 7.1 All payments will be made via BACS directly to the Learner's bank account on a weekly basis in arrears. Bank account details are confidentially collected via the application form (BF001)
- 7.2 Payments are made at the discretion of the Finance Manager who may seek advice from the Director of Data & Compliance where required, however this is not mandatory. Decisions will be based upon information supplied from administrative or operations team personnel regarding attendance.
- 7.3 Exceptional cases and contingency fund allocations can be made at the discretion of the Director of Data & Compliance to respond to a genuine need not identified through our standard approach.

## 8. Process

- 8.1 Applicant is made aware of both types of Bursary Fund Support available through provision of information, advice and guidance and monthly reviews.
- 8.2 For **defined vulnerable groups** applications: Student is supported by Training Team Personnel to complete Bursary Fund Application Form, **form BF001**, sections 1 to 5, and collate required documentary evidence and return to Operations Team personnel.
- 8.3 Application for Bursary Fund Support is scanned and emailed to Finance Manager by Operations Team personnel to review and ascertain award level upon receipt of documentary evidence from applicant.
- 8.4 Confirmation of award allocation is recorded on Bursary Fund Application Form **form BF001**, in section 6b, by Finance Manager.
- 8.5 Confirmation of full, amended, and withheld payments to learners awarded discretionary payments to be collated by Finance Manager on a weekly basis.
- 8.6 The Finance Manager is to make BACS to payments to learners as per Bursary Fund Weekly Payment Schedule by close of business each Wednesday for the previous week's confirmed award allocations.

## 9. Data Collection and Audit Requirements

- 9.1 Application forms, Assessment Records and supporting documentary evidence are to be held securely to meet the needs of monitoring and audit requirements and in line with data protection legislation.
- 9.2 Bursary Fund administration is to be held separately from that of in- learning activity.
- 9.3 Bursary Fund Accounts are to run from 1st August to 31st July.
  - *Records will be retained in line with the Smart Training and Recruitment's Document Retention Policy.*

9.4 An annual return is to be made by the Director of Data & Compliance upon request from the Education Funding Agency in line with data collection of awards made in the contract year. These are most likely to request (but not limited to):

- Total number of Level 1 (Higher rate bursary) learners in the last year.
- Total number of Level 1 (Higher rate bursary) eligible learners in this year currently on programme.
- Totals for Discretionary Payments for last year (amounts of awards, total numbers of learners receiving awards and total amount per learner)

9.5 An in-year return is to be made by the Director of Data & Compliance upon request (usually November and/or February and/or May) from the Education Funding Agency in line with data collection of total number of learners eligible for higher rate bursary in the current contract year.

## 10. Contacts/Key Personnel

### **Managing Director & Registered Office:**

Jan Hopkinson ([jan@smarttar.co.uk](mailto:jan@smarttar.co.uk))

### **Chief Executive:**

Dean Hopkinson ([dean@smarttar.co.uk](mailto:dean@smarttar.co.uk))

### **Director of Data & Compliance**

Rich Ashton

([rich.ashton@smarttar.co.uk](mailto:rich.ashton@smarttar.co.uk))

### **Finance Manager:** Angela Smith

([angela.smith@smarttar.co.uk](mailto:angela.smith@smarttar.co.uk))

### **Registered Office:**

Smart Training and Recruitment Ltd.

Suite 18 - Mill Court Business Centre

Furrlongs Newport

Isle of Wight

PO30 2AA