# Financial Support & Bursary Policy

# Learning Services Worcestershire

August 2024-2025

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Approved By	Learning Services Governing Body
Date Approved	22 <sup>nd</sup> September, 2022
Next Review Date	1 <sup>st</sup> August, 2025
Version Information	V1 – Created August 2022
	V2 – Updated January 2025







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### **Section 1: Introduction**

Learning Services Worcestershire provides accessible opportunities for learning to residents across the whole of Worcestershire. We are therefore committed to removing barriers to participation where they exist, including those of a financial nature. All financial support funds are designed to help with the costs of taking part in education where learners would otherwise not be able to afford to do so. Funds are not designed to supplement normal daily expenses and Learning Services Worcestershire must ensure that the funds go to those who genuinely need them.

For 19+ Adult Learning, this policy should be read alongside our 19+ Fees Policy, which explains more about the different programmes we offer, and the fees and charges associated with them.

At all ages, the policy should also be read in conjunction with the application form for the bursary fund you are applying to access.

If you would like help with making an application, you can:

- Speak to your tutor
- Call 01905 728537
- Email <u>youngadultlearning@worcestershire.gov.uk</u> (for 16-19 enquiries)
- Email <u>adultlearning@worcestershire.gov.uk</u> (for 19+ enquiries)

#### 1.1 Types of financial support available

Our different programmes offer access to different financial support. If you are unsure which is the right fund for you, please contact us for advice.

#### 1) 16-19 Bursary Fund

For learners accessing 16-19 Education, including those aged 19-24 accessing 16-19 Education with an EHCP (discretionary bursary only for 19-24)

#### 2) ASF Discretionary Learner Support Fund

For learners accessing 19+ qualification programmes up to Level 2 and those accessing Level 3 qualifications via Legal Entitlement

- 3) Advanced Learner Loans Bursary Fund For learners financing their studies via Advanced Learner Loans
- 4) Tailored Learning Bursary Fund For learners accessing 19+ non-accredited courses

#### 1.2 Additional forms of support

Learning Services Worcestershire is able to meet the cost of putting in place a reasonable adjustment, as set out in the Equality Act 2010, for learners who have an identified difficulty and/or disability, so that they can achieve their learning goal. Requests in line with reasonable adjustments are not considered financial support within our 16-19 and 19+ Skills and Qualifications programmes up to Level 2. For these programmes, support is considered separately to this policy and guidance. Please







contact us for more details. For Advanced Learner Loans, the bursary scheme is used to support the provision of reasonable adjustments and is covered within that section of this policy.

#### 1.3 How decisions are made

Applications to all bursary funds will be overseen by the Business Support Team and decisions about awards will be made with the approval of the relevant member of the Learning Services Worcestershire management team.

Decisions about which applications are supported and to what value will be made based on each learner's individual circumstances and their actual financial need, aligned to government guidance. These will vary from learner to learner depending on, for example, their household income, the distance they need to travel to access their learning, and the requirements of their programme.

Learners must meet the age and residency criteria to be eligible for help from the relevant bursary fund.

Payments cannot be made retrospectively so prompt application is advised once a need for support is identified. Decisions are made within 10 days of an application being received, subject to all the supporting evidence also being received. Entitlement begins from the date that a decision is made and an award letter is issued.

#### 1.4 General eligibility and conditions

- 1) Learning Services Worcestershire is allocated funding by the Education and Skills Funding Agency (ESFA) to aid learners funded by the ESFA. Learners are advised to apply early as funding is limited.
- 2) Learners are eligible to apply for funding if they meet both the requirements for ESFA funding, as stated in the ESFA Funding Rules for the course they are undertaking, and any additional eligibility rules specific to the Bursary Fund they are applying to.
- 3) Applications for financial support will be accepted throughout the academic year or until the funding has been fully allocated, whichever is sooner. Awards cease at the end of each academic year, or sooner if stated in the Award letter. However, please note that awards and associated payments cannot be backdated.
- 4) All requests for support are reviewed on a case-by-case basis.
- 5) Applications will be dealt with on a strict date-received basis and this will be dependent on all paperwork being fully completed with all the necessary accompanying documentation. Incomplete applications cannot be considered and will be returned to applicants.
- 6) Eligibility does not mean an entitlement as funds are limited. No guarantee can be given that funds will be available when you apply.
- 7) If there is a high demand on the funds, awards may be given at a reduced rate.







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- 8) Funding support awards are always conditional on learners remaining on the course, maintaining good attendance, actively participating and making reasonable progress. For the purposes of financial support, good attendance is considered to be attendance in full at 85% or more of the available sessions. Where learners consistently arrive late or leave sessions early, this will be taken into account when considering their entitlement to continue receiving financial support.
- 9) If a learner does not meet the minimum attendance rate then award payments may be suspended or refused. However, the learner will be provided with an opportunity to submit any extenuating circumstances for consideration.
- 10) Funding support awards are also conditional on learners complying with the Learning Services Worcestershire code of conduct, and that of any subcontracted learning provider (where appropriate). Learners who do not meet these conditions may be required to return equipment, resources and any funding support they have received.
- 11) Awards will be made in accordance with the published guidance in the Funding Rules from the ESFA.
- 12) Awards for financial support are made on the basis of an identified need, but actual payments must be supported by evidence of expenditure. The value of the award is not usually the same as the eventual amount reimbursed as the award value usually differs from actual expenditure. Reimbursement will only be made up to the annual allocation amount stated in the award decision.







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#### Section 2: 16-19 Bursary Fund

If your eligibility has been confirmed and you are accessing, or will be accessing, 16-19 Education with Learning Services Worcestershire then you may also be eligible for financial support alongside your programme.

#### 2.1 Bursary Elements

There are three funds within the 16-19 Bursary that applications can be made to:

- 1) 16-19 Vulnerable Learner Bursary
- 2) 16-19 Discretionary Bursary
- 3) 19-24 Discretionary, if continuing on a study programme or have an EHCP
- 4) 16-18 Free Meals

#### 2.2 Vulnerable Learner Bursary (Student Bursary Support Service)

The Student Bursary Support Service (SBBS) can be used to draw down additional funding for students on the 16-19 Bursary who are part of a defined vulnerable group.

#### 1) Eligibility

To be eligible for a Vulnerable Learner Bursary of up to £1,200 per year, you must be on a programme of 30 weeks or more and in one of the following defined groups:

- In Care, or classed as a "Looked After Child" by the Local Authority
- Care Leaver
- Receiving Income Support (IS) or Universal Credit (UC) because you are financially supporting yourself, or financially supporting yourself and someone who is dependent on you and living with you, such as a child or a partner
- Receiving Disability Living Allowance (DLA) or Personal Independence Payments (PIP) in your own right, as well as Employment Support Allowance (ESA) or Universal Credit (UC) in your own right

If you are on programme less than 30 weeks then the amount you are eligible to receive will be pro-rata.

#### 2) Evidence Requirements

- If you are In Care or are a Care Leaver, written confirmation of your current or previous looked-after status from the relevant Local Authority or Social Worker
- If you are in receipt of Income Support or Universal Credit, a copy of an in-date Income Support or Universal Credit award notice
- If you are receiving Universal Credit or Employment Support Allowance and Disability Living Allowance or Personal Independence Payments, a copy of the UC claim from DWP. Evidence of receipt of DLA or PIP must also be provided







#### 2.3 Discretionary Bursary

The Discretionary Bursary can financially support you if you do not qualify for the Vulnerable Learner's Bursary but still have financial support needs.

This support is based on household income and can support a need which arises at any time during your programme, resulting from a sudden change in circumstances such as redundancy in the family, a sudden drop in income or family breakdown, etc.

Each application is income-assessed and based on relevant financial need. The amount of the bursary award will be determined by your individual need and the funds available. You may be assisted with:

- Transport
- Stationery and equipment
- Lunch
- Clothing for work experience

Funds may also support other needs, subject to approval.

1) Eligibility

To be eligible for a Discretionary Learner Bursary, your total household income must be less than £35,000 per annum, including any benefits and earnings.

- 2) Evidence Requirements
  - Letter of confirmation from DWP regarding receipt of any benefits, including Income Support, Income-Based Job Seekers Allowance, Employment and Support Allowance or Universal Credit
  - Letter of confirmation from HMRC regarding any Tax Credit
  - Letter of confirmation from your local council detailing any Housing or Council Tax benefit
  - Letter of confirmation regarding your DLA or PIP or Carer's Allowance
  - Previous 3 months of Universal Credit award notice
  - Copy of P60 or audited accounts, if self-employed

#### 2.4 Care to Learn

Care to learn (C2L) provides funding for childcare to help young parents (defined as those aged under 20) continue in education after the birth of a child. The scheme provides funding for childcare while the young parent is engaged in a study programme and is not able to provide care for their child. It can also help the young parent with any additional travel costs involved in taking the child to the childcare provider. C2L can provide a maximum of £180 per week for the 24/25 academic year.

To be eligible the young parent must meet ALL the following criteria:

- under 20 years old on the date they start their study programme.
- the main carer and receiving Child Benefit for the child(ren) for whom they are claiming C2L.
- the other parent is unable to provide childcare, for example, they are also in education or are absent.
- the other parent is not claiming childcare paid through any other source, for example, government funded early education places or Childcare Tax Credits.
- Living and studying in England.
- Residency meet the criteria for ESFA funding regulations for post-16 provision.







It is important to note it is the young parent who first applies for C2L, not the education institution or childcare provider. This can be done at <u>Student Bursary Support Service</u>.

Once the young parent has submitted their application, the education institution will be contacted by the SBSS to provide further details to confirm the course or study programme details. After the education institution has completed their part of the application, SBSS will contact the childcare provider and ask them to confirm the childcare requirements.

Once all 3 parties have completed their part of the process, the SBSS will assess the application to determine eligibility. If successful SBSS will confirm the outcome to the young parent, childcare provider, education institution and will issue a payment plan to the young parent via the SBSS online portal.

For support with their application, young parents can call the SBSS student helpline on 0800 121 8989.

#### 2.5 Free Meals Allocation

The Further Education Free Meal fund is similar to Free School Meals, but for those who are 16 or over, but under 19, on 31 August 2024. Learners aged 19 or over at the start of their programme are not eligible unless they have an EHCP. Learners who turn 19 during their programme can continue to receive Free Meals, so long as they remain eligible. If you are entitled to a Further Education Free Meal, you will receive a payment or vouchers towards the cost of your lunch if you attend training for a full day. Alternatively, at some training centres you may receive a paid-for meal instead of a payment.

#### 1) Eligibility

To be eligible for Free Meals, you (if living independently) or your parents (if you are living with them) must receive one or more of the following benefits:

- Income Support
- Income-Based Job Seekers Allowance
- Income-related Employment and Support Allowance (ESA)
- Support under part VI of the Immigrations and Asylum Act 1999
- The guarantee element of State Pension Credit
- Child Tax Credit (provided not entitled to Working Tax Credit and with an annual gross income of no more than £16,190, as assessed by HMRC)
- Working Tax Credit run-on (but not Working Tax Credit itself)
- UC with net earnings not exceeding the equivalent of £7,400 for each year (after tax and not including any benefits received)

If you received Free School Meals when you were at school but do not meet the eligibility criteria as above, please speak to us. There are some additional criteria which can be considered if you believe that your household circumstances have not significantly changed and the move to Universal Credit may have affected your eligibility.

#### 2) Evidence Requirements

• Letter of confirmation from DWP regarding receipt of any benefits, including Income Support, Income-Based Job Seekers Allowance, Employment and Support Allowance or Universal Credit







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- Letter of confirmation from HMRC regarding any Tax Credit
- Previous 3 months Universal Credits award notice
- Letter to confirm support under Part VI of the Immigration and Asylum Act 1999.

#### 2.6 Eligibility for 16-19 Bursaries for Young Offenders

As a Young offender, you can apply for a bursary if you meet the eligibility criteria and:

- Are serving a non-custodial sentence
- Have been released early from a custodial sentence (except on temporary licence)
- Have been remanded at a non-secure institution

Even if eligible, you cannot apply for a bursary if:

- You are serving a custodial sentence
- You have been released from a custodial sentence on temporary licence
- You have been remanded at a secure institution

#### 2.7 Principles of support

If you raise a need for additional support to access learning, the Learning Services Worcestershire Business Support staff, or another representative of the team, will speak with you to discuss your needs. Wherever possible, solutions that do not require an application for financial support to the Bursary Fund will be identified and implemented. These may be solutions such as moving you to a course at a more accessible location or assisting an application for childcare funding.

In all cases, Learning Services Worcestershire are obliged to ensure that all appropriate support is being accessed from other sources, prior to awarding 16-19 Bursary payments. For example, learners may be able to access childcare funding from mainstream sources or make an application via Care2Learn - see <u>Childcare Choices</u>.

Decisions will also reflect the most cost-effective and suitable way of meeting an identified need. For example, if you require support with travel then we will give consideration to the length of the journey you need to take and things such as whether single-ticket reimbursement or provision of a bus pass is most appropriate – also taking into consideration the staff time which would be involved in processing different methods of support.

Where financial support is provided by Learning Services Worcestershire, it is your responsibility to tell the Department for Work and Pensions about any Bursary Funding you receive, as payments may affect your eligibility for state benefits.

#### 2.8 Award values

If you qualify for the Free Meals initiative and a bursary, an allocation will be made based on combined funding. Annual allocations will be made aligned to household income bands as follows:







Banding	Household Income	Maximum Annual Allocation	
A	Vulnerable Learner Status	£1,440	
В	Below £24,999	£1,320	
С	£25,000 to £29,999	£1,200	
D	£30,000 to £34,999	£1,080	

The above allocations are based on a full-time, full-year programme of 30 weeks or more. If you meet the criteria and are on a programme lasting for less than 30 weeks you will receive an allocation based on a pro-rata amount (with the actual amount dependent on the specific financial needs you have).







## Section 3: ASF Discretionary Learner Support Fund (DLSF)

If your eligibility has been confirmed and you are accessing, or will be accessing, a 19+ qualification at Level 2 or below with Learning Services Worcestershire then you may also be eligible for financial support alongside your programme. You may also be eligible if you are aged 19-23 and are accessing a Level 3 programme under Legal Entitlement.

#### 3.1 Support categories

Learning Services Worcestershire offers Discretionary Learner Support from three categories:

- Hardship Funding
- 20+ Childcare Funding
- ICT Devices and Connectivity

The Discretionary Learner Support Fund can help you with a contribution towards the cost of travel, educational visits, books and equipment needed for your course (where these are not already provided as part of your course). The fund can also assist with childcare in some circumstances, and it may also be possible to provide access to technology that is essential for participation.

There is also a limited fund to assist with tuition fees for those who are not eligible for a fee reduction.

#### 3.2 Eligibility for support

ASF Discretionary Learner Support is based on household income and can support a need which arises at any time during your programme, resulting from a sudden change in circumstances such as redundancy in the family, a sudden drop in income or family breakdown, etc.

Each application is income-assessed and based on relevant financial need. The amount of the bursary award will be determined by your individual need and the funds available. You may be assisted with expenses such as:

- Transport
- Stationery and equipment
- Personal Protective Equipment or other relevant clothing for vocational courses

Funds may also support other needs, subject to approval.

1) Eligibility

To be eligible for a Discretionary Learner Support Bursary, your total household income must be less than £35,000 per annum, including any benefits and earnings.

#### 2) Evidence Requirements

- Letter of confirmation from DWP regarding receipt of any benefits, including Income Support, Income-Based Job Seekers Allowance, Employment and Support Allowance or Universal Credit
- Letter of confirmation from HMRC regarding any Tax Credit
- Letter of confirmation from your local council detailing any Housing or Council Tax benefit
- Letter of confirmation regarding DLA or PIP or Carer's Allowance







- Previous 3 months of Universal Credit award notice
- Copy of P60 or audited accounts, if self-employed

#### 3.3 Principles of support

If you raise a need for additional support to access learning, the Learning Services Worcestershire Business Support Staff, or another representative of the team, will speak with you to discuss your needs. Wherever possible, solutions that do not require an application for financial support to the Discretionary Learner Support Fund will be identified and implemented. These may be solutions such as moving you to a course at a more accessible location and/or supporting online access to reduce the burden of travel, registering you with the Good Things Foundation Databank to aid online connectivity, or assisting an application for childcare funding.

In all cases, Learning Services Worcestershire are obliged to ensure that all appropriate support is being accessed from other sources, prior to awarding Discretionary Learner Support. For example, many learners are able to access childcare funding from mainstream sources and shouldn't need to make an application to DLSF in order to access the part-time courses we offer - see <u>Childcare Choices</u>.

Decisions will also reflect the most cost-effective and suitable way of meeting an identified need. For example, if you require support with travel then we will give consideration to the length of the journey you need to take and things such as whether single-ticket reimbursement or provision of a bus pass is most appropriate – also taking into consideration the staff time which would be involved in processing different methods of support.

Where financial support is provided by Learning Services Worcestershire, it is your responsibility to tell the Department for Work and Pensions about the Learner Support Funding you receive, as payments may affect your eligibility for state benefits.

#### 3.4 Award values

Banding	Banding Household Income Maximu	
A	Vulnerable Learner Status	£1,440
В	Below £24,999	£1,320
С	£25,000 to £29,999	£1,200
D	£30,000 to £34,999	£1,080

Annual allocations will be made aligned to household income bands as follows:

The above allocations are based on a full-time, full-year programme of 30 weeks or more. Most Learning Services Worcestershire qualifications at 19+ are studied on a part-time basis. Therefore, allocations are based on a pro-rata amount (with the actual amount dependent on the specific financial needs you have).

More than one application may be submitted (to allow for changes in circumstances throughout the year) and all requests for financial assistance will be considered. However, it may not always be possible to allocate funding.







## Section 4: Advanced Learner Loans Bursary Fund (ALLBF)

If you have been approved for an Advanced Learner Loan to fund your studies on a Learning Services Worcestershire programme, you may also be eligible for financial support alongside your programme.

#### 4.1 Support categories

Learning Services Worcestershire offers Learner Support from three categories:

- Learning Support and the provision of reasonable adjustments
- Hardship Funding
- 20+ Childcare Funding

The Advanced Learner Loans Bursary Fund can help you with a contribution towards the cost of travel, educational visits, books and equipment needed for your course (where these are not already provided as part of your course). The fund can also assist with childcare in some circumstances.

As the Advanced Learner Loan is used to finance the tuition fees, there is no bursary support for this.

#### 4.2 Eligibility for support

Access to the Advanced Learner Loan Bursary Fund is based on either an agreed need to meet the cost of putting in place a reasonable adjustment, as set out in the <u>Equality Act 2010</u> or to support a need arising from financial hardship. Needs may arise at any time during your programme, resulting from a sudden change in circumstances such as redundancy in the family, a sudden drop in income or family breakdown, etc.

Hardship and childcare applications are income-assessed and based on relevant financial need. The amount of the bursary award will be determined by your individual need and the funds available. You may be assisted with expenses such as:

- Transport
- Stationery and equipment
- Personal Protective Equipment or other relevant clothing for vocational courses

Funds may also support other needs, subject to approval.

#### 1) Eligibility

To be eligible for an Advanced Learner Loan Bursary:

- Your total household income must be less than £35,000 per annum, including any benefits and earnings (unless your application relates to a reasonable adjustment)
- Your loan must have been approved by the Student Loans Company and you must have passed what is known as the "liability point" (our staff can advise on this)
- You should claim under either the Discretionary Learner Support Fund (for Level 2 qualifications) OR the Advanced Learner Loans Bursary Fund, if you have costs which are relating to courses at both levels (again, our staff can help advise on this)

If you are Released on Temporary Licence, then you are not eligible to access the Advanced Learner Loan Bursary Fund.







#### 2) Evidence Requirements

- Letter of confirmation from DWP regarding receipt of any benefits, including Income Support, Income-Based Job Seekers Allowance, Employment and Support Allowance or Universal Credit
- Letter of confirmation from HMRC regarding any Tax Credit
- Letter of confirmation from your local council detailing any Housing or Council Tax benefit
- Letter of confirmation regarding DLA or PIP or Carer's Allowance
- Previous 3 months of Universal Credit award notice
- Copy of P60 or audited accounts, if self-employed

#### 4.3 Principles of support

If you raise a need for additional support to access learning, the Learning Services Worcestershire Business Support staff, or another representative of the team, will speak with you to discuss your needs. Wherever possible, solutions that do not require an application for financial support to the Advanced Learner Loan Bursary Fund will be identified and implemented. These may be solutions such as moving you to a course at a more accessible location and/or supporting online access to reduce the burden of travel, registering you with the Good Things Foundation Databank to aid online connectivity, or assisting an application for childcare funding.

In all cases, Learning Services Worcestershire are obliged to ensure that all appropriate support is being accessed from other sources, prior to awarding a bursary. For example, many learners are able to access childcare funding from mainstream sources and shouldn't need to make an application to ALLBF in order to access the courses we offer - see <u>Childcare Choices</u>.

Decisions will also reflect the most cost-effective and suitable way of meeting an identified need. For example, if you require support with travel then we will give consideration to the length of the journey you need to take and things such as whether single-ticket reimbursement or provision of a bus pass is most appropriate – also taking into consideration the staff time which would be involved in processing different methods of support.

Where financial support is provided by Learning Services Worcestershire, it is your responsibility to tell the Department for Work and Pensions about the Learner Support Funding you receive, as payments may affect your eligibility for state benefits.

#### 4.4 Award values

Banding	Banding Household Income Maximun	
А	Vulnerable Learner Status	£1,440
В	Below £24,999	£1,320
С	£25,000 to £29,999	£1,200
D	£30,000 to £34,999	£1,080

Annual allocations will be made aligned to household income bands as follows:

The above allocations are based on a full-time, full-year programme of 30 weeks or more. Most Learning Services Worcestershire qualifications at 19+ are studied on a part-time basis. Therefore







allocations are based on a pro-rata amount (with the actual amount dependent on the specific financial needs you have).

More than one application may be submitted (to allow for changes in circumstances throughout the year) and all requests for financial assistance will be considered. However, it may not always be possible to allocate funding.







# Section 5: Tailored Learning Bursary Fund (TLBF)

The Tailored Learning Bursary Fund is a very limited fund which supports those in greatest need to access a further reduction in course fees. If you are not eligible for concessions under the advertised criteria, or you are eligible for a concession but cannot afford the reduced rate, then you can make an application to this fund.

#### 5.1 Eligibility for support

Many situations are already covered by our concessions offer for Tailored Learning, but the bursary fund is designed to bridge the gap for needs outside of those which are already supported. Examples of need may be a sudden change in circumstances such as redundancy in the family, a sudden drop in income, a recent family breakdown or ill health.

Applications for fees to be reduced or waived due to financial difficulty may be awarded in two circumstances:

- If you have been referred by a professional body (such as the Hereford & Worcestershire Wellbeing and Recovery College, Job Centre Plus, Starting Well, a school, a GP or a Social Prescriber)
- If you can identify that attendance on the course will have a significant impact on your employment prospects

Applications should be made on a good-faith basis as they are designed to cover situations which may be difficult to evidence. However, any evidence which you wish to provide with your application will usually make it easier for us to understand your circumstances and to provide support. Your application will require a personal statement alongside any other evidence you provide.

#### 5.2 Principles of support

If you raise a need for additional support to access learning, the Learning Services Worcestershire Business Support staff, or another representative of the team, will speak with you to discuss your needs. Wherever possible, solutions that do not require an application for financial support to the Tailored Learning Bursary Fund will be identified and implemented.

#### 5.3 Award values

In most circumstances, the maximum award under the Tailored Learning Bursary Fund will be a reduction in fees for up to three courses per academic year.







## Section 6: Childcare

Any financial assistance provided for childcare is only available for the timetabled hours of your course. To claim support, you must be using an Ofsted-registered childcare provider and not be in receipt of childcare support from any other agency.

Payments for childcare will be based on your attendance and excludes childcare costs outside term time. If you withdraw from the course or have payments stopped due to poor attendance, you will be responsible for the payment of outstanding fees to the childcare provider.

Applications to cover childcare for more than two children will only be considered in exceptional circumstances. As detailed elsewhere, Early Years Education Entitlement must be used before making a claim for childcare support.

Childcare support cannot be used to pay for:

- Christmas, Easter and Summer holiday periods and periods of Half Term
- Deposits, retainers, or to make advance payments
- Food for your child

Payments may also be withheld if you change the number of days or hours your child attends their setting and you fail to inform the Business Support Team.

Note – Childcare for learners up to the age of 20 follows different rules. Please see section 2.4 for more information.

#### Section 7: Appeals Procedure

If you have concerns regarding the decision made on your application for Financial Support, please appeal in writing to the Service Manager, Anna Lee, at <u>adultlearning@worcestershire.gov.uk</u>.

Support from the funds described in this document is not guaranteed.

All information is correct at the time of going to print but may be subject to change and alteration (August 2024).

Learning Services Worcestershire reserves the right to alter or amend this policy at any time, particularly where there is an arising need in line with the requirements of the Education and Skills Funding Agency (ESFA).











# Young Adult Learning Support Allowance Form 2024/2025

# Please complete ALL details in full with supporting ORIGINAL financial evidence (all pages). If you need further information or help completing the application, please contact the Business Support Officer on 01905 728537

Please complete ALL sections:				
Section 1: Student's Personal Details				
Surname:				
First Name(s):				
Date of Birth:				
Provider:				
Address:				

#### Section 2: Eligibility for a Vulnerable Learner Bursary

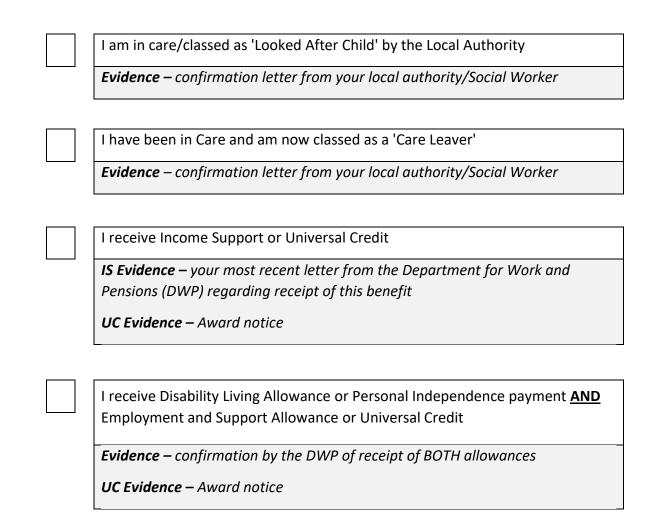
You could be entitled to a Bursary of up to £1,200 a year if you are in care, care leaver, receiving Income Support or Universal Credit in your own right or receiving Disability Living Allowance or Personal Independence payment AND Employment Support Allowance or Universal Credit in your own right whilst financially supporting yourself or someone who is dependent on you and living with you, such as a child or partner.

Please tick any that apply:









If you have ticked any of the categories above you **DO NOT** need to fill in Section 3 of this form. Please continue to section 4 (declaration).

#### Section 3: Eligibility for a Discretionary Bursary

In order to be eligible for the Discretionary Bursary, your total household income must be less than £35,000 per annum including any benefits and earnings.

The Bursary Administrator will assess your eligibility for the Discretionary Bursary in line with its own policies, available funding and your financial need. Please complete the following section as fully as you can, and ask for help if you need it. Your need will be assessed and there is no guarantee that you will be eligible for the bursary.









3.1		Do you, or your parent/carer's that you live with, receive any means-tested state benefits?		
		please tick below which means-tested benefit applies to you or your parents/carer		

Income Support

**Evidence** – your most recent letter from the Department for Work and Pensions (DWP) including whole income

Universal Credit

**Evidence** – Previous 3 months award notices. Please provide all pages of each months award notice.

Income-based Job Seeker's Allowance/Employment and Support Allowance

*Evidence* - your most recent letter from the Department for Work and Pensions (DWP)

Working Tax Credit/Child Tax Credits

**Evidence** – <u>ALL</u> pages of your most recent Tax credit award letter from HM Revenue & Customs

Housing Benefit/Council Tax Benefit

**Evidence** – Award letter from the Council for the financial year

Disability Living Allowance or Personal Independence Payment/Careers Allowance

**Evidence** – your most recent letter from the Department for Work and Pensions (DWP)















YES NO

Any other	benefits
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#### Please state:

*E.g. Support under part VI of the immigration & Asylum Act 1999 etc.* 

		You	Parents /Carer
3.2	If you answered 'yes' to question 3.1 above, please indicate who receives these benefits?		

3.3	If your parent/carers are in Employment please provide evidence of income in the form of a <u>P60</u> or equivalent.

	Please tick what type of support required:	
	Meals Stationery and Equipment (needed for the course	
3.4	and not supplied by the Training Provider) Travel Costs (If you need to use public transport	
	and cannot walk or cycle to your training centre). Work Experience appropriate Clothing (where employers require specific items you do not own)	
	Other miscellaneous items (Trip Costs, DBS Checks)	

If you have not enclosed copies of the appropriate evidence, it will not be possible to process your application and it will be returned to you. This could result in unnecessary delays to processing your application.







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#### Section 4: Declaration

#### By signing in the box below:

#### YOU UNDERSTAND THAT:

- All evidence must be received within **6 weeks** of starting the programme to qualify for back payment
- Any attempt to dishonestly obtain a bursary shall be treated as fraud that will be subject to disciplinary procedures
- If you leave before the bursary is processed, NO bursary payments will be paid
- The relevant attendance criteria must be met before we can make a payment

#### YOU CONFIRM THAT:

- You have read the 16-19 Bursary Fund Policy 2024/25
- The information given on the form is to the best of your knowledge is correct and true at the time of application AND that I will inform the Business Support Officer immediately of any change in circumstances

#### YOU AGREE THAT:

- You are happy for all aspects of your bursary to be discussed with you Parent/Carer
- Young Adult Learning can process your personal data contained in this form to assess your eligibility for the 16-19 bursary fund. If you have given personal information relating to anyone else on this form you have obtained their permission to disclose it

Confidentiality: Applications are only seen by staff involved in the delivery of Young Adult Learning

Signature:	Print Name:
Date:	

Please submit the completed, signed Application Form and supporting evidence to – Young Adult Learning, The Fairfield Centre, Carnforth Drive, Worcester, WR4 9HG

#### **OFFICIAL USE ONLY**

Date application received:	Business Support Officer Signature:











# ASF Discretionary Learner Support Fund

**Application Form** 

**REVISION DATE: August 2024** 

Please complete ALL details in full, and supply copies of financial evidence (all pages please). If you need further information or help completing the application, please contact the Business Support Officer on 01905 728537 or

adultlearning@worcestershire.gov.uk.







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#### **SECTION 1: INTRODUCTION**

# It is important that you read these notes before you submit your claim for support from the ASF Discretionary Learner Support Fund.

1.1. Allocation of a Bursary is subject to the availability of funds from the Education & Skills Funding Agency and a Bursary allocation cannot be guaranteed to be awarded to all learners who meet the criteria. The financial support you are awarded whilst you are on a course with Worcestershire Adult Learning Services, does not guarantee financial support for any subsequent courses that you may progress on to. It is a limited fund and will be reviewed on a regular basis.

1.2. If you raise a need for additional support to access learning, a representative of the Learning Services Worcestershire Team will speak with you to discuss your needs. Wherever possible, solutions that do not require an application for financial support to the ASF Discretionary Learner Support Fund will be identified and implemented.

1.3. Where financial support is provided by Learning Services Worcestershire, it is your responsibility to tell the Department for Work and Pensions about the Learner Support Funding you receive, as payments may affect your eligibility for state benefits.

1.4. If you are applying for a **Discretionary Bursary** award you must be able to provide evidence that demonstrates you are in receipt of a means tested benefit and/or your household income is less than £35,000 per annum.

1.5. To receive your Bursary Allocation, you **MUST** have an 85% attendance rate at your Training Provider/Placement – if you do not attend you will not be entitled to the nominal daily allocation for that day.

#### SECTION 2: DISCRETIONARY BURSARY

2.1. Access to the Discretionary Bursary Fund is based on either an agreed need to meet the cost of putting in place a reasonable adjustment, as set out in the Equality Act 2010 or to support a need arising from financial hardship.

2.2. Needs may arise at any time during your programme, resulting from a sudden change in circumstances such as redundancy in the family, a sudden drop in income or family breakdown, etc. Hardship and childcare applications are income-assessed and based on relevant financial need.

2.3. The amount of the bursary award will be determined by your individual need and the funds available. You may be assisted with expenses such as:

- Transport
- Stationery and equipment not provided by your learning provider







- Personal Protective Equipment or other relevant clothing for vocational courses not provided by your learning provider
- Funds may also support other needs, subject to approval.

2.4. If you are on programme for less than 30 weeks, then you will receive a pro-rata amount.

2.5. If you are 'Released on Temporary Licence' then you are not eligible to access the Discretionary Bursary Fund.

#### Section 3. Eligibility

3.1. To be eligible for Discretionary Bursary:

- Your total household income must be less than £35,000 per annum, including any benefits and earnings (unless your application relates to a reasonable adjustment)
- You should claim under the Discretionary Learner Support Fund (for Level 2 qualifications).

Submission of this application form does not guarantee support from the Bursary Fund.

You must read the Learning Services Worcestershire Financial Support Policy before you complete the application form. Please tick the box to confirm that you have done so. If have any questions please ask your tutor, in the first instance.







Please complete ALL sections:				
Section 1: Learner's Personal Details				
Surname:				
First Name(s):				
D.O.B:				
Telephone Numbe	er:			
Address:				
Course title:				
Course Tutor:				







#### Section 4: Evidence Requirements

The requirements for various forms of evidence are set out below. Please tick the relevant statement.

Please ensure application forms are fully completed and all relevant paperwork enclosed to minimise delays to entitlement awards (again, our staff can advise on this)

Original document/s seen and approved by:
Signature
Job Title
Date

Letter of confirmation from DWP regarding receipt of any benefits, including Income
Support, Income-based Job Seekers Allowance, Employment and Support Allowance or
Universal Credit
Letter of confirmation from HMRC regarding any Tax Credit
Letter of confirmation from you local council detailing any Housing or Council Tax
benefit
Letter of confirmation regarding DLA, PIP or Carer's Allowance
Previous 3 months of Universal Credit award notice
Copy of P60 or audited accounts, if self-employed or P45 if employed

#### SECTION 5: HOW TO APPLY FOR BURSARY FUNDS AND ASSESSEMENT PROCEDURE

Completed forms must be sent to The Business Support Officer at the Fairfield Centre, Carnforth Drive, Worcester, WR4 9HG. If your form has not been completed fully, or if you have not enclosed copies of the appropriate evidence, it will not be possible to process your application and it will be returned to you.

Applications will be assessed by The Business Support Officer, and you can expect to know the outcome of the assessment of your application within 10 working days of receipt your completed (including any supporting information) application form. You will receive written confirmation of the outcome which will include one of the following:

- A letter of confirmation that your application has been successful, and you're allocated funding from the Discretionary Bursary Fund with terms and conditions
- A letter requiring further information
- Information as to why your application was unsuccessful

If you need any help completing your application form please talk to your tutor or the Business Support Team on 01905 728537.







#### **SECTION 6: PAYMENTS**

Any funding made available to you as part of the **Discretionary Bursary** should only be used to pay for the specific items of course expenditure you have been awarded as detailed in your award letter.

If your course is expected to last for less than 30 weeks funding will be made available on a pro-rata basis. Your award letter will explain clearly the amount of your bursary allocation, what it has been allocated for and how it has been calculated.

The **Bursary Fund** will be conditional on you meeting the agreed standards relating to attendance and/or behaviour. The award letter you receive will be clear about the standards that are expected of you relating to the funding allocation you will receive. Receipts for all eligible expenses related to your Bursary allocation must be retained and submitted to the Business Support Team to support reimbursement. Eligible expenses include:

- Transport costs (bus/train tickets)
- Stationery and equipment but not hardware
- Work Experience appropriate clothing/equipment
- Other areas as agreed with the appropriate member of Learning Services.

Please explain below what expenses you would like support with:

#### DISCLAIMER

Allocation of a **Bursary** is subject to the availability of funds from the Education & Skills Funding Agency and a **Bursary** allocation cannot be guaranteed to be awarded to all people who meet the criteria. The financial support you are awarded whilst you are on a course with Adult Learning, does not guarantee financial support for any subsequent courses that you may progress on to. It is a limited fund and will be reviewed on a regular basis.

#### SECTION 7: TRAVEL POLICY - GENERAL INFORMATION AND ELIGIBILITY

If your weekly travel costs to and from your Provider's premises and/or work experience placement exceed the weekly cost of a travel pass, then a travel pass may be issued to you.

#### FUEL ALLOWANCE







Fuel allowances are only to be paid if travel passes, or ticket reimbursements are not appropriate, due to personal circumstances or geographical location. Fuel allowances can be paid to Learners who attend provision in their own vehicles, driven by themselves, such as a moped.

In very exceptional circumstances it may be appropriate to pay a Parent or Carer a fuel allowance for them to drive a Learner to their Provision, for example in the case of disability or rural transport infrastructure not supporting independent travel. This will be at the discretion of the Curriculum Quality Manager. All VAT fuel receipts must be provided to make a claim in all cases.

The allowance amount must be agreed between you, your Training Provider and Central Team Contract Manager. The distance you travel will be considered, alongside Worcestershire County Council's policy for mileage reimbursement, including the qualification amount for mileage, as follows:

Vehicle Excise Duty (VED) Band	Mileage (Eco) Rate/Band
VED bands A to C (0 -120g/km)	45p per mile (band 1)
VED bands D –H (121-175g/km)	40p per mile (band 2)
VED bands I – M (176g/km+)	36p per mile (band 3)

Type of Vehicle (other than a car)	Pence per mile
Solo Motor Cycles (up to 250 cc)	22.5
All mileage	
Solo Motor Cycles (over 250 cc)	31.5
All Mileage	
Mopeds	15.75
All Mileage	

The VED band/CO2 emissions for vehicles registered after 1st March 2001 can be found on the registration document (Form V5). Alternatively, if you or your Parent or Carer know the registration number and the make of the car you can find this information on the DVLA website (https://www.taxdisc.direct.gov.uk/EvIPortalApp/app/enquiry?execution=e 1s2)







#### SECTION 9: RECORDS AND DATA PROTECTION

Staff involved in administering the Bursary will comply with Worcestershire County Council's data protection policy on the storage and transfer of information supplied in the course of application and payment of funds.

#### SECTION 10: REPORTING

Worcestershire County Council / Young Adult Learning Team is expected to make annual management information returns to the Education Funding Agency detailing the overall number, value and type of Bursary/Free Meal awards made, and the number of bursary payments were made by category e.g. books, equipment, transport, meals, accommodation etc.

#### SECTION 11: FRAUDULENT CLAIMS

We have a duty to protect public funds from the possibility of fraudulent claims, therefore we ask for detailed information, and you may be invited in for interview for further clarification. If your claim is considered fraudulent during our spot checks or auditing processes, we will request that any monies already awarded to you is repaid in full. Failure to repay any award may result in further action being taken.

#### SECTION 12: APPEALS AND COMPLAINTS

If your application is unsuccessful, you have the right to appeal against the decision, you may also appeal about the amount or type of award by writing to the Learning Services Operations Manager, The Fairfield Centre, Carnforth Drive, Worcester, WR4 9HG. Your letter should clearly state why you feel the award should be reconsidered. You may be invited to provide additional information or invited to discuss your individual circumstances as part of your appeal.

Complaints about how your application for the Adult Bursary has been processed should be made in accordance with the Worcestershire County Council Complaints Procedure which can be found on www.worcestershire.gov.uk or telephone 01905 845396 For further information contact the Business Support Team at:

The Fairfield Centre Carnforth Drive Worcester WR4 9HG











# Advanced Learner Loan Bursary Application Form 2024/2025

Please complete ALL details in full, and supply copies of financial evidence (all pages please). If you need further information or help completing the application, please contact the Advanced Learner Loan Bursary Department on 01905 728537 or <u>adultlearning@worcestershire.gov.uk</u>.

It is important that you read these notes before you submit your claim for support from the Advanced Learner Loan Bursary Fund.

All payments are based on you attending **all** your classes. If your attendance is unsatisfactory your payments may be delayed, and you may be asked to attend a compulsory attendance meeting. **If you continue to have unsatisfactory attendance your payments may be cancelled, and all funding reclaimed.** 

So that you have all the information necessary to ensure that you meet all the conditions to be awarded a bursary you will need to read the Worcestershire Learning Services Financial Support Policy document. If you have any questions about the policy, please ask your tutor. Once you have read the policy, please tick the box below.

I have read and understood the Learning Services Worcestershire	Yes	/ No
Financial Support Policy.	res	/ 110







#### **SECTION 1: LEARNER DETAILS**

Surname	
First Name(s):	
Address:	
Telephone Number:	
Course Title:	
Course Code:	
Course Tutor:	







#### SECTION 2: ELIGIBILITY FOR ADVANCED LEARNER LOAN BURSARY

You <u>could</u> be entitled to a Bursary if you are, receiving Income Support or Universal Credit in your own right or Employment Support Allowance. The bursary fund can only help towards eligible costs that you may incur, not used to cover the full costs incurred.

To be eligible for an Advanced Learner Loan Bursary your total household income must be less than £35,000 per annum, including any benefits and earnings (unless your application relates to a reasonable adjustment).

Your loan must have been approved by the Student Loans Company and you must have passed what is known as the "liability point" (our staff can advise on this). You should claim under either the Discretionary Learner Support Fund (for Level 2 qualifications) OR the Advanced Learner Loans Bursary Fund (for Level 3 qualifications), if you have costs which are relating to courses at both levels (again, our staff can help advise on this).

You must provide evidence to support your application. Please tick the evidence you can provide. If you need help, please talk to your tutor.

Letter of confirmation from DWP regarding receipt of any benefits, including Income Support, Income-based Job Seekers Allowance, Employment and Support Allowance or Universal Credit
Letter of confirmation from HMRC regarding any Tax Credit
Letter of confirmation from you local council detailing any Housing or Council Tax
benefit
Letter of confirmation regarding DLA, PIP or Carer's Allowance
Previous 3 months of Universal Credit award notice
Copy of P60 or audited accounts, if self-employed or P45 if employed

#### Original document/s seen and approved by:

Signature.....

Job Title .....

Date .....







Please describe what type of support the Contribution is towards:	Description
Equipment (solely needed for the course and not supplied by the Training Provider)	
Child Care (Provider name and OFSTED number) Provider bank details will be required for any payments.	
Other miscellaneous items (DBS Checks, Course visits)	

#### Equipment.

Any contribution for equipment purchased for the course which is not provided by Adult and Community learning will only be paid by BACS to any learner. **There will be no cash or cheque payments made.** 

#### Child Care.

If the childcare provider is not OFSTED registered, we cannot make any contributing towards childcare. Any payments towards the cost of childcare will be made direct to the childcare provider by BACS payment only. **There will be no cash or cheque payments made.** 

All payments will be by BACS transfer there will be no cash or cheque payments.

Incomplete applications or fraudulent applications see Section 4.

Note: If you have not enclosed copies of the appropriate evidence, it will not be possible to process your application and it will be returned to you. This could result in unnecessary delays to processing your application.

Please submit the completed, signed Application Form and supporting evidence to – Business Support Team Fairfield Adult Learning Centre, Carnforth Drive, Worcester, WR4 9HG







#### Declaration: By signing in the box below: YOU UNDERSTAND THAT:

- All evidence must be received within **12 weeks** of starting the programme to qualify for back payment (exceptions may apply)
- Any attempt to dishonestly obtain a bursary shall be treated as fraud that will be subject to disciplinary procedures
- If you leave before the bursary is processed, **NO** bursary payments will be paid
- The relevant attendance criteria will continue throughout the length of the course and will have to be continuously met before we can make any payment
- If your attendance criteria are not met any bursary payments due will be cancelled and any bursary received may be reclaimed

**YOU CONFIRM THAT:** The information given on the form is to the best of your knowledge is correct and true at the time of application AND that I will inform my tutor immediately of any change in circumstances.

#### YOU AGREE THAT:

Worcestershire Learning Services can process your personal data contained in this form in order to assess your eligibility for the Advanced loan bursary fund. If you have given personal information relating to anyone else on this form, you have obtained their permission to disclose it.

Any personal data received will be stored in accordance with the general data protection regulation (GDPR)

**Confidentiality:** Applications are only seen by staff involved in the delivery of Worcestershire Learning Services

Name:	
Signature:	
Date:	

#### I have read the document and am signing this document to confirm that I do NOT want to apply for a bursary

Name:		
Signature:		
Date:		







# **OFFICIAL USE ONLY**

Date application received:	Administrator Signature:
Date Application reviewed:	Administrator Signature:
Date Application returned (Missing Evidence)	Administrator Signature:
Date Application approved:	Administrator Signature:
Date payments made: Process Number:	Administrator Signature:











# Tailored Learning Bursary Fund

Application form

DATE: January 2023

**REVISION DATE: June 2024** 







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Please complete ALL details in full, and supply copies of financial evidence (all pages please). If you need further information or help completing the application, please Contact the Learning Services Worcestershire on 01905 728537 or <u>adultlearning@worcestershire.gov.uk</u>

#### SECTION 1: INTRODUCTION

# It is important that you read these notes before you submit your claim for support from the Tailored Learning Bursary Fund.

1.1. Allocation of a Bursary is subject to the availability of funds from the Education & Skills Funding Agency and a Bursary allocation cannot be guaranteed to be awarded to all learners who meet the criteria. The financial support you are awarded whilst you are on a course with Worcestershire Adult Learning Services, does not guarantee financial support for any subsequent courses that you may progress on to. It is a limited fund and will be reviewed on a regular basis.

1.2. If you raise a need for additional support to access learning, a representative of the Learning Services Worcestershire Team will speak with you to discuss your needs.

You must read the Learning Services Worcestershire Financial Support Policy before you complete the application form. Please tick the box to confirm that you have done so. If have any questions please ask your tutor, in the first instance.







#### SECTION 1: LEARNER'S PERSONAL DETAILS

Please complete ALL sections:
Surname:
First Name(s):
D.O.B:
Telephone Number:
Address:
Course title:
Course Tutor:







I have been referred by the following organisation:

I believe I would benefit from Tailored Learning Support Fund Bursary because:







#### **SECTION 3: EVIDENCE**

I would like to provide the following supporting evidence:

#### **APPEALS AND COMPLAINTS**

If your application is unsuccessful, you have the right to appeal against the decision, you may also appeal about the amount or type of award by writing to the Learning Services Operations Manager, The Fairfield Centre, Carnforth Drive, Worcester, WR4 9HG. Your letter should clearly state why you feel the award should be reconsidered. You may be invited to provide additional information or invited to discuss your individual circumstances as part of your appeal.

Complaints about how your application for the Tailored Learning Support Fund Bursary has been processed should be made in accordance with the Worcestershire County Council Complaints Procedure which can be found on www.worcestershire.gov.uk or telephone 01905 845396

For further information contact the Business Support Team at:

The Fairfield Centre Carnforth Drive Worcester WR4 9HG







# Frequently Asked Questions (FAQs)

#### 1. General Eligibility Questions

- Who can apply for financial support?
  - Learners who meet the eligibility criteria for the relevant bursary or support fund, such as household income thresholds or specific personal circumstances.
- I'm over 19 years old. Can I still apply for support?
  - Yes, support is available for 19+ learners through the AEB Discretionary Learner Support Fund or Advanced Learner Loan Bursary Fund, depending on your circumstances.
- Can international students apply for financial support?
  - Financial support is generally for learners who meet residency criteria outlined in ESFA Funding Rules. Please contact us for specific guidance.

#### 2. Application Process

- How do I apply for financial support?
  - Complete the relevant application form and provide the required supporting evidence. Forms are available from your tutor, our website, or by contacting us.
- When is the deadline to apply for support?
  - Applications are accepted throughout the academic year, but funding is limited, so early application is recommended.
- Can I apply more than once if my circumstances change?
  - Yes, you can submit additional applications if your financial situation changes during the academic year.

#### 3. Evidence Requirements

- What documents do I need to provide with my application?
  - Evidence of household income, such as benefit letters, Universal Credit statements, Tax Credit Award Notices, or recent P60s. Specific requirements depend on the fund.
- Do I need to provide original documents?
  - No, copies are acceptable, but they must be clear and legible.
- What happens if I can't provide the required evidence?
  - Contact us for advice. We may be able to suggest alternative evidence or offer further support.

#### 4. Payment Details

- How and when will I receive financial support?
  - Payments are typically made directly to your bank account or provided as vouchers, depending on the type of support.
- Can support be backdated?
  - No, financial support cannot be backdated. Entitlement begins from the date your application is approved.
- What happens if I leave my course early?
  - Payments will stop, and you may be required to repay some of the support already received.

#### 5. Attendance Requirements

• Do I need to maintain a specific attendance rate to receive support?







- Yes, you must maintain at least 85% attendance and demonstrate active participation and progress on your course.
- What if I miss sessions due to illness or other circumstances?
  - $\circ$   $\;$  You can submit evidence of extenuating circumstances for consideration.

#### 6. Specific Bursary and Fund Questions

- What is the difference between the Vulnerable Learner Bursary and the Discretionary Bursary?
  - The Vulnerable Learner Bursary is for learners in specific defined groups (e.g., in care, care leavers), while the Discretionary Bursary supports learners with general financial needs.
- Can I receive funding for childcare costs?
  - Yes, childcare support is available for learners with Ofsted-registered providers. Early Years Education Entitlement must be used first.

#### 7. Appeals and Feedback

- What if my application is denied?
  - You can appeal in writing to the Service Manager at adultlearning@worcestershire.gov.uk.
  - Can I give feedback about the financial support process?
    - Yes, we welcome feedback. Please contact us via email or speak to a Participation Support Officer.

#### 8. Additional Support

- Can I get help completing my application?
  - Yes, tutors and Participation Support Officers are available to assist you.
- What other support services are available?
  - In addition to financial support, we provide guidance on accessing reasonable adjustments, childcare funding, and other local resources.

#### 9. Policy Updates

- Will the policy change during the academic year?
  - Policies are reviewed annually, but changes may occur in response to updated ESFA guidance.

#### 10. Contact Information

- How can I contact someone about financial support?
  - Call 01905 728537 or email:
    - youngadultlearning@worcestershire.gov.uk (for 16–19 enquiries)
    - adultlearning@worcestershire.gov.uk (for 19+ enquiries)





