16-19 Bursary Policy

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Contents

1. Aims 1
2. Guidance 1
3. Definitions 1
4. Roles and responsibilities 2
   4.1 The Trust Board 2
   4.2 The Headteacher 2
   4.3 Staff 2
   4.4 Parents /Carers and Students 2
5. How we use the bursary fund 2
6. Eligibility criteria for the 16 to 19 bursaries 4
   6.1 Age 4
   6.2 Eligible education provision 4
   6.3 Residency 5
   6.4 Asylum seekers 5
   6.5 Bursaries for young people in defined vulnerable groups 5
   6.6 Discretionary bursaries 6
   6.7 Evidence 8
7. Application and payment process 8
   7.1 Applications 8
   7.2 Payment process 8
   7.3 Conditions for the receipt of bursary payments 9
8. Equality 10
9. Change in circumstances 10
10. Record keeping 10
11. Monitoring arrangements 10
12. Appendix 1 – ESFA 16 to 19 Bursary Fund Checklist 11

1. Aims

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:

1. Bursaries for defined vulnerable groups
2. Discretionary bursaries awarded under this policy and the Education and Skills Funding Agency (ESFA) funding rules.

We aim to:

- Have clear and transparent processes for the use and allocation of 16-19 Bursary funds.
- Make clear to parents/carers and students the type of support which is available and the means of applying for it.
- Make clear to parents/carers and students the attendance and behaviour conditions for receiving the funds.

2. Guidance

This policy is based on advice from the ESFA on the 16 to 19 Bursary Fund guide 2022 to 2023 academic year - GOV.UK (www.gov.uk).

3. Definitions

'In care' is defined 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).

'Looked after child' is defined as:

- A child in the care of a local authority or who is provided with accommodation by the authority in the exercise of any functions for more than 24 hours (section 22 of the Children Act 1989).

'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.

4. Roles and responsibilities

4.1 The Trust Board

The Trustees have overall responsibility for approving this 16-19 Bursary Fund Policy but can delegate it to a committee or the Trust C-Suite team.

The Trust board also has overall responsibility for monitoring the implementation of this policy but has delegated this to the Headteacher.

4.2 The Headteacher

The Headteacher is responsible for ensuring staff are familiar with this 16-19 Bursary Fund Policy, and that it is being applied consistently.

4.3 Staff

Our staff are responsible for implementing this 16-19 Bursary Fund Policy consistently.

The senior leadership team will provide staff with appropriate training in relation to this policy and its implementation.

4.4 Parents /Carers and Students

Parents/carers and students are expected to notify staff or the headteacher of any concerns or queries regarding this 16-19 Bursary Fund Policy.

5. How we use the bursary fund

Financial support is available to eligible students from the 16-19 Bursary Fund. See section 6 below for details of our eligibility criteria.

The fund is intended to support students aged 16 to 19 in overcoming specific financial barriers to participation so they can remain in education.

There are two types of 16 to 19 bursaries:

1. Bursaries for defined vulnerable groups; and
2. Discretionary bursaries.

We use the fund to provide students with support to fund:

- Books

- Equipment
- Field trips and other course-related costs
- Public transport
- University applications
- The costs of attending university interviews and open days.

In addition, the ESFA allows the Trust to use their bursary fund in individual cases of severe hardship, to provide food support whilst a student attends their study programme, for a student they consider to be in real need, without undertaking the checks on household income or gathering other evidence that would normally be required. The ESFA and Trust expect this to only apply to a very small number of the total 16 to 19 student cohort.

For emergency food bursaries we must retain a record of:

- The number of students supported in this way
- The number of days this support is given
- The £'s value of support given to each student along with the rationale for the food support
- The signed confirmation of receipt of funding by the student, if actual spend receipts are not obtained.

We do not expect this arrangement to continue on an ongoing basis for any individual student - institutions should exercise their discretion in each case and should be mindful that this flexibility relates to food support only.

We will not fund:

- Learning support – for example, counselling, mentoring or extra tutoring
- Extra-curricular activities where these are not essential to the students' study programme
- Support general household incomes
- Activities that give the school a competitive advantage over other institutions. Examples include:
    - Fees for access to facilities in the institution
    - Block subsidy of the canteen

- Block subsidy of transport, or travel for all students regardless of family incomes
- Block provision of equipment, materials, or books
- Making bonus payments to reward attendance or achievement
- Payments to support students' general living costs
- Incentivising attendance or as a marketing tool to encourage students to choose their institution over another.

6. Eligibility criteria for the 16 to 19 bursaries

6.1 Age

To be eligible for either bursary in the 2022/23 academic year, students must be at least 16 years old but under 19 years old on 31 August 2022.

Students aged 19 or over are eligible only for a discretionary bursary if they:

- Are continuing a study programme or course which they began when they were aged 16 to 18 years old, or
- Have an education, health, and care (EHC) plan.

Students aged 19 or over are not eligible for bursaries for defined vulnerable groups.

In exceptional circumstances, where students under 16 years old are on a funded 16 to 19 study programme at our school, we may use our discretion to pay bursaries to these younger students. However, if these students are enrolled at another institution that receives public funding for them, they will not be eligible for bursary funding.

6.2 Eligible education provision

Students must be participating in provision that is subject to inspection by a public body that assures quality (e.g., Ofsted). The provision must also fall into one of these groups:

- Be funded directly by the ESFA or by the ESFA via a local authority;
- Be funded or co-financed by the European Social Fund;
- Be otherwise publicly funded and lead to a qualification (up to and including level 3) that is accredited by Ofqual or is on the ESFA's list of qualifications approved for funding 14 to 19; or
- Be a 16 to 19 traineeship programme.

Non-employed students aged 16 to 19 who are participating in a Prince's Trust Team Programme are also eligible to receive a bursary in the same way as any other student participating in an eligible, publicly funded course.

Students are not eligible if:

- They are on an apprenticeship programme; or
- Are on any waged training.

Students who are studying via distance learning are eligible for 16 to 19 bursaries but are likely to require financial help on a more infrequent basis (e.g., travel to exams). If this is the case, we will provide support in-kind, such as a travel pass, details of which shall be decided on a case-by-case basis.

6.3 Residency

Students must meet the residency criteria in the ESFA funding regulations for post-16 provision.

6.4 Asylum seekers

Accompanied asylum seekers under 18 with an adult relative or partner and asylum seekers aged 18 and above are entitled to education but are not entitled to public funds. If necessary, they can apply to the Home Office for suitable housing and cash for essentials.

We will provide in-kind support such as books, equipment and a travel pass to asylum seekers who have not had asylum refused.

Unaccompanied asylum-seeking children:

- Are the responsibility of the local authority;
- Are to be treated as 'looked after' children; and
- Are eligible for a bursary for vulnerable groups, where they have a financial need.

When these students reach 18 years old, we will consider their immigration status. They will still be eligible for a bursary as a student from a defined vulnerable group if the asylum claim is in their favour and will be treated as a 'care leaver' until they reach the upper age limit.

6.5 Bursaries for young people in defined vulnerable groups

Students with a financial need, who meet one of the following 4 criteria below, in addition to the criteria outlined in sections 6.1, 6.2 and 6.3 above, can apply for a bursary for vulnerable groups.

The defined vulnerable groups are students who are:

- In care (NB: those who are privately fostered are not classed as looked after);
- Care leavers;

- 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; or
- Receiving Disability Living Allowance (DLA) or Personal Independence Payments (PIPs) as well as Employment and Support Allowance (ESA) or UC.

UC has now replaced IS, as well as other benefits above, for current and future young people aged 16 to 18. However, students aged 19 to 25 and funded from the 16 to 19 budget (19+ continuers and students with an EHC plan) may still receive the legacy benefits listed above.

Students who meet the criteria for a bursary for vulnerable groups are not automatically entitled to a bursary. Students will not receive the bursary if they do not have any actual financial need (for example, because their financial needs are met from other sources and/or because they have no relevant costs).

Where a bursary is provided, the funds will be up to £1,200 per year for study programmes lasting 30 weeks or more. When calculating the amount, cases will be looked at individually and base the outcome based on a particular student's needs. Students will only receive the amount they need to participate and will not automatically receive £1,200 if they do not need the full amount.

We can use our discretion, on a case-by-case basis, and provide more than £1,200 per year if such would be necessary in all the circumstances for the student to remain in education. Any such additional payment will be paid either from our discretionary bursary allocation or our own funds.

If a student's study programme lasts for less than 30 weeks, they will be paid a pro-rata amount. We will also consider the number of hours involved in a student's study programme when deciding whether a pro-rata payment is more appropriate.

We will review the student's eligibility position each academic year. Students will only continue to receive a bursary for vulnerable groups if they continue to satisfy the criteria.

We will provide this support for students from the bursary fund by making payments in kind where possible. It will not be provided it as regular payments for living costs.

6.6 Discretionary bursaries

In addition to the criteria outlined in sections 6.1, 6.2 and 6.3 above, students can apply for a discretionary bursary if they satisfy one or more of the following criteria:

- In receipt of Free School Meals or Child Tax credit (note this is relaxed guidance for 22/23 only)
- Section 5 of the DfE guidance specifies 'Institutions must ensure that students are eligible for the discretionary bursary in each year they require support.' However, for 2022 to 2023

academic year so that the bursary fund rule is consistent with that for free meals in further education.

- Current eligibility for free meals only requires a single check of household income for each phase of education (Primary, Secondary or 16 to 19). In making decisions about bursary awards, schools should conduct checks annually at the beginning of a student's study year programme or in the subsequent years get a signed and dated (hard copy or electronic) self-declaration form is obtained from the student to confirm that their household circumstances have not changed.

Students who do not satisfy any of the criteria listed in this section, but who are able to demonstrate financial hardship arising from other reasons, may apply for a discretionary bursary.

In assessing any application for a discretionary bursary, we will consider:

- Level of household income
- Distance to travel between the student's home and the school
- The number of dependent children in the student's household
- The requirements of their study programme
- Whether the student has additional responsibilities that may mean they need extra help.

There is no set limit for the amount of discretionary bursary that can be awarded to students. It can be at a higher or lower level than the bursary for vulnerable groups if there are clearly identifiable costs. We will base all decisions around which students receive a discretionary bursary, and how much bursary they receive, on each student's individual circumstances and their actual financial need.

Schools must manage the number and size of discretionary bursary awards to keep within their budget.

The amount granted and rationale must be detailed in the auditable records.

We will review the student's eligibility position each academic year. Students will only continue to receive a discretionary bursary if they continue to satisfy the criteria.

Schools may decide to retain a small emergency fund from their allocation to support students who face exceptional circumstances during the year due to a change in their situation – if it impacts on their ability to participate in education. Evidence of the student's eligibility, the individual assessment and the student's actual participation costs must be held for audit purposes as for any other bursary fund application/award and all bursary expenditure must be in line with the funding rules in this guide.

6.7 Evidence

All applications for 16 to 19 bursaries must be supported by appropriate evidence. The school must ensure students are eligible for the bursary in each year they require support. Examples of acceptable evidence we may request are:

- A copy of the Universal Credit ("UC") or Income Support ("IS") award notice, in the student's name
- Documents such as a tenancy agreement in the student's name, a child benefit receipt, birth certificate or utility bills
- Written confirmation of the student's current or previous looked-after status from the relevant local authority
- A copy of the UC claims from Department of Work and Pensions
- A copy of Free School Meals eligibility
- A copy of a Child tax Credit award
- P60 and three consecutive months of bank statements detailing monthly income.

7. Application and payment process

7.1 Applications

Applications should ideally be submitted by **Friday 16th September 2022** to allow enough time for our school to assess the overall level of demand and make discretionary awards on a fair basis. This date will be clearly stated on the application form.

However, we acknowledge that students' circumstances may change and therefore the application process will remain open for the whole school year.

Applicants will be notified in writing (either via email or via letter) whether their application has been successful, together with an outline of the support they will be offered. If a student wishes to appeal the outcome of their application for a bursary, they must follow the school's complaints procedure.

7.2 Payment process

Payments are made using the following process:

- In-kind payments, such as textbooks, equipment etc
- Payments by BACS transfer to the student's bank account to reimburse authorised payments for approved items. Receipts must be submitted to verify these purchases.

7.3 Conditions for the receipt of bursary payments

Payments of the bursary are conditional on students meeting the following conditions in relation to their standards of attendance, punctuality, and behaviour:

- Good attendance and punctuality – with attendance at 95% and above
- Good behaviour – in accordance with the school behaviour policy.

If attendance is below 75% then schools have the discretion to remove payments and/or exam entry funding. This decision must be approved by Trust in advance with the rationale and circumstances of the case assessed. This will include a review of any supporting evidence from bodies such as the NHS. Trust will ensure appropriate legislation is complied with.

In considering whether exam entry funding be removed we would ensure any decision was in line with legislation and our funding agreement. Specifically, a student would only be removed from an exam if

1. *We consider that there are educational reasons in the case of that pupil for not entering them for that examination or (as the case may be) for not entering them for that examination in that syllabus, or*

2. *the parent of the pupil requests in writing that the pupil should not be entered for that examination or (as the case may be) for that examination in that syllabus.*

All students are required to sign a declaration confirming that they agree to these conditions.

Students who fail to meet these conditions may have their payment withheld, but we will always take students' individual circumstances into consideration. This includes considering the impact on attendance that might be caused by illness, caring responsibilities, or other exceptional circumstances.

We will stop payments where students have been absent for a period of 4 continuous weeks or more (excluding holidays) and where students have decided to withdraw from a study programme.

We reserve the right to take back money from students where it is not spent for the reasons it was awarded.

We will consider the impact of such an action on the individual student before taking a final decision to do so, and any decision will be confirmed to the student in writing.

8. Equality

We must comply with the requirements of the Equality Act 2010 when setting their criteria and must not discriminate against their students, either directly or indirectly, because of their protected characteristics.

9. Change in circumstances

If there are changes in circumstances which may affect eligibility for a bursary, applicants and/or parents/carers must notify the school without delay.

10. Record keeping

Any paperwork and documents we retain for audit purposes (for example, copies of application forms, documents as evidence and any agreements signed by students) will be kept securely in line with our data protection policy, privacy notices and record retention schedule.

11. Monitoring arrangements

This policy will be reviewed by the Head of Sixth Form every year. At every review, the policy will be approved by the governing body.

12. Appendix 1 – ESFA 16 to 19 Bursary Fund Checklist

Education & Skills
Funding Agency

16 to 19 Bursary Fund checklist

You should use this checklist when assessing student applications for support from the 16 to 19 Bursary Fund.

Eligibility: All Bursaries

- ☐ Student meets the age criteria.
- ☐ Eligible education provision.
- ☐ Student meets the residency criteria for post-16 provision.
- ☐ Evidence of eligibility has been retained.

Bursary for defined vulnerable groups

- ☐ Student falls within one of the defined vulnerable groups for example, in receipt of the specified benefits in their own right or in care/care leaver.
- ☐ Financial needs assessment carried out to confirm actual financial need and amount of support required. **No student should automatically receive £1,200.**
- ☐ Appropriate evidence seen and copies retained to confirm student's eligibility, including the letter to support in care.
- ☐ Support awarded in kind (bus pass, meal vouchers, books or equipment purchased on student's behalf). Receipts should be retained.
- ☐ Award letter issued to student confirming the amount of support, what support will be made in-kind and payment conditions.

Discretionary bursary

- ☐ Evidence to confirm the student meets the institution's bursary fund criteria, including household income and statement of actual participation costs.
- ☐ Evidence of income and overall eligibility obtained, and copies retained.
- ☐ Assessment of student's actual financial needs carried out. **Block, blanket or flat rate payments are not permitted – the bursary award should reflect the actual costs the student has.**
- ☐ Support awarded in kind (bus pass, meal vouchers, books or equipment purchased on student's behalf). Receipts should be retained.
- ☐ Award letter issued to student confirming the amount of support, what support will be made in-kind and payment conditions.