



16-19 BURSARY POLICY

**Presented to
Trustees Resource Committee
DRAFT**

Date approved: ¹	23 June 2021
Date reviewed: ²	October 2023
Date of next review: ³	

¹ This is the date the policy was approved by the meeting

² This is the date the policy was reviewed prior to its approval above

³ This is the date as set by the policy review clause or the date approved plus two years

- Headteacher also means Head of College and Principal
- School also means College, Academy or Academies
- MAT refers to Multi-Academy Trust

16-19 BURSARY POLICY

1.0 Introduction

- 1.1 A key priority for the Government is to close the gap in attainment between those from less well-off and more affluent backgrounds, and to ensure every young person participates in and benefits from a place in 16 to 19 education or training.
- 1.2 The 16-19 Bursary is designed to support young people aged 16-19 to continue in education, and to remove barriers to participation that they may face, for example help with the cost of transport, meals in school, books and equipment. All beneficiaries of this fund will need to meet eligibility criteria and conditions as laid out by the Four Cs MAT (Trust). Failure to do so will result in bursaries not being awarded or withdrawn. Bursary funds should not be used to displace other types of support available to young people eg childcare costs should not be covered that can be covered via Care to Learn, or Transport costs that are met by the Local Authority.
- 1.3 The Trust is funded by the Education and Skills Funding Agency (ESFA) and receives a Bursary Fund Allocation each year. The aim of this policy is to distribute the total of the fund as fairly as possible between learners in accordance with the guidance issued by the ESFA.
- 1.4 At the beginning of the academic year, Trust schools will encourage young people to apply for bursaries. Deadlines will be set for applications; however this will not preclude the Trust school from considering applications beyond this date, but will enable funds to be distributed as fairly as possible. The Trust school will assess the needs of individual students when awarding bursary funding. A bursary will only be awarded to a student that is eligible and facing genuine financial barriers to participation. Trust schools will hold back funds to support in-year applications.

2.0 Eligibility

- 2.1 To be eligible to receive a 16-19 Bursary, the student must be aged 16 or over and under 19 on 31 August and undertaking courses within Key Stage 5.
- 2.2 Students must also satisfy the residency criteria set out in the *ESFA Funding Guidance. *(A person on 1 September who is settled in the UK, and has been ordinarily resident in the UK and Islands for the three years preceding the 1 September.)* If students are in any doubt, they should speak with the Head of Sixth Form.
- 2.3 Students should be participating in a provision that is subject to inspection by a public body that assures quality and funded within the relevant guidelines. *(Attendance at Trust schools meets the criteria).*

3.0 Participation

- 3.1 Payment of bursaries will be conditional upon a range of factors. This will include regular attendance, satisfactory behaviour and completion of coursework. This will be assessed on an ongoing basis.
- 3.2 All young people will be expected to maintain a minimum level of attendance and will be monitored regularly. Authorised absence will be classified as attendance.
- 3.3 To receive bursary payments, students must have 0% unauthorised absences and overall above 90% attendance, with behaviour and effort satisfactory or better. Students must

attend all timetabled lessons (unless absence agreed in advance by the Sixth Form Team) and should have no late marks at the start of the day or for individual lessons.

3.4 The bursary awarded must be used for specific educational purposes, which include, but are not limited to:

- Transport (bus pass, other public transport costs, or mileage for car driver only for journeys to/from the Trust schools and to attend essential course related trips/events)
- Examination re-sit fees
- Meals at the Trust school
- Uniform as described in the Trust school's Uniform Policy and Sixth Form Dress Code (up to a maximum of 50% of amount awarded)
- Equipment, books and materials required in order to complete the course (larger items will be considered by way of a contribution of no more than 50% of the full cost, up to a maximum of £300)
- Educational visits or work-related activities that are a compulsory element of the programme of study
- Attendance at university interviews and open days
- Other expenses approved by the Trust school that are related to supporting attendance and participation.

3.5 The assistance required must be indicated on the application form and will assist in determining the level of Bursary awarded.

4.0 **Bursaries for the Most Vulnerable Learners – High Priority Group**

4.1 The Trust schools will consider a bursary in the region of £1,200 to learners in the following categories:

- Students in care, including those placed with a foster carer by the Local Authority
- Care leavers
- Students in receipt of Income Support or Universal Credit because they are financially supporting themselves, or financially supporting themselves and anyone who is dependent on them and living with them such as a child or partner
- Students in receipt of Disability Living Allowance or Personal Independence Payments in their own right as well as Employment and Support Allowance or Universal Credit in their own right.

4.2 The definition of a Care Leaver according to the Children (Leaving Care) Act 2000 is:

'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 of 13 weeks), which began after the age of 14 and ended after the age of 16'.

5.0 **Discretionary Bursaries**

5.1 Students can apply for a Discretionary Bursary which must be used for specific educational purposes. To be considered for a Discretionary Bursary, an applicant must have a total annual household income of no more than £35,000. An Income Declaration form must be completed and supporting evidence provided to the Trust school as part of the initial application process, or where circumstances change.

5.2 The value of the award will be dependent on the student's assessed need. It is expected that the Discretionary Bursary awards will be between £500 to £1000 for the academic year. However, where the use of public transport is essential in order to attend the Trust schools, and/or where the student will incur specific one-off costs as part of their course, this will be taken into account.

6.0 **Discretionary Bursaries - Other Areas**

6.1 Trust schools will consider financial support in other areas relating to education and student welfare including but not limited to students who have siblings also in Post 16 at one of the Trust's secondary schools, single parents, or where the student or their family can demonstrate that they are currently in a period of hardship and that the support will benefit the students' progress in education. In addition, Trust schools will consider emergency support for students who face exceptional circumstances during the year which impact on their ability to participate.

7.0 **Application Process**

7.1 All new applications must be made in writing on the Trust's application form, signed and dated by the applicant. For those young people that are not living independently there should be an additional signature from the parent/carer for those under 18.

7.2 The first and main closing date for applications will be as outlined on the application form (usually a date pre-set in September). Thereafter, applications will be considered on an ad hoc basis eg from students who enrol later, apply later or whose financial circumstances change.

7.3 Applicants will be required to provide evidence to verify their eligibility for the bursary and the applicant will need to provide relevant information to establish the household income. Evidence of total household income will include any source of income eg employment, investment, benefits for both the applicant and the adults living with the applicant. Any savings of the above parties may also be taken into account. This information can be evidenced by P60's, wage slips, Tax Credit Awards, last three Universal Credit Award Statements, and self-employment accounts and letters of confirmation of benefits from the job centre.

7.4 To reapply for a Bursary award in their second year, a student should complete a self-declaration form if their household income circumstances have not changed. If there has been any change in circumstance, a full application form and Income Declaration should be completed.

8.0 **Assessment**

8.1 Applications will be assessed by the Trust school's Finance Department in accordance with this policy and ESFA guidance in conjunction with the Head of Sixth Form. The final decision lies with the Headteacher.

8.2 Details of the reason and expenditure, with the amount of Bursary funding required, should be included within the application form. This will be used to make decisions on the level of award to be given.

8.3 Documentary evidence to support applications will be checked and copies retained by the Trust school for audit purposes. The evidence will be held in strict confidence.

- 8.4 If a student applies during the academic year, the number of whole weeks remaining in the academic year may be taken into account when determining the amount awarded. If a bursary is awarded for courses that are less than 30 hours per week, this will be pro rata.
- 8.5 The application will be assessed and, if successful, the value of this award will be dependent on the student's assessed need. The student will be notified of the amount awarded for the academic year.
- 8.6 If a student's situation changes during the course of the year, then their eligibility can be re-assessed. Students must notify the Trust school of changes in their circumstances that might affect their continued eligibility. A student can re-apply for a bursary if their circumstances change during the year or if they had a previous award withdrawn. The amount awarded will be dependent on the specific needs of the student.

9.0 Payments

- 9.1 Once awarded, students must submit a completed claim form with receipts attached to claim a payment from their bursary. Approved claims will be paid weekly by BACS during term time into the student's own bank account, as and when claimed. Student will need to ensure they have a bank account in their own name and provide this on the application form.
- 9.2 Where specific needs have been identified, such as a bus pass, one-off course costs such as books, calculator etc, the student can complete a claim form asking for these items to be purchased by the Trust school and the cost deducted from their bursary. Payment will then be made direct to the supplier when an invoice is received.
- 9.3 Any benefits in kind are the property of the Trust school. If they can be re-used for other learners, the student may be required to hand them back to the school at the end of the course or programme of study.
- 9.4 All discretionary payments are subject to availability of funds. The level of award will vary from student to student, being subject to both need and the availability of discretionary funds.

10.0 Appeals

- 10.1 Applicants may appeal in writing against the decision to the Trust Chief Financial Officer. Appeals will be determined by the Chief Executive Officer and a member of the Trustees where applicable. If the decision of the appeals panel fails to resolve the issue then applicants should follow the Trust normal complaints procedure.

11.0 Data Protection

- 11.1 All partners under this policy agree to share data and information in order to verify a young person's eligibility and to verify the position for any student that moves between providers during the year. The information contained within the application will be treated as confidential and only shared where necessary to progress an application.
- 11.2 Hard copy information associated with applications, decisions and panels will be kept to satisfy ESFA audit expectations. The Trust school may also keep information electronically. Any personal information that is kept will be kept securely, in line with our document retention guidance.

12.0 Equal Opportunities

- 12.1 All aspects of the applications process and associated decisions will be managed with due regard to equal opportunities legislation.

13.0 Monitoring and Review

- 13.1 The Trustee Resource Committee has the responsibility for implementing, monitoring and reviewing this policy. Any issues, which arise, which do not fall within the remit of this Committee or are relevant to other areas of the Trust, will be brought to the attention of the relevant committees and /or individuals.

- 13.2 The Trustees will review this policy in line with the procedure for policy review.

Date for review - if no other reason for review (see policy review procedure) this policy will be reviewed every three years.