

## 16-19 Bursary Fund Policy

**Review date:** July 2023

**Review by:** SLT

**Final Approval:** SLT

### **Context**

The Core Values of the academy, which relate specifically to this policy, state that we are working together to form relationships based on:

- **Justice** – everyone is entitled to be treated fairly and to promote the self-esteem of others.
- **Truth** – everyone is required to be honest and to communicate in a positive manner.
- **Compassion** – everyone is encouraged to be generous in their concern for others

Such values contribute to our Academy's common purpose of 'Striving for high quality education with a strong Christian ethos'.

### **Data Protection**

Any personal data processed in the delivery of this policy will be processed in accordance with the Academy's Data Protection Policy.

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## **1. Introduction**

The 16-19 Bursary Fund provides financial support to help students overcome specific financial barriers to participation so they can remain in education. The fund is allocated to post-16 providers by the Education and Skills Funding Agency (ESFA). Students may experience financial difficulties with costs such as transport, offsite educational activities, equipment or other course related costs. Eligibility is based on the student meeting residency requirements and being on a means-tested or disability benefit.

## **2. The Bursary Scheme**

There are two types of 16 to 19 bursaries:

- I. Higher-priority claimants (defined vulnerable groups)
- II. Discretionary bursaries awarded to meet individual needs.

The Academy is responsible for managing both types of bursary. Students who wish to apply for support from the Bursary Fund must complete and submit an application form.

## **3. Eligibility criteria – all bursaries:**

To be eligible for either type of bursary the student must:

- Be aged over 16 and under 19 at the end of the academic year.
- Be aged 19 or over at the end of the academic year and continuing on a study programme they began aged 16 to 18 ('19+ continuers') If students are over the age of 19 at the end of the academic year, they must have an Education, Health and Care Plan (EHCP).
- Meet the residency criteria in section 3 of the ESFA document '[Funding guidance for young people](#)'. Section 3 of this document also specifies the evidence the academy must see to confirm eligibility.

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In addition, the student must also meet one of the criteria listed below:

### **3.1 Criteria for Higher Priority Claimants (defined vulnerable groups)**

Students must fall into one or more of the categories below to be able to apply for a vulnerable bursary:

1. In care; (See Appendix 1 for definition)
2. Care leaver; (See Appendix 1 for definition)
3. Young person in receipt of Income Support or Universal Credit (See Appendix 2) 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;
4. Young person in receipt of Disability Living Allowance or Personal Independence Payments in their own right as well as Employment and Support Allowance (ESA) or Universal Credit (UC) in their own right (See Appendix 2).

In some cases, a young person might meet the eligibility criteria for a bursary for vulnerable groups but their financial needs are already met. Therefore, they have no relevant costs or do not need the maximum award.

### **3.2 Criteria for Discretionary Bursaries**

Students with household incomes of less than £16,190 (FSM eligibility criteria) may apply for a lower level of support determined by their specific needs.

The following evidence will be required for students in this group:

- A copy of entitlement to means-tested state benefit, or Tax Credit Award Notice confirming household income of less than £16,190; or
- Evidence of income from self-employment, a P60, or 3 to 6 months' worth of bank statements as evidence; or
- 3 most recent monthly award statements for Universal Credit.

See section 5 below regarding how both of the funds are allocated.

## **4. Applications**

The fund will be open for applications for the following academic year in August each year. Application forms must be completed and submitted to the Assistant Business Manager. The application form is available on the Sixth Form section of the academy website. Funding is not guaranteed.

## **5. Allocation**

Decision is made by the Assistant Business Manager about which students receive a discretionary bursary and how much they receive are made after an analysis of each student's individual circumstances and their documented financial need. This will vary from student to student depending on, for example, household income, number of dependent children in the household, distance travelled to school and requirements of individual study programmes.

- up to 5% of the fund will be allocated to cover administrative costs

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- where a student is required to attend a subject related trip (e.g. Geography field trip) the appropriate amount will be deducted from the allocation.

## 6. Appeals

Students have the right to appeal a decision. Students, or their parent/guardian, will be required to put an appeal in writing within 21 days of receiving confirmation of an award or a rejection.

6.1 The letter should set out the reasons for the appeal, which must prove that the student has been wrongly assessed as falling outside the eligibility criteria, plus any further evidence to support the Appeal. It should be sent to the Sixth Form Office.

6.2 The decision of the Appeals Panel is final and will be given in writing within 14 days of the decision.

6.3 The Appeals panel will consist of,

- a. A Head of 6<sup>th</sup> Form
- b. A member of the Senior Leadership Team

The Appeals Panel meeting will be clerked by a member of the school's administrative/finance team.

## 7. Payment

The academy will base all decisions about which students receive a discretionary bursary and how much bursary they receive on each student's individual circumstances and their actual financial need. These will vary from student to student, depending on, for example, their household income, the distance they need to travel to the institution and the requirements of their study programme. The academy will not make bursary fund payments as regular payments for living costs as this is out of scope of the bursary fund.

The academy will provide wherever possible course materials, bus travel passes and offsite educational activities. Students will need to itemise their requirements and seek approval from the academy for spend. Prior approval will be obtained at the initial confirmation of funding.

- Where the academy cannot provide the services directly (eg train tickets), students must provide a receipt of evidence and the academy will make payment via BACS transfer.
- The academy reserves the right to cease bursaries where a students' attendance and punctuality is deemed unacceptable. (Expectations are outlined in the sixth form contract.)

## 8. Audit

The fund will be audited in line with the academy's standard audit procedures.

## 9. Monitoring and Review of the Bursary Fund

The Assistant Business Manager will oversee the operation of the Bursary Fund on a termly basis

This policy, and its operation, will be reviewed by the Business Manager at the end of each academic year to review the allocations and criteria for awards for the 16-19 Bursary Fund.

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## Appendix 1 Definitions: 'In care' and Care Leavers'

The 16 to 19 Bursary Fund defines 'in care' as 'Children looked after by a local authority on a voluntary basis (section 20 of the Children Act 1989) or under a care order (section 31 of the Children Act 1989) - Section 22 of the Children Act 1989 defines the term 'looked after child'.' A 'care leaver' is defined as:

- A young person aged 16 and 17 who was previously looked after for a period of 13 weeks consecutively (or periods amounting to 13 weeks), which began after the age of 14 and ended after the age of 16; or
- A young person aged 18 or above who was looked after prior to becoming 18 for a period of 13 weeks consecutively (or periods amounting to 13 weeks), which began after the age of 14 and ended after the age of 16

The allocation of these funds will be subject to audit so the Academy will require proof that the application is genuine in the form of written evidence from the young person and her key worker. The academy will seek and retain copies of evidence from the young person, bearing in mind confidentiality. Appropriate evidence for students who are in care or a care leaver includes: written confirmation of their current or previous looked-after status from the relevant local authority. This is the local authority which looks after them or provides their leaving care services. This could be a letter or an email but must be clearly from the local authority.

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## **Appendix 2**

### **Income Support, Universal Credit, Personal Independence Payments, Disability Living Allowance**

More information about Income Support can be found at [www.gov.uk/income-support](http://www.gov.uk/income-support)

More information about Universal Credit can be found at [www.gov.uk/universal-credit](http://www.gov.uk/universal-credit)

More information about Employment and Support Allowance can be found at [www.gov.uk/employment-support-allowance](http://www.gov.uk/employment-support-allowance)

More information about Personal Independence Payments can be found at [www.gov.uk/pip](http://www.gov.uk/pip)

The allocation of these funds will be subject to audit so the Academy will require proof that the application is genuine in the form of written evidence from the young person and her key worker. The academy will seek and retain copies of evidence from the young person, bearing in mind confidentiality. Appropriate evidence includes:

- For students in receipt of Income Support or Universal Credit (UC), a copy of their Income Support or UC award notice. This must clearly state that the claim is in the student's name/confirm they are entitled to the benefits in their own right. The evidence must not state any conditions that prevent them from participating in further education or training. For students in receipt of UC, institutions must also see a tenancy agreement in the student's name, a child benefit receipt, children's birth certificates, utility bills and so on;
- For students receiving UC/ESA and Disability Living Allowance and Personal Independence Payments, a copy of their UC claim from DWP. Evidence of receipt of Disability Living Allowance or Personal Independence Payment must also be provided;

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16 – 19 Bursary Fund Application

**CONFIDENTIAL**

<b>1. Student Full Name:</b>
<b>2. Date of Birth:</b>
<b>3. Address:</b>  <b>Post Code:</b> <b>Email address:</b>
<b>4. Please provide details of the items for which you require funding (eg. transport, offsite educational activities, equipment or other course related costs):</b>
<b>Signature of Applicant:</b>
<b>ALL APPLICATIONS MUST BE ACCOMPANIED BY THE APPROPRIATE EVIDENCE OF FINANCIAL HARDSHIP TO SUPPORT YOUR APPLICATION.</b>
<b>Office use only:</b> Mrs Kirsty Smith – <a href="mailto:ksmith@bishopstopford.com">ksmith@bishopstopford.com</a>

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