

## 16 to 19 Bursary Fund Policy

<b>Policy type</b>	Ormiston SWB Academy
<b>Author</b>	Ali Lampitt
<b>Approved by</b>	
<b>Release date</b>	July 2022
<b>Next release date</b>	July 2023

### 1. Aims

Ormiston SWB Academy aims to:

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

### 2. Guidance

This policy is based on advice from the Education and Skills Funding Agency (ESFA) on the [16 to 19 bursary fund for the 2021 to 2022 academic year](#).

### 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:
  - 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 governing board

The governing body has overall responsibility for approving this 16 to 19 bursary fund policy, but can delegate this to a committee, an individual governor or the Principal.

The governing body also has overall responsibility for monitoring the implementation of this policy.

At Ormiston SWB Academy, monitoring the implementation of this policy has been delegated to Mrs J Bayley, Associate Assistant Principal.

#### 4.2 The Principal

The Principal is responsible for ensuring staff are familiar with this 16 to 19 bursary fund policy, and that it is being applied consistently.

#### 4.3 Staff

Our staff are responsible for implementing this 16 to 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

Parents are expected to notify staff or the Principal of any concerns or queries regarding this 16 to 19 bursary fund policy.

### 5. How we use the bursary fund

Financial support is available to eligible students from the 16 to 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:

- Bursaries for defined vulnerable groups; and
- Discretionary bursaries

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

- Transport
- Books
- Business wear
- Equipment
- Field trips and other course-related costs
- The costs of attending university interviews and open days

### 6. Eligibility criteria for the 16 to 19 bursaries

#### 6.1 Age

To be eligible for either bursary in the 2021 to 2022 academic year, students must be at least 16 years old but under 19 years old on 31 August 2021.

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

- Are continuing on 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 ESFA or by 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 either 16 to 19 bursary 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) in their own right as well as Employment and Support Allowance (ESA) or UC in their own right

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 generally be up to £1,200 per year for study programmes lasting 30 weeks or more. When calculating the amount, we will look at cases individually and base the outcome on a particular student's needs. Students will only receive the amount they actually 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.

### 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:

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 (**Level 2 household income under £16200/Level 3 household income between £16201 and £25000**)
- Distance to travel between the student's home and the institution, or a location for a placement
- 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. 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.

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.

## 6.7 Evidence

All applications for 16 to 19 bursaries must be supported by appropriate evidence. Examples of acceptable evidence we may request are:

- Previous 3 to 6 months' worth of payslips;
- P60;
- Written confirmation of a student's current or previous looked-after status from the relevant local authority; and/or
- Written confirmation of a benefit award or tax credit notice, in the name of the student (for either bursary) or the parent (for the discretionary bursary)
- Tax Credit Award (tax year 2020-2021)
- Evidence of self-employment income (tax year 2020-2021)

## 7. Application and payment process

### 7.1 Applications

Applications should ideally be submitted by the end of September for each Academic year 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 the amount of funding awarded. 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:

- Make in-kind payments, such as travel passes, books, equipment or vouchers for meals
- Make monthly/termly payments by BACS transfer to the student's bank account

### 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 and behaviour:

- Attendance above 95% (subject to exceptional circumstances)
- Following your sixth form code of conduct

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. 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.

## **9. Record keeping**

Any paperwork and documents we retain for audit purposes (for example, copies of application forms, household income evidence and any agreements signed by students) will be kept securely in line with our data protection policy, privacy notices and record retention schedule these are available on our website or on request via the Business Manager.

## **10. Monitoring arrangements**

This policy will be reviewed by the Senior Leadership Team every-year. At every review, the policy will be approved by the governing body.

## Sixth Form Student Financial Support (Bursary) Application Form

**IMPORTANT** – Please complete all parts of this form in black ink and block capitals.

<b>Section 1: Personal Details</b>			
<b>First Name:</b>		<b>Surname:</b>	
<b>Address including Postcode:</b>			
<b>Mobile Number:</b>		<b>Date of Birth:</b>	
<b>Courses Chosen:</b>	1.	2.	3.
<b>Other Courses</b>	<input type="checkbox"/> Core Maths <input type="checkbox"/> English resit <input type="checkbox"/> EPQ <input type="checkbox"/> LIBF <input type="checkbox"/> Maths resit		
<b>Parent Name:</b>		<b>Parent Email:</b>	
<b>Method of travel To/from Academy</b>	Car	<b>Bus</b>	<b>Other:</b> _____
<b>Are you in receipt Of Free School Meals:</b>		<b>Yes / No</b>	

## Section 2: Eligibility

<p>Please tick which level of financial support you are applying for</p>	<p>Please tick which of the criteria describes you and/or the evidence you will be providing to support your application and include the <b>original documents</b>. (We will treat these with the highest confidentiality, photocopy and return to you)</p>
<p><b>Level 1 – Vulnerable Bursary</b></p>	<ul style="list-style-type: none"> <li>• Students in care</li> <li>• Care Leavers</li> <li>• I am in receipt of Income Support or Universal Credit <b>in my own right</b> and/or I am financially supporting a dependent who is living with me.</li> <li>• I am in receipt of Disability Living Allowance or Personal Independence Payments in my own right as well as Employment and Support Allowance or Universal Credit <b>in my own right</b>.</li> </ul>
<p><b>Level 2 – Discretionary Bursary</b> (household income under £16200)</p>	<ul style="list-style-type: none"> <li>• Receipt of benefits / Universal Credit (tax year 2020-2021)</li> <li>• P60 (tax year 2020-2021)</li> <li>• Tax Credit Award (tax year 2020-2021)</li> <li>• Evidence of self-employment income (tax year 2020-2021)</li> <li>• Universal Credit monthly award notices for: July, August and September</li> <li>• Parental pay-slips for: July, August, September</li> </ul>
<p><b>Level 3 – Discretionary Bursary</b> (household income between £16201 and £25000)</p>	<ul style="list-style-type: none"> <li>• Receipt of benefits / Universal Credit (tax year 2020-2021)</li> <li>• P60 (tax year 2020-2021)</li> <li>• Tax Credit Award (tax year 2020-2021)</li> <li>• Evidence of self-employment income (tax year 2020-2021)</li> <li>• Universal Credit monthly award notices for: July, August and September</li> <li>• Parental pay-slips for: July, August, September</li> </ul>

### **Section 3: Bank/Building Society Details (Bank statement/card will be required to verify account details) MUST BE STUDENTS OWN PERSONAL ACCOUNT**

<b>Full name of account holder:</b>		
<b>Name of Bank/Building Society:</b>		
<b>Branch:</b>		
<b>Sort Code:</b>		
<b>Account Number:</b>		
<b>Signature: (Student)</b>		<b>Date:</b>
<b>Signature: (Head of 6<sup>th</sup> Form)</b>		<b>Date:</b>
<b>Signature: (Business Manager)</b>		<b>Date:</b>
<b>Signature: (Finance Manager)</b>		<b>Date:</b>

### **Section 4: Student Declaration**

I confirm that the information supplied in this form is correct and complete to the best of my knowledge and belief. I understand that if my claim is found to be fraudulent, I will be subject to the Academy disciplinary process and my bursary may be stopped. I understand that the Academy reserves the right to request further evidence to support my application. I understand that I may not receive financial support if my attendance and behaviour does not meet the Academy requirements and I adhere to the terms and conditions of this contract.

<b>Student Signature:</b>		<b>Date:</b>
---------------------------	--	--------------

### **Section 5: Parent / Guardian Agreement**

I have supplied my email address

I have not supplied my email address and I am aware that I may miss important Learner Support information communicated by email by the Academy

I confirm that the evidence supplied to support this application is correct and I understand that any changes in my circumstances must be reported to the Academy. I understand that financial support for the person in my care may be stopped if their attendance and behaviour does not meet the Academy requirements. I also agree to encourage the student in my care to adhere to the terms and conditions of this contract.

<b>Parent/Guardian/Wellbeing Officer Signature:</b>		<b>Date:</b>
---	--	--------------