

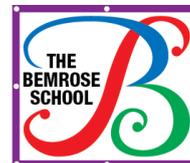


16-19 Bursary Fund Policy

Written by: Marcus Wesley

Role: Head of Post 16

Date: June 2019



Overview

This policy describes how the school will distribute the funds allocated by the government in a fair way to support students in undertaking Sixth Form study. The 16-19 Bursary Fund provides financial support to help students to participate in and benefit from a place in 16 to 19 education or training. The 16-19 Bursary Fund targets support towards the most financially disadvantaged 16 to 19-year olds - those who most need help with the costs of staying on. The Bemrose School will determine the eligibility criteria for discretionary bursaries, and the frequency of and conditions for payments for all awards. The 16-19 Bursary will only be awarded to a student that is eligible and facing genuine financial barriers to participating.

The Bursary is to support students with the cost of transport, sixth form dress code, educational books/equipment and educational trips; the school may retain a proportion of the bursary to purchase the resource directly on behalf of the student.

Types of Bursary

There are two types of Bursary available:

1. Bursaries of up to £1,200 for all young people in the following nominated vulnerable groups:

- Student is in or recently left local authority care
- Student gets Income Support or Universal Credit because they're financially supporting themselves
- Student gets Disability Living Allowance (DLA) in their name and either Employment and Support Allowance (ESA) or Universal Credit
- Student gets Personal Independence Payment (PIP) in their name and either ESA or Universal Credit

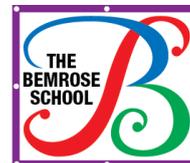
Students may get the full amount if they have expenses and study full-time on a course of at least 30 weeks.

They'll usually get less than the full amount, or no bursary, if one of the following apply:

- The course is shorter than 30 weeks
- They study part time
- They have few expenses

Applicants will need to bring supporting evidence.

- For students who are in care or a care leaver, written confirmation from the local authority that looks after them or provides their leaving care services



- For students getting Income Support or Universal Credit, a copy of their Income Support or Universal Credit award notice (they must be entitled to the benefits in their own right). The evidence must confirm that they can be in further education or training. If they're getting Universal Credit their institution will also need to see either a tenancy agreement in their name, a child benefit receipt, children's birth certificates or a utility bill.
- For students getting Universal Credit (UC)/Employment and Support Allowance (ESA) and Disability Living Allowance and Personal Independence Payments, a copy of the UC claim that confirms which ESA group they've been placed in. They will also need to provide evidence that they're receiving Disability Living Allowance or Personal Independence Payment.

2. Discretionary bursaries to young people facing genuine financial difficulties which may affect their participation in education.

Acceptable reasons

The level of discretionary bursary support provided will be dependent on the costs students can demonstrate they incur through their Sixth Form study. Examples of costs would include (but are not limited to)-

- Travel to and from school
- Travel to Open Days
- Personal Protective Clothing or necessary clothing required for a course.
- Books, materials and equipment needed for a particular course (such as for art or other practical subjects)
- The cost of educational visits related to courses.

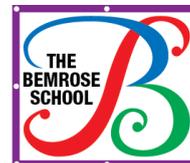
Application

Students with a family income of less than £21,000 can apply for a discretionary award on the form provided. These forms require details of costs that a student faces and of family income. The student's family is defined as the combined income of those people with whom the student usually lives.

To best allocate funds, students will need to have submitted their application forms with supporting evidence by the end of September at the start of the school year. The school recognise that family and individual circumstances can change, therefore applications can be made at any point within the school year. Awards can be made if there is still funding available.

Assessment and evidence of entitlement

The application form will be assessed by the Head of Post 16 and the level of payment decided. The application form requires certain proof of income and failure to provide this proof will usually result



in the refusal of an award. The maximum award will be dependent on the individual circumstances of each applicant but will not exceed £800 and the total awards will not exceed the funding made available to the school in any one financial year. Should valid requests exceed the amount the school has then a scaling will be applied to awards.

Payment of bursaries

Payments will be made by direct bank payment to the young person following the appropriate Derby City systems.

In some cases, 'in kind' payments may be more suitable; for example, transport passes for school buses, school trip payments, or equipment, such as scientific calculators, that the school is able to bulk buy and provide at lower prices. Students should return books and equipment at the end of their study programme to be used again by other students if these have been purchased 'in kind'. For example, if it is decided a graphical calculator is necessary for the student to complete their study programme, the school may purchase this with bursary funds. However, the student should return the equipment to the institution once they have completed their study programme so it can be re-used by another student.

Conditions of payment

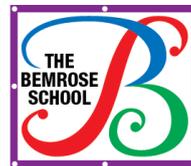
Payment is conditional on good attendance including punctuality. Good attendance means that student's attendance is above 95%. All absences must be properly notified and authorised by the school. Monthly attendance will be reviewed on each occasion, not overall attendance and decisions made for each month when payments are made.

Known absences (e.g. medical appointments, University visits etc.) should be notified to the Head of Post 16. Holidays during term time and prolonged medical absences will not be paid as the bursary is awarded to support participation in education.

Payment is also conditional of good approach to study. A good approach means that a student works consistently hard in class and endeavours to meet all independent study expectations and deadlines.

Behaviour in lessons, around the school and the local community in school hours are also conditions of payment and if concerns about a student's conduct are raised then bursary payments may be declined.

Where students have been absent for a period of 4 continuous weeks or more (excluding holidays, or if there is evidence that the student intends to return) and where students have made a decision to withdraw from a study programme bursary payments will be withdrawn. In rare instances, the school can take money back from students if they have not spent it for the reasons it was awarded to them. This will be done by withdrawing some money from future payments to repay this money.



In these cases, the school will consider fully the impact of such an action on the individual student before taking a final decision to do so.

Decisions

An appeal about any decision would be to the Executive Headteacher and then to the relevant governing body committee.

Audit

All application forms including the decision made will be kept for the appropriate period and an audit trail will be maintained on the finance system. A record of bursary applications and awards (including the number, value, purpose, whether awarded or not, and a brief justification for the decision) will be maintained. The application process, how the student was assessed, how they made the decision to award the specific amount of bursary and the funds that they have issued to the student will be documented.

Hard or scanned copies of documentation will be retained for 6 years (records can be kept electronically). Examples of documentation include:

For the bursary for vulnerable groups:

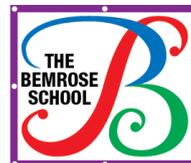
- a copy of the funding claim sent to SBSS
- evidence showing that the student is eligible, for example, a letter from DWP or the local authority or a copy of the student's online Universal Credit statement
- evidence of payments received from the SBSS, for example bank statements and remittance advices
- evidence of payments made to the student

For the discretionary bursary:

- Evidence used to assess eligibility, such as a letter from DWP or evidence of household income, including any copies of online statements for Universal Credit.
- a copy of the student's individual assessment of actual financial need
- receipts for in-kind purchases made, for example, bus pass, lunch receipts or book receipts

Recycling bursaries for vulnerable groups funding

If unused funding for bursaries for vulnerable groups during the academic year accrues. For example, if a student leaves early after only receiving part of their bursary or the school does not pay the full amount to a student because they did not meet the agreed conditions. These funds will be recycled and used to offset funding claims for other eligible students until 30 April 2020. For example, rather than claiming £1,200 for a newly identified student who meets the criteria for a bursary for vulnerable groups, the school may already have £700 that they claimed for a student who has now left. The school will recycle the £700 for the new student, claiming only £500 from the SBSS to give them the total amount of funding they need.



If the school holds enough funds to cover the costs of a bursary for vulnerable groups eligible student in full, the school will submit a funding claim form to the SBSS showing a zero amount. The school will add any funding for bursaries for vulnerable groups they have claimed, but no longer need, for eligible students to their discretionary bursary allocation from 1 May 2020.

Administration contribution

The school will use up to 5% of the bursary allocation for administrative costs.

Managing discretionary bursary underspends

In the first instance unspent bursary funds will be pooled, we will then look to use this on funding additional activities especially around HE, purchasing literature and study resources for the bursary student cohort.

Any money left over we then consider if there is the capacity to top slice 5% to school funds for admin but only if the pot is not spent. If there are still funds available after an administration contribution, the school will carry unspent bursary funds over to the next academic year. Any funds that are carried forward will be used to support the next cohort of discretionary bursary students.

Data Protection

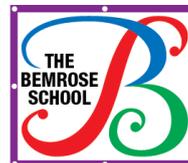
For the purposes of the Data Protection Act (DPA), the Department for Education is the data controller for any personal data that is given to the school. This personal data will be processed in accordance with the DPA, only used for the purpose(s) for which it is supplied to us and only shared with third parties where it is necessary for us to do so and the law allows it.

Appendices

Information for students

Application form

Further information on the bursary scheme can be found at <https://www.gov.uk/guidance/16-to-19-bursary-fund-guide-2018-to-2019-academic-year#discretionary-bursaries>



16-19 Bursary-Information for Year 12 and 13 students

What is the 16-19 Bursary Fund?

The fund is made available from the government through its funding body – Education Funding Agency (EFA) for 16-19 year olds. It is designed to help to provide assistance to students whose access to, or completion of, education is inhibited by financial constraints or barriers.

Guaranteed Award: Students aged at least 16 and under 19 years of age on 31/08/17 who are in care, are leaving care, are in **direct** receipt of Income Support (not a parent) or are disabled and in receipt of both Employment Support Allowance and Disability Living Allowance are entitled to a guaranteed award of £1200. If you fall into this category, please see the Head of Post 16.

Discretionary Award: If the income of the home in which you live is below £21,000 you may apply for a discretionary award. You can apply for help with books, stationery, equipment, travel, trips. If you would like to apply, ask the Head of Post 16 for an application form. You then need to fill it in and attach any required evidence and then return it to the Head of Post 16.

Amount of Awards

The amount of a discretionary award will depend on family income, individual circumstances and a student's choice of courses as certain options may include more costs. The maximum available to any one student in any one year will be £800, the amount available to the school in each year is limited.

When to Apply

You should make your application by the last school day in September. You may wish to apply later in the year if your home circumstances change or you have expenses that you were not expecting, funds will be allocated if you qualify if they are still available in the bursary fund.

How the money is paid

Money can **only** be paid into a bank account in your name. You will need to give these details on a separate application form. If the money is for a trip or for school books etc. the money will be transferred internally in school rather than paying you directly.

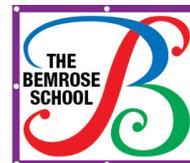
Year 13 students

If you applied last year, you will need to reapply this year and provide up to date evidence of your need.

Conditions of Payment



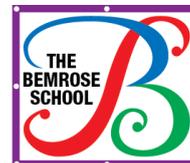
Payment is conditional on good attendance, good punctuality and a good approach to study. Bursary payments can be withheld if these conditions are not met.



Application for the Post 16 Bursary 2019/20- Confidential

Part 1. Student details		
First names	Surname/Family Name	
Date of Birth	Age on 31 August 2019	
Home address	Home telephone number	
	Mobile telephone number	
	Email address (if you have one and use it regularly)	
Postcode:		
Have you been resident in the UK and Islands for the whole of the three year period preceding your course? Yes <input type="checkbox"/> No <input type="checkbox"/> If 'No', please give the date you moved to the UK.		
Part 2. Parents' or guardians' details		
Surname	Title and first name	
Address (if different from above)	Contact telephone numbers:	
	Parents' email address:	
Postcode:		
Part 3. Household details		
Please state who you live with and their relationship to you		
Name	Relationship to you e.g. mother, father, brother, sister, partner etc	Age if under 16

If any of the following circumstances apply to you (the student applying), please tick the appropriate box:	
You are in receipt of Income Support or Universal Credit because you're financially supporting yourself	<input type="checkbox"/>
You're in or recently left local authority care	<input type="checkbox"/>
You get Personal Independence Payment (PIP) in your name and either ESA or Universal Credit	<input type="checkbox"/>
You get Disability Living Allowance (DLA) in your name and either Employment and Support Allowance (ESA) or Universal Credit	<input type="checkbox"/>
You have a combined household income of less than £21000	<input type="checkbox"/>
If you have a household income of less than £21,000	
What is your total household income?	



Part 4. Please indicate the help you require by detailing the amounts needed in the last column		
	<u>Amount</u>	<u>Frequency (e.g. per week/ month)</u>
Travel costs		
Sixth Form Dress code		
School meals		
Books		
Trips		
Equipment		
Other (state reason/s)		

Part 5. Evidence required to support your application (this needs to evidence the total household income value you have entered at the end of Part 3)

Receipt of Income Support by young person	An award letter which is less than three months old on the date of application
Disabled young person	A letter setting out the receipt of Employment Support Allowance and also in receipt of Disability Living Allowance
Looked After or Care Leaver	Written confirmation of your current or previously looked after status from the local authority which looks after you or provides your leaving care services
Household income under £21000	Universal Credit -The last three monthly universal credit statements of your parents /guardians Working Tax Credit / Child Tax Credit: Pages 1-4 of your parents'/ guardians' most recent Tax Credit Award Income from paid employment: a P60 for the last tax year or the last 3 months wage slips

Note: If you do not have the specified evidence, please contact the school to discuss possible alternative evidence options. You can also attach a letter outlining any special circumstances that may apply in your case.

Part 6. Declaration	
I certify that the information given above is correct and understand that the institution has the right to reclaim any funds and equipment costs, if I am found to have provided incorrect information or do not complete my course.	
Signature of parent/guardian or student if living independently:	Date:

REMEMBER: Your application will not be assessed **unless you give your full details and include documentary evidence asked for in Part 5**

Please return this form to: Mr M Wesley, Head of Post 16, The Bemrose School, Uttoxeter New Road, Derby. DE22 3HU

If you need any information or support please contact **Mr Wesley** on **01332 366711** or email **mwesley@bemrose.derby.sch.uk**

The 16-19 Bursary Fund is cash limited and can only be allocated whilst funding lasts.

Funding cannot be guaranteed in cases of over-demand. Failure to meet the requirements of the Sixth Form Contract can lead to loss of payments. In exceptional circumstances the awards are at the discretion of the head of the institution

The entitlement to the fund is conditional on meeting the 16-19 Bursary Fund criteria