



## Policy Statements and Procedures

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# 16-19 Bursary Fund Policy 2021-2022

### Introduction

#### What is the 16-19 Bursary Fund?

The 16 to 19 Bursary fund is a scheme made available from the government through the Department for Education for 16-19 year olds - to provide assistance to students whose access to, or completion of, education is inhibited by financial constraints or barriers. The 16-19 year old bursary scheme has been put in place as a replacement for the former Education Maintenance Allowance. There are two types of 16 to 19 bursaries: 1. Vulnerable bursaries of up to £1,200 a year for young people in one of the defined vulnerable groups; 2. Discretionary bursaries that institutions award to meet individual needs (discretionary bursaries are targeted on students who cannot stay in education without financial help for things like transport, meals, books and equipment).

#### 1. Aims

The Trust aims to:

- Have clear and transparent processes for the use and allocation of 16 to 19 bursary funds
- Make clear to parents, guardians, carers and students the type of support that is available and the means of applying for it
- Make clear to parents, guardians, carers and students the attendance and behaviour conditions for receiving the funds
- Educate students in developing sound financial management

#### 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](#).

As an Academy Trust, this policy complies with our funding agreement and articles of association.

#### 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 Academy Board**

The Academy Board has overall responsibility for approving this 16 to 19 bursary fund policy, but can delegate this to a committee, an individual governor or the Director of Post 16.

The Academy Board also has overall responsibility for monitoring the implementation of this policy.

At The Trust, responsibility for approving this policy has been delegated to a range of stakeholders:

- The Chief Officer of Operations
- The Principal Officer – Finance / Company Secretary

At The Trust, monitoring the implementation of this policy has been delegated to:

- The Director of Post 16
- The Senior Finance Officer

### **4.2 The Chief Officer of Operations**

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

### **4.3 The Director of Post 16**

The Director of Post 16 is responsible for implementing this 16 to 19 bursary fund policy consistently.

### **4.4 Parents, guardians and carers**

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

## **5. How The Trust 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 their 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

The Trust use the fund to provide students with support to fund:

- Transport to and from college campuses
- Lunch during the college day
- Textbooks, reading books and course-related costs
- Equipment and stationery
- Uniform in line with The Trust's dress code and policy
- Educational trips and visits
- Website subscriptions related to courses
- The cost of printing documents and resources
- The cost of sending UCAS applications
- The costs of attending university interviews and open days
- The cost of attending work experience placements and university-related programmes

## **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 plan (EHCP)

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 colleges, The Trust may use its 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, The Trust 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.

The Trust 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, The Trust 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, The Trust 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.

The Trust can use its 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. The Trust will also consider the number of hours involved in a student's study programme when deciding whether a pro-rata payment is more appropriate.

The Trust 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:

- Receipt of Income Support
- Receipt of Universal Credit
- Receipt of Working Tax Credit / Child Tax Credit
- Receipt of Income-based Employment and Support Allowance (ESA)
- Receipt of other Benefits/Pensions (please specify)
- Receipt of earned income with no additional benefits
- Receipt of Self-employed earnings with no additional benefits

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, The Trust will consider:

- Level of household income
- Engagement with Post 16 courses and Trust expectations
- Academic attainment
- Behaviour and attendance
- 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. The Trust 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 The Trust may request are:

- Previous 3 to 6 months' worth of pay slips;
- 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)
- An income support award letter which is less than 3 months old on the date of application
- The 3 most recent monthly award statements for Universal Credit
- Notice and evidence of your Independent Status (a tenancy agreement in the student's name, a child benefit receipt, children's birth certificates, utility bills etc.
- Pages 1- 4 of your most recent Tax Credit Award for Working Tax Credit or Child Tax Credit

- An award letter for Income-based Employment and Support Allowance (ESA) which is less than 3 months old on the date of application.
- An award letter for other Benefits and/or pensions (specified) which is less than 3 months old on the date of application.
- Proof of earned income with no additional benefits to include previous 3 monthly wage slips; or last 6 weekly wage slips; or 4 fortnightly wage slips.
- Proof of Self-employed earnings with no additional benefits via audited accounts or official tax return

## **7. Application and payment process**

### **7.1 Applications**

The Trust must carry out a financial assessment for each student applicant in order to establish their household income, whether there is an actual financial need and what kinds of costs the student has.

Applications should ideally be submitted before the October half term to allow enough time for The Trust to assess the overall level of demand and to make discretionary awards on a fair basis. This date will be clearly stated on the application form.

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

The 16-19 Bursary Fund Application has the following parts; all of which must be filled entirely for the application to be considered complete:

Part 1: Student's Details

Part 2: Parental Contact Details

Part 3: Household Details

Part 4: Circumstances

Part 5: Income Details (For Household)

Part 6: Evidence of Eligibility for Young People in 'Vulnerable Groups'

Part 7a: Attendance, Behaviour and Attainment Conditions and Declaration

Part 7b: Additional Payment Conditions and Declaration:

Part 8c: Correct Information Declaration

Part 9a: Bank Account Details

Part 9b: Ratification of Bank Account Details

Part 10a: Recommendation by the Director of Post 16

Part 10b: Support Statement for Discretionary Bursary (to be completed by Director of Post 16)

Part 11: Student Interview Outcome

Part 12: Final Decision

Part 4 must outline a student's actual financial needs and must therefore include the exact cost of items.

Acceptable	Unacceptable
<ul style="list-style-type: none"> <li>• Outlining the exact cost of items one intends on purchasing with the bursary fund</li> <li>• Including the establishment from which one intends on purchasing the item(s)</li> <li>• The item name</li> <li>• The intended use of the item</li> </ul> <p>For example:</p> <p><b><u>Trainline:</u></b> Standard train ticket from London to Leeds £59.00 To attend Leeds University Open Day</p> <p><b><u>HM</u></b> Derby shoes (Article No: 0834333001) £24.99 New school shoes to keep in line with The Trust's uniform policy</p> <p><b><u>Wilko</u></b> x4 Lever Arch File - £10.00 (£2.50 x4) A5 Notebook Blue - £2.00 STABILO Boss Highlighters 4 pack - £4.00</p> <p><b><u>Lunch from Rosedale College</u></b> £2.30 x 5 days of the week = £11.50</p> <p><b><u>Pearson BTEC</u></b> Revise BTEC National Business Revision Workbook - £10.99</p> <p><b>Total: £122.48</b></p>	<ul style="list-style-type: none"> <li>• Simply listing what one might purchase with the bursary fund</li> <li>• Vague and evasive language such as 'stationery', 'uniform' or 'books.'</li> </ul>

Part 11 is an interview, held by the Director of Post 16 with the student applicant, to ensure that the student understands and agrees to the terms and conditions of the 16-19 bursary fund.



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 their home college's complaints procedure.

## 7.2 Payment process

Payments are made using the following process:

- In the first instance, The Trust will endeavour to pay bursaries in-kind rather than cash, as far as possible. This helps ensure that the bursary is spent for the reasons it was awarded. In-kind payments can include travel passes, vouchers or credits for meals, required books and required equipment.
- The Trust insists that students only spend the bursary payments on the support that has been identified as necessary to help them participate in education. This means that students can only use the funds to pay for travel costs and/or a meal during the day, to buy equipment or any other support that has been agreed.
- The bursary payments must be paid into the students' account and **not** into another person's account, except in exceptional circumstances where a student is unable to administer their own account. If the student cannot manage their own funds, The Trust will consider and identify an appropriate adult who will manage the bursary on the student's behalf.
- Payments will be made on a bi-weekly basis by BACS transfer to the student's own bank account.
- It is the student's responsibility to ensure that debit card details provided as part of the application are their own, and match the details on the card itself.
- Students' debit cards will be checked as part of the application process, and this is to ensure that details provided on the application form match the details on the card. In cases where there are discrepancies, the bursary application may be rejected.

## 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:

Insert details of standards/conditions, such as:

- Attendance above a 98% for morning registration, all lessons and Mentor Meetings (where applicable)
- Attendance to Trial Examinations
- Following the Home College's Behaviour and Relationships Policy and Procedures
- The quality of work produced across all subject areas and the ability to meet deadlines set
- Displaying a positive attitude towards learning and strong work ethic
- Appropriate use of Study Periods
- Comments from form tutors, subject teachers and Post 16 Mentors in regards to attendance, behaviour, work ethic and attitude.

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, however The Trust 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.

The Trust 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.

In cases where The Trust purchases books or equipment for a student, the student must return these at the end of their study programme for reuse, where appropriate.

The Trust reserves the right to reclaim bursary payments from students if they have not spent it for the reasons it was awarded to them.

The Trust 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, guardians and carers must notify the Director of Post 16 without delay.

The Trust recognises that students' circumstances and actual financial needs may change from the time the 16-19 bursary application form was submitted. For example, new costs may arise that were not initially factored into potential expenditure, such as new uniform needs and university interviews. In cases such as this, students can apply for a Revision of Needs form for consideration.

Eligibility will not roll over; The Trust will ensure students' eligibility each year as circumstances and needs change. Where a student receives bursary payments for one academic year, this will not automatically continue to the next academic year, and the student is expected to apply again, with new and up-to-date evidence.

## **9. Record keeping**

Any paperwork and documents The Trust retains 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 and GDPR notice. These can be accessed via the individual college websites.

Successful applicants are required to submit receipts as evidence of purchases.

The Director of Post 16 will carry out regular audits to ensure that the 16 to 19 bursary fund is being used appropriately.

## **10. Links with other policies**

This policy links with the:

- Admissions/Post 16 Policy
- Anti-Bullying Policy
- Behaviour and Relationships Policy
- Bullying and Harassment Policy
- Data Protection
- Exclusion Policy
- GDPR notice
- Home/College Agreement
- Managing Student Attendance Policy
- TRHAT Information Sharing GDPR Policy

Date	Change(s) Made	Change Author
September 2018	Policy created	Aisha Patel, TRHAT Director of Teaching and Learning, Post 16 Heidi Faure, TRHAT Chief Officer, Operations
September 2021	Policy reviewed and edited	Aisha Patel, TRHAT Director of Teaching and Learning, Post 16 Heidi Faure, TRHAT Chief Officer, Operations

This policy will be due for review in September 2022.