

## 2022-23 16 TO 19 BURSARY FUND

### 1. AIMS

1.1 Our school 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

2.1 This policy is based on advice from the Education and Skills Funding Agency (ESFA) on the [16 to 19 bursary fund for the 2022 to 2023 academic year](#).

### 3. DEFINITIONS

- **In care**

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). A young person placed with a foster carer by the local authority, including where the foster carer is on the books of an independent fostering agency, is classed as looked after. They meet the criteria for the 'in care' vulnerable group where they need financial support to participate. A child who is privately fostered (in other words, a private arrangement is made between the parent and the person who will care for the child) is not classed as a looked after child and is not eligible for the bursary for vulnerable groups.

- **Looked after child**

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**

- 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. USING THE BURSARY FUND

4.1 Financial support is available to eligible students from the 16 to 19 bursary fund. See sections 5 and 6 below for details of our eligibility criteria.

4.2 There are two types of 16 to 19 bursaries that students may apply for:

- Bursaries for students in vulnerable groups defined by the DfE in its guidance documents; and
- Discretionary bursaries which are provided on the basis of the eligibility criteria set by the school, albeit in line with the DfE funding guidance.

4.3 Students may only apply for one bursary fund, and the application must be made afresh each academic year in accordance with the school's policy that applies for that academic year.

4.4 Both types of bursary funding are designed to help students overcome the individual financial barriers to participation that they face, and the school ensures the funds go to those who genuinely need them. No student should automatically be awarded a set amount of funding without an assessment of the level of financial need they have. Therefore, the school must ensure it assesses the actual financial needs of individual students when awarding bursary funding. The school must not make flat rate/fixed rate payments to students without considering individual student actual financial needs.

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

1. Public transport to / from school via termly or monthly bus passes.
2. School uniform / sports kit (i.e. not casual clothes).
3. Textbooks and study materials.
4. Curriculum materials and equipment e.g. consumables etc.
5. Any additional examination fees including re-sits if applicable.
6. Music tuition fees for tuition organised by the school.

7. Reasonable cost of ICT equipment for a laptop used solely by the student. No contribution will be made for mobile devices.
8. 100% of the costs of trips essential to each student's study programme necessary to fulfil curriculum requirements .e.g. field trips for Biology and Geography A Level
9. Travel and lunch when attending university interviews, open days or visits. Overnight trips will not be supported unless there are exceptional circumstances.
10. Daily credit to purchase food in school. The value of the allocation is at the school's discretion but will be guided by the value of the school's free school meals allocation. If an amount is payable towards school meals then any unused amounts will not be carried forward.
11. Sixth form year books, clothing (e.g. hoodies or t-shirts) and contributions to prom tickets (no other prom related expenditure) such that this supports inclusion.
12. Any other items are at the school's discretion and must be focussed upon removing barriers to learning.

4.6 Where the school purchases items and equipment such as books, study materials, computers etc. these must be returned by the student at the end of their study programme so they can be used again by another student where appropriate. The school may insist that an item is always retained on the school site if it believes that is the best way of ensuring it is secure. There may be circumstances where the school decides to dispose of an asset, and where this is the case, it should be managed through the Trust's asset disposal process.

4.7 The bursary fund is not intended to:

- provide learning support or other services that institutions give to students - for example, counselling, mentoring or extra tutoring.
- support extra-curricular activities where these are not essential to the student's' study programme.
- support general household incomes.

4.8 The school will not use the bursary fund in any way that would give it a competitive advantage over other institutions including:

- fees for access to facilities in the institution.
- universal (i.e. applying to all students) subsidy of the canteen.
- universal (i.e. applying to all students) subsidy of transport, or support for travel for all students regardless of family incomes.
- universal (i.e. applying to all students) provision of equipment, material or books.
- making bonus payments to reward attendance or achievement.
- payments to support students' general living costs.

4.9 The school must not use the bursary as a way of incentivising attendance or as a marketing tool to encourage students to choose the school over another.

## **5. ELIGIBILITY CRITERIA FOR BURSARIES: AGE, EDUCATION PROVISION, RESIDENCY AND ASYLUM STATUS**

### **5.1 Overview**

5.1.1 Both the vulnerable and discretionary bursary funding streams share the same eligibility criteria in relation to age, education provision, residency and asylum status. These are set out in sections 5.2 to 5.5 below and given that they are derived from the DfE's funding guidance, the school will not deviate from this set of criteria. In relation to household income and benefits there are separate criteria for the vulnerable and discretionary bursary funds and these are set out in section 6.

### **5.2 Age**

5.2.1 Students must meet the following age criteria to be eligible for help from the bursary fund:

- A student must be aged 16 or over but under 19 at 31 August 2022 to be eligible for help from the bursary fund in the 2022 to 2023 academic year.
- Students aged 19 or over are only eligible to receive a discretionary bursary if they are continuing on a study programme they began aged 16 to 18 (19+ continuers) or have an Education, Health and Care Plan (EHCP).
- These 2 groups of aged 19+ students can receive a discretionary bursary while they continue to attend education (in the case of a 19+ continuer, this must be the same programme they started before they

turned 19), as long as their eligibility continues and their institution considers they need the support to continue their participation.

- Students aged 19 or over are not eligible for bursaries for vulnerable groups.
- The school should generally only pay bursaries to students aged 16 or over. However, in exceptional circumstances where under 16 students are on funded 16 to 19 study programmes at the school, they may use their discretion to pay bursaries to younger students. For example, where a student is following an accelerated study programme. Bursary funds should not be awarded to students enrolled at another institution, where that institution also receives public funding for the student, for example, students aged 14 to 16 who are attending college as part of their key stage 4 programme at a local school/academy. Paragraphs 44 to 48 of the ESFA funding regulations for post-16 provision provide more detail about funded 14 to 16 year olds.
- Students aged under 19 enrolled on higher education qualifications are not eligible for support.

### **5.3 Education Provision**

5.3.1 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

5.3.2 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

5.3.3 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, RET schools will provide support in-kind, such as a travel pass, details of which shall be decided on a case-by-case basis.

### **5.4 Residency**

5.4.1 Students must meet the residency criteria in the [ESFA funding regulations for post-16 provision](#).

### **5.5 Asylum Seekers**

#### **5.5.1 Accompanied Asylum Seeking Children (Under 18 with an Adult, Relative or Partner)**

5.5.1.1 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.

5.5.1.2 The school will provide in-kind support such as books, equipment and a travel pass to asylum seekers who have not had asylum refused.

#### **5.5.2 Unaccompanied Asylum Seeking Children**

5.5.2.1 Unaccompanied asylum seeking children do not receive cash support from the HO and are the responsibility of the local authority. They are treated as looked after children and are eligible for a bursary for vulnerable groups ('in care' group), where they have a financial need.

5.5.2.2 When these students reach 18 years old, the school 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. ELIGIBILITY CRITERIA FOR BURSARIES: INCOME RELATED**

6.1 The two types of bursaries that students are entitled to, the vulnerable students and discretionary bursary, have separate eligibility criteria in relation to income / benefits. The maximum level of funding to which students are entitled is also different for the two bursary types. Full details of the income / benefits eligibility criteria, the evidence required to demonstrate compliance with the criteria, and the maximum amount to be awarded is shown in the table below.

Bursary Type	Eligibility Criteria (in addition to 5. above)	Evidence Required	Amount Awarded
Vulnerable	In care (privately fostered students are not classed as looked after). Care leavers.	A letter/email from the relevant Local Authority. This must be on headed paper, or from a local authority email address.	Where a bursary is provided, the funds will generally be up to £1,200 per year for study programmes lasting 30 weeks or more.
	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.	A copy of your Income Support award notice or a copy of your 3 most recent monthly Universal Credit award statements. (You should be able to print off details of your award from your online account).	
	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.	A copy of your 3 most recent monthly Universal Credit award statements. (You should be able to print off details of your award from your online account). Evidence of receipt of Disability Living Allowance or Personal Independence Payment, must also be provided.	
Discretionary	Students whose gross household income is less than £25,000 as assessed by HMRC.	<p>No evidence is required if the school has confirmation of your Free School Meals entitlement.</p> <p>Otherwise a letter / award notice confirming your entitlement to benefits from one of the following:</p> <ul style="list-style-type: none"> <li>• Job Centre Plus</li> <li>• Department for Work and Pensions</li> <li>• Your local authority</li> <li>• Her Majesty's Revenue &amp; Customs e.g. your Tax Credit Award Letter for the last financial year that shows your income. You must provide the full award letter.</li> </ul> <p>Any letter provided to us should be dated within the last 3 months. If your letter is older than 3 months, please provide a recent bank statement showing a relevant payment going in to your account within the last 3 months. Any letter provided must confirm the name and address of the person receiving the benefit(s).</p> <p>If you, or you parent(s)/carer(s) are not in receipt of benefits but are employed/self-employed with a gross income of £25,000 p.a. or below we need one of the following for each parent / carer:</p> <ul style="list-style-type: none"> <li>• The most recent 3 months' pay slips</li> <li>• P60 for the latest tax year</li> <li>• Evidence of self-employed income, e.g. tax return or accountant's letter</li> </ul>	<p>Where a bursary is provided, the funds will generally be up to £1,000 p.a. for study programmes lasting 30 weeks or more.</p> <p>The amount received is also determined by the total number of students who successfully apply for funds. The Bursary fund is a finite amount and, in cases where there are high numbers of eligible students, each student may receive less than the maximum. The school will seek to ensure total payments do not exceed the amount of funding provided by the DfE. The school will also retain 5% of the discretionary funding received for the administration of the fund.</p>

**Notes for Vulnerable and Discretionary Bursaries.**

- Students who meet the criteria for a vulnerable groups bursary for may be entitled to a bursary, but students will not receive an award under the bursary if they do not have any actual financial need.
- 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.
- Any student receiving a bursary must inform the School should their financial circumstances, or those of their parent/guardian/carer(s) change. This does not automatically mean any future bursary payments will be stopped but would result in a review to determine whether the payments continue or be stopped and the funds redistributed.
- When calculating the amount to which students should receive, 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 p.a. or £1,000 p.a. for the vulnerable and discretionary bursaries respectively 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 p.a. or £1,000 p.a. for the vulnerable and discretionary bursaries respectively if this is necessary 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.
- If a student lives between two homes we only need information from the person they live with for the majority of the time. The address the student gives on your application must match the address we hold for them on in our records, and match the address on any evidence they provide. The school may exercise its discretion in determining which households should be included in any assessment of income.
- The school may exercise its discretion with regard to eligibility or the value of awards where the school believes there has been any change in a student's circumstances or financial needs.

## 7. APPLICATION AND PAYMENT PROCESS

### 7.1 Applications

7.1.1 Applications should ideally be submitted in accordance with the timetable set by the school to allow enough time for the 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.

7.1.2 However, we acknowledge that students' circumstances may change and therefore the application process will remain open for the whole school year such that students can make an application throughout the year. Where students have made a successful application, and either their circumstances change or their need for funding changes, they are entitled to make supplementary applications such that the amount awarded is amended by the school.

7.1.3 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.

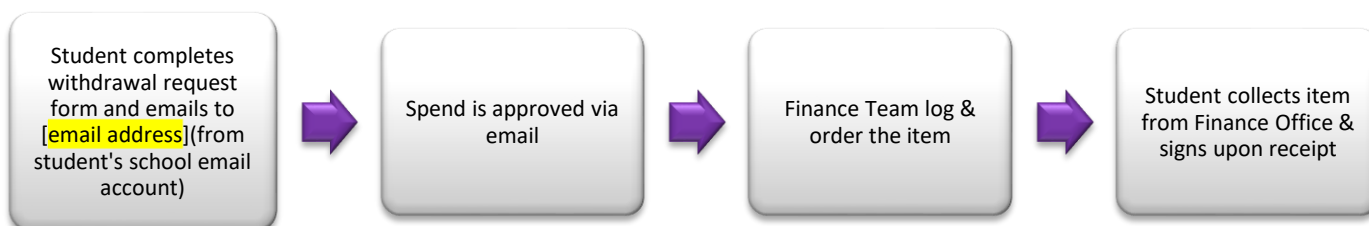
### 7.2 Payment Process

7.2.1 The school will 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.

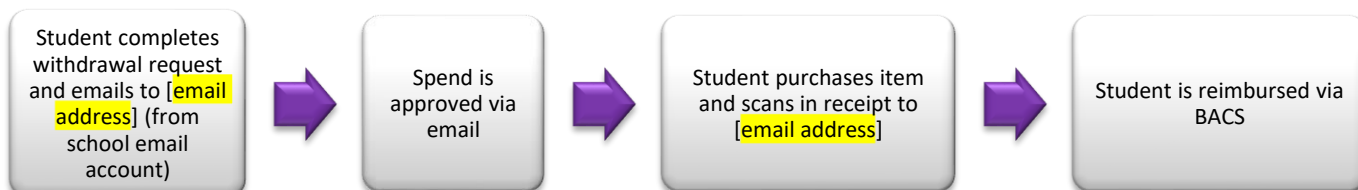
7.2.2 The school will make the value of the award and any terms/conditions clear to the student in their award letter. Any variations or additional allocations will also be covered by an award letter.

7.2.3 Payments are made using the following process.

#### School purchases upon student's direction (preferred option)



#### Student buys item and then refunded



7.2.4 The school will not make bursary payments to another person's account, unless there are exceptional circumstances where a student is unable to administer their own account. If the student cannot manage their own funds, the school will need to consider who will manage the bursary on the student's behalf.

### 7.3 Conditions for the Receipt of Bursary Payments

7.3.1 Payments of the bursary are conditional on students meeting the following conditions in relation to their standards of attendance and behaviour. If a bursary application is successful, to continue to be in receipt of any awarded funds students should have 100% attendance unless any of the following authorised leave in advance occurs:

- Medical appointments that cannot be arranged outside school hours (supported by an appointment card)
- Religious festival
- Visit(s) to university for an interview or open day
- Any unpaid work experience placement that is an integral part of your course
- Attendance at the funeral of a relative or close friend

- Study Leave
- Medical evidence for any prolonged illness or absence. If any absence is longer than 4 weeks then bursary will cease to be paid.

7.3.2 If, having allowed for the factors identified above in section 6.3.1, attendance falls below 95% the school reserves the right to withdraw the eligibility for bursary funding.

7.3.3 Persistent lateness to lessons and other school activities such as tutor time may also result a student's bursary being withdrawn. Students must arrive to every lesson on time. Punctuality will be determined by the register mark taken at the beginning of each lesson.

7.3.4 The school 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.

7.3.5 All sixth form students must always meet the school's standards for behaviour or funding may be withdrawn.

7.3.6 Where the school, having taken account of the conditions set out in section 6.3, determines that students may have their payment withheld, the school 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.

7.3.7 The school reserves the right to take back money from students where it is not spent for the reasons it was awarded.

7.3.8 The school will consider the impact of withdrawing funding on the individual student before taking a final decision to do so, and any decision will be confirmed to the student in writing.

7.3.9 Where the school purchases books or equipment for a student, the student must return these at the end of their study programme so they can be used again by another student where appropriate. If keeping equipment on the school site is the best way of ensuring this happens, the school has the right to set this as a condition of funding.

## **8. RECORD KEEPING**

8.1 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 and privacy notices which are available on the school's website.

## **9. MANAGING COMPLAINTS OR APPEALS**

9.1 Any student or parent who is unhappy with how an institution has handled their application for bursary funding should follow the school's own complaints procedure.

9.2 The school should handle the escalation of complaints about the bursary fund in the same way as any other complaint they may receive.

## **ANNEX 1: Financial Accounting and Compliance**

### **A. Financial Accounting**

#### **A1.1 Receiving Vulnerable Bursary Funds and Allocating to Student Accounts**

1.1.1 All vulnerable student bursary funds received by the school should be coded to the nominal code (XXX9507) on the relevant student code i.e. the student for whom the application for funding has been made.

#### **A1.2 Receiving Discretionary Bursary Funds and Allocating to Student Accounts**

A1.2.1 All discretionary bursary funds received by the school should be coded to the nominal code (XXX9506) on the 'For allocation' code.

A1.2.2 When the school makes an award of an amount of discretionary bursary funds to a student and issues an award letter, the school should journal the equivalent amount from the 'For allocation' code on nominal code (XXX9506) to the relevant student code.

#### **A1.3 Expending Bursary Funds**

A1.3.1 When either vulnerable or discretionary funds are expended the following two steps should be taken:

1. The purchase should be coded against the student code on either (XXX4128) for discretionary bursary funding or (XXX4129) for vulnerable bursary funding.
2. An entry to the same value should be journaled from the balance sheet code for either the discretionary or vulnerable bursary fund to the matching income code for either the discretionary (XXX1081) or vulnerable bursary fund (XXX1082).

### **A2. Reporting on the Use of Bursary Funding in School**

A2.1 Every month the school's Head of 6<sup>th</sup> Form should be issued with a report showing the total funds held by the school for discretionary and vulnerable bursary funding, together with the amount allocated and spent for each student that has been awarded funds.

### **A3. Unspent Bursary Funds**

A3.1 The DfE permits institutions to carry unspent bursary funds over to the next academic year. Any funds carried forward must continue to be used to support students in line with the DfE's funding rules. The funds cannot be drawn into general school funds.

A3.2 The school must fully make use of any unspent funds for either discretionary or vulnerable bursary funding before using their new academic year allocation.

A3.3 Discretionary and vulnerable bursary funding cannot be carried forward for more than one year. The school must inform the DfE of the total amount of any unspent funds (not previously reported) from any year up to and including the preceding academic year by using the online enquiry form no later than 31 March each year.

### **B. Financial Compliance**

B2.1 The school must be able to evidence the following audit trail for every application and award:






- Completed application forms for all bursary applications.
- Evidence of all required documentation supporting bursary applications. The school should maintain evidence of documentation for 7 years.
- Completed financial assessment forms for all successful bursary applications. Note that where additional funds are allocated, there must be a supporting financial assessment application form to the value of the additional funds allocated.
- Award letters issued to students matching every financial assessment. Note that where additional funds are allocated, there must be a supporting award. Note that where additional funds are allocated to a student, there must be a supporting additional award letter issued to the relevant student.
- Supporting documentation for all exceptional issues e.g. clawback of funds for misuse, ending of funding due to a student leaving a course etc.


B2.2 The total amount allocated to students for discretionary and vulnerable bursary funding and recorded on PS Financials must equal the total allocated via the financial assessment documentation. If there are any differences these should be reconciled by the school.

B2.3 The year-end process is dealt with by the separate audit year-end guidance. However, the process is reliant upon implementing the steps set out in this guidance note.



## ANNEX 2: APPLICATION PROCESS AND BURSARY ADMINISTRATION

APPLICATION AND APPROVAL						
Term 1		Term 2, Week 1	Term 2, Week 2	Term 2, Week 3	Term 2, Week 3	
<p>School issues 6<sup>th</sup> form bursary funding fact sheet to all 6<sup>th</sup> form students.</p>  <p>6th Form Bursary Fund Fact Sheet.docx</p>	<p>Student applies using application form.</p>  <p>Application for 6th Form Bursary Funding</p>	<p>School finance lead and Ho6th review applications and confirm eligibility</p>	<p>Student financial assessment completed by [postholder] and student.</p>  <p>Financial Assessment Document for 6th For</p> <p>When an additional allocation is made to a student, the same form should be completed to the value of the additional award.</p>	<p>Ho6th and school finance lead review all applications and assessment and decide awards (10% left in fund for emergency cases and 5% of discretionary fund held for administrative costs).</p>	<p>[Postholder] writes to student and parents/carers to advise of total award and process for purchases.</p>  <p>Bursary Fund Award Letter 160222.docx</p> <p>Where students are awarded additional funds after an initial award they should be issued with the following letter.</p>  <p>Additional Bursary Fund Allocation Letter</p>	<p>Finance team set up student file and update central log to manage bursary</p>

SCHOOL PURCHASES (preferred, compulsory for books & IT equipment)			
Student completes withdrawal request form and emails to [email address] (from student's school email account)	Spend is approved via email	Finance team log and order the item	Student collects item from finance office and signs upon receipt
			

STUDENT PURCHASES (prior approval needed)			
Student completes withdrawal request and emails to [email address] (from school email account)	Spend is approved via email	Student purchases item and scans in receipt to payments@becketkeys.org	Student is reimbursed via BACS
