

16-19 Bursary Fund Policy

Policy Code:	F5
Policy Start Date:	September 2021
Policy Review Date:	September 2022

Please read this policy in conjunction with the policies listed below:

- HR6 Data Protection Policy
- HR8B Equal Opportunities and Diversity Policy for Students and Parents/Carers
- HR33 Records Management Policy
- SW9 Parental Communication and Complaints Policy

1 Policy Statement

- 1.1 The 16-19 Bursary Fund is made available from the government through its funding body, the Education and Skills Funding Agency (ESFA), to provide assistance to 16-19 year old students whose access to, or completion of, education is inhibited by financial constraints or barriers.
- 1.2 This policy outlines the manner in which the 16-19 Bursary Fund will be managed and adheres to the ESFA guidance 16 to 19 bursary fund guide 2021 to 2022 academic year.
- 1.3 References to the Trust or Academy within this policy specifically include all primary, secondary and special academies within the Trust as well as the Early Years setting at the Priory Witham Academy, Priory Training and Lincolnshire SCITT.
- 1.4 This policy does not form part of any employee's contract of employment and it may be amended at any time.
- 1.5 The Trust is committed to leading a mentally healthy organisation, which includes a commitment to and promotion of emotional wellbeing and mental health. Therefore, all Trust policies and procedures ensure this commitment is incorporated in order to support all staff and students. Members of staff are encouraged to speak to their line managers, and students are encouraged to speak to any member of staff, if they feel any part of this policy would affect their emotional wellbeing and mental health. Any such comments should be passed to the Trust's HR department (via FederationHR@prioryacademies.co.uk) for appropriate consideration at the next available point in the policy review cycle.

2 Roles, Responsibilities and Implementation

- 2.1 The Finance Committee has overall responsibility for the effective operation of this policy and for ensuring compliance with the relevant statutory framework. This committee delegates day-to-day responsibility for operating the policy and ensuring its maintenance and review to the Chief Finance Officer.
- 2.2 Leaders and Managers have a specific responsibility to ensure the fair application of this policy and all staff are responsible for supporting colleagues and ensuring its success.

3 Aims

- 3.1 To provide financial support to help students overcome the specific financial barriers to participation they face so they can remain in education.

4 Funding Outline

4.1 Funding is split into four types –

- Vulnerable Bursary
- Discretionary Bursary
- School Meal Allowance
- Laptop Loan

4.2 **A vulnerable bursary** may be available for students who meet the following criteria:

- Is a young person in care
- Is a young care leaver (previously in care or foster care)
- Is in receipt of Income Support or Universal Credit in their own right and are financially supporting themselves and anyone who is dependent upon and living with them
- Is in receipt of Disability Living Allowance or Personal Independence Payments in their own right as well as Employment and Support Allowance or Universal Credit in their own right
- Each student will receive a letter confirming whether or not their application has been successful, along with a breakdown of payments they will receive and when.
- If successful, payment frequency and amounts are evaluated based on individual students' needs. These may be either in a single payment, monthly payments or a mix of both.
- Students will need to submit a breakdown of funding requirements in order to establish the amount of funding needed.
- The bursary will only be paid if the student has attendance of 85% and above.

Meeting the above criteria for the Vulnerable Bursary does not automatically mean funding will be awarded. Only students with an actual financial need may be awarded funding support. The Trust may decide that although a young person may be eligible for a bursary because they are in one or more of the defined vulnerable groups, they do not have any actual financial need. This might be because their financial needs are already met and/or because they have no relevant costs. The Trust can refuse a student's application on this basis. Similarly, students will only receive the amount they actually need to participate.

4.3 **The discretionary bursary** is for students who need financial help but do not qualify for a bursary for students in vulnerable groups.

To qualify for the discretionary bursary your total household income per year must be less than £24,652.00.

- Payment frequency and amounts are evaluated based on individual students' needs. These may be either in a single payment, monthly payments or a mix of both.
- Each student will receive a letter confirming whether or not their application has been successful, along with a breakdown of payments they will receive and when.
- The bursary will only be paid if the student has attendance of 85% and above.

4.4 School Meal Allowance - Students can apply to receive a daily school meal allowance if they received FSM in Year 11 and/or Y12, or meet the following criteria:

Students in receipt of, or whose parents are in receipt of, one or more of the following benefits:

- Universal Credit (provided you have an annual net earned income of no more than £7,400, as assessed by earnings from up to three of your most recent assessment periods)
- Income Support
- Income-based Jobseeker's Allowance
- Income-related Employment and Support Allowance
- Support under Part VI of the Immigration and Asylum Act 1999
- The guarantee element of Pension Credit
- Child Tax Credit (provided you're not also entitled to Working Tax Credit and have an annual gross income of no more than £16,190)
- Working Tax Credit run-on – paid for four weeks after you stop qualifying for Working Tax Credit

4.5 Laptop Loan - Loan of a Bursary laptop is available to any sixth form student who does not have access to computer equipment at home. There are no additional criteria required in such cases. Please contact your Head of Sixth Form to make an application.

5 Eligibility

5.1 Age

5.1.a Students must meet the age and residency criteria which follow to be eligible for help from the bursary fund.

5.1.b A student must be aged 16 or over but under 19 at 31 August 2021 to be eligible for help from the bursary fund in the 2021 to 2022 academic year.

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- 5.1.c 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).
- 5.1.d 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 the Trust considers they need the support to continue their participation.
- 5.1.e Students aged 19 or over are not eligible for bursaries for vulnerable groups.
- 5.1.f The trust will only pay bursaries to students aged 16 or over. However, in exceptional circumstances institutions may use their discretion to pay bursaries to younger students, for example, where a student is following an accelerated study programme.
- 5.1.g Students aged under 19 enrolled on higher education qualifications are not eligible for support.

5.2 Eligible Education Provision

- 5.2.a Students must be participating in provision that is subject to inspection by a public body that assures quality (for example Ofsted). The provision must also be either:
- a 16 to 19 traineeship programme
 - funded directly by ESFA or by ESFA via a local authority
 - funded or co-financed by the European Social Fund
 - otherwise publicly funded and lead to a qualification (up to and including level 3) accredited by Ofqual or on the ESFA list of qualifications approved for funding 14 to 19
- 5.2.b Students on apprenticeship programmes, or any waged training, are employed, rather than in education. They are not eligible for the 16 to 19 Bursary Fund.
- 5.2.c Non-employed students aged 16 to 19 who are participating in a Prince's Trust Team Programme are eligible to receive the bursary in the same way as any other student participating in an eligible, publicly funded course.
- 5.2.d The Trust does not expect students on distance learning provision to need help from the bursary fund because they do not have the kinds of costs the bursary is intended to cover (travel, equipment and uniforms, for example). In the rare instances where the Trust identifies such a student does require financial help,

they should provide support in-kind. An example could be providing a temporary travel pass for the student to attend exams.

- 5.3 Residency - Students must meet the residency criteria in ESFA funding regulations for post-16 provision. In line with these regulations the trust may be required to request evidence to support this.
- 5.4 Eligibility criteria: bursaries for young people in defined vulnerable groups
Students who meet the criteria, and who have a financial need, can apply for a bursary for vulnerable groups. The defined groups reflect that these students are unlikely to be receiving financial assistance from parents or carers, so may need a greater level of support to enable them to continue to participate. Students will be awarded the amount of support they need to participate based on an assessment of the types of costs they have. The Trust will ensure students are eligible for the bursary for defined vulnerable groups in each year they require support.
The defined vulnerable groups are students who are:
- in care
 - care leavers
 - receiving Income Support, or Universal Credit 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
 - receiving Disability Living Allowance or Personal Independence Payments in their own right as well as Employment and Support Allowance or Universal Credit in their own right
- 5.5 The Trust may decide that although a young person may be eligible for a bursary because they are in one or more of the defined vulnerable groups, they do not have any actual financial need. This might be because their financial needs are already met and/or because they have no relevant costs. The Trust can refuse a student's application on this basis. Similarly, students will only receive the amount they actually need to participate.
- 5.6 Further criteria by which bursary funds will be made available is explained in Section 4. In order to apply, you must be able to provide evidence of the household income. The student must also have their own bank account into which the money can be transferred, and the bursary will only be paid if the student has over 85% attendance.

6 Applications and Payment Process

- 6.1 Students should apply for a bursary by Friday 17th September 2021. Applications may be received after this date but in this case, payments may be awarded on a pro-rata basis (unless receipts can be provided of expenditure already incurred) if the September deadline is missed. Students must apply for

funds for specific educational purposes. Applications, which are incomplete or are missing evidence will be classed as late submissions. Once the applications are complete, from this date they will be reviewed and also may be awarded on a pro-rata basis (unless receipts can be provided of expenditure already incurred).

- 6.2 All applications must be submitted to the member of staff responsible for the 16-19 bursary at each academy who will then submit to the Finance Department.
- 6.3 The Finance Department will check each application to assess whether all criteria is met. Exceptions may be made under exceptional circumstances and will be taken into account on each individual application.
- 6.4 Students will be informed in writing of the decisions of the Finance Department.
- 6.5 The student can then use this money to support their continued education by putting it towards the transport costs, uniform, work materials and equipment etc.
- 6.6 Bursary payments are transferred directly into student's bank accounts. Payments should not be made into another person's account, except in exceptional circumstances where a student is unable to administer their own account. Payments may be made to a joint account, as long as the student is one of the account holders
- 6.7 Bursaries may also be paid 'in kind'. Such items will be provided to the named individual. In the case of books or equipment we ask they be returned at the end of the course.
- 6.8 In determining payments of the 16-19 Bursary Fund students will not be discriminated against on the basis of their protected characteristics. Payments are also subject to the public sector equality duty in section 149(1) of the Equality Act.

7 Funding

- 7.1 Transport – Students can request to apply for a Post-16 Travel Pass from Lincolnshire County Council where if the student meets Lincolnshire County Councils eligibility criteria, the Bursary Fund will cover this cost. Either the school can arrange to pay this directly with the School Transport Team, or the student will be reimbursed on provision of receipts. Please see www.lincolnshire.gov.uk/roads-transport/apply-post-16-transport for further information.

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- 7.2 Other Transport Cost – Students who require funding support for transport costs other than the Post-16 Travel Pass must live more than 1.5 miles from their school.
- 7.2 Uniform & Specialist Uniform – Uniform to meet the school’s standard dress code may be funded up to a maximum of £250.00. This is to include all uniform i.e. suit or equivalent, shoes, shirts, bag etc. Any specialist uniform required for a specific course, which costs more than £250.00, may be funded however, this will be assessed on each individual case.
- 7.3 Laptops are available for loan to students who do not have access to IT equipment at home to support their studies. Please contact the Head of Year to apply.

8 Policy Change

- 8.1 This policy may only be amended or withdrawn by the Priory Federation of Academies Trust.



The Priory Federation of Academies Trust

16-19 Bursary Fund Policy

This Policy has been approved by the Finance Committee:

Signed..... Name..... Date:

Trustee

Signed..... Name..... Date:

Chief Executive Officer

Signed..... Name..... Date:

Designated Member of Staff

Please note that a signed copy of this agreement is available via Human Resources.