

RMET

16-19 Bursary Fund Policy

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Document Change History

Date:	Version:	Description of Changes:
December 2023	2.0	Full review

1. Introduction

- 1.1. The fund is made available from the government through its funding body – Education Skills and Funding Agency (ESFA) for 16-18 year olds – to provide assistance to students whose access to, or completion of, education is inhibited by financial constraints or barriers.
- 1.2. Our Trust aims to:
 - Have clear and transparent processes for the use and allocation of 16 to 19 bursary funds
 - Make clear to parents/carers and students the type of support that is available and the means of applying for it
 - Make clear to parents/carers and students the attendance and behaviour conditions for receiving the funds

2. Legislation and 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 2023 to 2024 academic year.

3. Definitions

- 3.1. **‘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).
- 3.2. **‘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).
- 3.3. **‘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
- 3.4. 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. Statement of Equality

- 4.1. We have carefully considered and analysed the impact of this policy on equality and the possible implications for pupils with protected characteristics, as part of our commitments to meet the Public Sector Equality Duty (PSED) requirement to have due regard to the need to eliminate discrimination, advance equality of opportunity and foster good relations.

5. Roles and Responsibilities

5.1. Governance

5.1.1. The Trust Board has overall responsibility for approving the 16 to 19 bursary fund policy, but can delegate this to the Finance, Audit and Risk Committee.

5.1.2. The Academy Committee and Quality of Education Committee have delegated responsibility for monitoring the educational impact of the policy.

5.2. Chief Financial Officer

5.2.1. The Chief Financial Officer is responsible for quality assuring the fair application and delegation of funds.

5.3. The Headteacher

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

5.4. Staff

5.4.1. Our staff are expected to be familiar with the policy and its implementation.

5.5. Parents/carers

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

6. How we use the bursary fund

6.1. Financial support is available to eligible students from the 16 to 19 bursary fund. See section 7 below for details of our eligibility criteria.

6.2. The fund is intended to support students aged 16 to 19 in overcoming specific financial barriers to participation so they can remain in education.

6.3. There are 2 types of 16 to 19 bursaries:

- Bursaries for defined vulnerable groups; and
- Discretionary bursaries.

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

- Transport;
- Books/Equipment essential to the programme of study;
- Field trips and other course-related costs;
- The costs of attending university interviews and open days;
- Meals;
- UCAS fees.

6.5. This list is not exhaustive; however, any expenditure must be connected to the student's education. Expenditure must be pre-approved by the school or may not be reimbursed.

6.6. The bursary fund may NOT be used for any of the following:

- Gifts cards/vouchers;
- Attendance rewards;

- Goods and services benefitting the whole student body including those not qualifying for a bursary award;
- Blanket cash payments not linked to individual need.

7. Eligibility criteria for the 16 to 19 bursaries

7.1. Please note: the following eligibility criteria will be assessed in addition to the individual student's actual financial needs. No student will automatically be awarded an amount of funding without an assessment of the level of actual financial need they have.

7.2. Age

7.2.1. To be eligible for either bursary in the 2023 to 2024 academic year, students must be at least 16 years old but under 19 years old on 31 August 2023.

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

- Are continuing on a study programme or course that they began when they were aged 16 to 18-years-old, or
- Have an education, health and care (EHC) plan

7.2.3. Students aged 19 or over are not eligible for bursaries for defined vulnerable groups.

7.2.4. 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.

7.3. Eligible education provision

7.3.1. 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 1 of these groups:

- Be funded directly by the ESFA;
- 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.

7.3.2. 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.

7.3.3. Students are not eligible if:

- They are on an apprenticeship programme; or
- Are on any waged training.

7.4. Residency

- 7.4.1. Students must meet the residency criteria in the ESFA funding regulations for post-16 provision.

7.5. Asylum seekers

- 7.5.1. 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.

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

- 7.5.3. 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.

- 7.5.4. 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.

7.6. Bursaries for young people in defined vulnerable groups

- 7.6.1. Students with a financial need, who meet 1 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.

- 7.6.2. 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.

- 7.6.3. Universal Credit has now replaced Income Support, as well as other benefits above, for current and future young people aged 16 to 18. However, students aged 19 to 25 and funded from the 16 to 19 budget (19+ continuers and students with an EHC plan) may still receive the legacy benefits listed above.

- 7.6.4. 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).
- 7.6.5. 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, cases will be looked at individually and the outcome based 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.
- 7.6.6. 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.
- 7.6.7. 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.
- 7.6.8. 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.
- 7.6.9. We will provide this support for students from the bursary fund by making payments in kind where possible. It will not be provided as regular payments for living costs.

8. Discretionary bursaries

- 8.1. In addition to the criteria outlined above, students can apply for a discretionary bursary if they satisfy 1 or more of the following criteria:
- 8.2. Students could receive funding if:
- They have a gross annual household income of below £30,000;
 - or
 - They are in receipt of Free School Meals.
- 8.3. If students think they are eligible for the Discretionary Bursary, they should complete the main application form and appendix 1 as they may be eligible for a contribution towards the following specific educational purposes (receipts will be required):
- Transport;
 - Books/Equipment essential to the programme of study;
 - Field trips and other course-related costs;
 - The costs of attending university interviews and open days;
 - Meals;
 - UCAS fees.

- 8.4. This list is not exhaustive; however, any expenditure must be connected to the student's education. Expenditure must be pre-approved by the school or may not be reimbursed. The bursary fund may NOT be used for any of the following:
- Gifts cards/vouchers;
 - Attendance rewards;
 - Goods and services benefitting the whole student body including those not qualifying for a bursary award;
 - Blanket cash payments not linked to individual need.
- 8.5. Payments will subject to review by the Chief Financial Officer.
- 8.6. 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.
- 8.7. In assessing any application for a discretionary bursary, we will consider:
- Level of household income;
 - 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.
- 8.8. 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.
- 8.9. Students will be required to reapply each academic year.
- 8.10. Evidence
- 8.10.1. All applications for 16 to 19 bursaries must be supported by appropriate evidence. Proof of evidence will be required to support this application and could include:
- A copy of the UC or IS award notice, in the student's name;
 - Documents such as a tenancy agreement in the student's name, a child benefit receipt, birth certificate or utility bills;
 - Written confirmation of the student's current or previous looked-after status from the relevant local authority;
 - A copy of the UC claim from Department of Work and Pensions;
 - Evidence of Universal Credit where household income is below £30,000;
 - In receipt of Free School Meals;
 - Certified letter from the DWP;
 - P60 (additional evidence will also be required);
 - Tax Credits Award Notice;
 - Self-Employment Income evidence;
 - Other relevant certification;
 - Evidence of Universal Credit where household income is below £30,000.

- 8.10.2. More than one proof of evidence will be required by the school to support this application.

9. Application and payment process

9.1. Applications

- 9.1.1. Applications should be submitted by the first week of October each academic year to allow enough time for applications to be assessed on a fair basis. This date will be clearly stated on the application form.
- 9.1.2. However, we acknowledge that students' circumstances may change and therefore the application process will remain open for the academic year, and late applications will be subject to individual circumstances and remaining bursary funds.
- 9.1.3. 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 address this in writing to the Chief Executive Officer who will consider the appeal and respond.

9.2. Conditions for the receipt of bursary payments

- 9.2.1. Payments of the bursary are conditional on students meeting the following conditions in order to ensure its use is focused on supporting educational success:
- Attendance and punctuality is above 90% (unless there are mitigating circumstances);
 - Homework & Attitude to learning averages are 3 or above.
- 9.2.2. The Head of Sixth Form will evidence these conditions have been met as part of the payment process.
- 9.2.3. All students are required to sign a declaration confirming that they agree to these conditions. These conditions need to be met at each request for funds.

10. Change in circumstances

- 10.1. If there are changes in circumstances that may affect eligibility for a bursary, applicants and/or parents/carers must notify the school without delay.

11. Record Keeping

- 11.1. Any paperwork and documents we retain for audit purposes (for example, copies of application forms, documents as evidence and any agreements signed by students)

will be kept securely in line with our data protection policy, privacy notices and record retention schedule as per GDPR guidance.

12. Unspent Funds

- 12.1. Funding for discretionary bursary funding cannot be carried forward for more than 1 year. Unspent funding must be reported to the ESFA using the [online enquiry form](#), specifying the amount of funding and the year/s it relates to, no later than 31 March each year. The ESFA will recover all unspent funds.

13. Monitoring arrangements

- 13.1. This policy will be reviewed by the Trust Board annually.

Appendix 1 – Application Form

**Application Form: 16-19 Bursary Fund Application –
2023/2024 Please complete & return to Miss Stewart – 6th
Form Pastoral Support Thank you.**

Prior to completing this form please read through the guidance above. Proof of entitlement must be included when the form is returned to the School Office.
The application form and appropriate appendix needs to be handed to the School Office as soon as possible, after admission to the Sixth Form, in September.

Learner Details

Surname/Family Name	
First Names	
Date of Birth	
Address	
Post Code	
e-mail address	
Home Phone Number	
Student Mobile Phone Number	

Bank or Building Society Details

To receive payments, you (the Learner) must have a bank account in your own name that will accept BACS payments. If you do not have a bank account, you need to open one before completing this form.	
Name of Account Holder	
Name of Bank	
Branch	
Code	
Account Number	
Roll Number	

I confirm that the details are true and accurate. I understand that to continue to receive funding, I must maintain good levels of attendance, effort and behaviour (please see page 2 of the guidance for clarification).

Signed (Learner)		Date:	
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Parental/Carer Details

Surname/Family Name	
First Names	
Date of Birth	
Address	
Post Code	
Nat Insurance Number	
Home Phone	
Mobile Phone	
Parent/Carer email address	
Household Income (pa) (Please attach evidence to application form)	

This application for assistance from the 16-19 Bursary Fund is made at the following level.

Vulnerable Bursary Form		Discretionary Bursary Form	
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Please tick one category and fill in the relevant form

I confirm that the details on this application are true and accurate to the best of my knowledge.

Signed Parent/Carer		Date	
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Application for the Vulnerable Bursary

This form should be completed in addition to the main application form and should be submitted with appropriate evidence

Full name:

Date of birth:

Do you have frequent access to a PC or laptop at home for use in your studies? Yes / No

I wish to apply for the Vulnerable Bursary under the following criteria (please delete as appropriate):

- I am living in care
- I have just left living in care
- I am in receipt of income support
- I am disabled and receive both Employment Support Allowance and Disability Living Allowance

I attach to this form the following pieces evidence to support my application (please specify below, see page one of the guidance for examples):

I wish to apply for support towards: (please use the reverse of this sheet if additional space is needed)

<u>Specific need (i.e. transport)</u>	<u>Amount applied for</u>	<u>Total</u>

I certify that the details on this application and the evidence provided are true and accurate.

Signed: (Learner)

Signed: (Parent/Carer)

Date:

Date application received:

Outcome:

Application for the Discretionary Bursary

This should be completed in addition to the main application form and should be submitted with appropriate evidence

Full name:

Date of birth:

Do you have frequent access to a PC or laptop at home for use in your studies? Yes / No

I wish to apply for Level 2 funding under the following criteria (please delete as appropriate):

- My gross household income is below **£30,000**
- I am in receipt of Free School Meals
- My household is in receipt of other means tested benefits

I wish to apply for support towards: (please use the reverse of this sheet if additional space is needed)

<u>Specific need (i.e. transport)</u>	<u>Amount applied for</u>	<u>Total</u>

Receipts will be required:

I attach to this form the following evidence to support my application (please specify below, see page one of the guidance for examples):

I understand that, where possible, purchases will be made by the school and where purchases are made by myself, prior approval is required and ALL receipts must be supplied.

Signed: (Learner)

Signed: (Parent/Carer)

Date:

Date application received:

Outcome:

Appendix 2 – Award Letter Template

NAME
ADDRESS

DATE

RE: 16-19 Bursary Award Decision

Dear NAME,

This letter confirms the outcome of your 16-19 Bursary application.

Your application has been successful/unsuccessful with an award value up to £xxx.

Please see below the items and amounts awarded for 16-19 Bursary for academic year 2023/24.

Item	Value	Details
xxx	£xxx	xxx

By signing the application, you have already confirmed acceptance of the terms and conditions of this funding agreement.

If you have any further questions please email RMGS-office@rmet.org.

Yours sincerely

Mark McDowell
Assistant Head Teacher i/c Sixth Form