

# 16-19 Bursary Policy

## 1 Document Management Information

<b>Applicable to:</b>	All staff in Secondary Academies with a Post 16 setting and Central Support Services. All Parents, Guardians and students in a Secondary Academy Post 16 setting. The policy will also be available to applicants interested in applying for a place in a Secondary Academy Post 16 setting.
<b>Dissemination:</b>	The policy will be available to staff via the Trust's Policy Centre and website. The Policy is available to Parents and Guardians on Applicaa bursary application system and our Trust website
<b>Training:</b>	Available on Request
<b>Review frequency:</b>	This policy will be reviewed annually. The policy will be reviewed earlier if needed in light of new evidence, legislation or guidance.
<b>Policy Author:</b>	Patricia Field - Trust Data Manager
<b>Executive Policy Owner:</b>	Kyle Taylor - Chief Finance & Operations Officer
<b>Approval by:</b>	Level 1 Board of Directors
<b>Approval date:</b>	September 2024
<b>Next review date:</b>	June 2025

## Revision History

Document Version	Description of Revision	Date Approved
V1.0	Trust wide policy drafted	September 2024

## 16 - 19 Bursary Policy

### 2 Aims

The Howard Academy Trust 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

### 3 Guidance

This policy is based on advice from the Education and Skills Funding Agency (ESFA) on the [16 to 19 Bursary Fund guide 2024 to 2025 academic year - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/674446/16-to-19-bursary-fund-guide-2024-to-2025-academic-year.pdf)

### 4 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

## 5 Roles and responsibilities

### 5.1 The Trust

The Board of Directors has overall responsibility for approving this 16 to 19 bursary fund policy which may be delegated to the Chief Executive Office.

### 5.2 The Principal

The Principal of the relevant secondary school is responsible for ensuring relevant staff are familiar with this 16 to 19 bursary fund policy, and that it is being applied consistently.

### 5.3 Staff

Our staff are responsible for implementing this 16 to 19 bursary fund policy consistently, with support from the Central Trust Finance Team who are responsible for ensuring financial compliance and implementation of both the eligibility process and physical payments and authorisation of evidence process

### 5.4 Parents

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

## 5.5 Raising Awareness

Schools within the Howard Academy Trust aim to raise awareness of the bursary to ensure it reaches those students in sixth form who would benefit from receiving a bursary. The schools commit to:

- Making prospective pupils and parents aware of the bursary on open days
- Posting information about the bursary on school websites and appending posters around the sixth form area at each school within the Trust.
- Providing all sixth form students with access to the bursary policy and the online application form system Applicaa. Ensuring the Head of Sixth form/Sixth Form Team in each school are available (by appointment) to discuss with any students who have questions or need support in completing the online application form.
- The Head of Sixth Form at each school within the Trust will ensure that sixth form tutors are aware of the policy, to ensure they will promote it to their tutor groups. Additionally, they will ensure that the pastoral teams within each school are aware of the policy and online application process to allow pastoral staff to flag/ identify students in sixth form who may benefit from the bursary and be eligible to receive it.
- The Schools within the Trust will use the evidence available to them to signpost particular groups of students to the Bursary to ensure they are aware of the Bursary policy, this in particular will include students who are or have previously been entitled to Free School Meals and students who are looked after or former looked after children and students for whom the schools within the Trust have received pupil premium for.
- Utilising the Applicaa system to auto push the policy to the parents/ guardians of new sixth form students and utilising the system to make the application more accessible

## 6 How we 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 specific financial barriers to participation so they can remain in education.

There are 2 types of 16 to 19 bursaries:

- Bursaries for defined vulnerable groups; and
- Discretionary bursaries

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

- Transport
- Books
- Equipment (Including a laptop which must be returned at the end of the students' studies)
- Uniform - in line with the 6<sup>th</sup> form dress code
- Field trips and other course-related costs
- The costs of attending university interviews and open days
- Emergency meal support for individual cases of severe hardship to provide meal support on the days a student attends their study programme. There are no additional checks needed under this point.

In line with the Bursary guidance the School will retain 5% of the bursary funding within the school's budget to recoup the administration costs of delivering the policy.

## Eligibility criteria for the 16 to 19 bursaries

### 6.1 Age

A student must be aged 16 or over but under 19 on 31 August 2024 to be eligible for help from the bursary fund in the 2024 to 2025 academic year, except for the following exceptions:

- students aged 19 or over are eligible to receive a discretionary bursary if they are continuing a study programme they began aged 16 to 18 (19+ continuers) or
- have an education, health, and care (EHC) plan

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 you consider they need the support to continue their participation. Students aged 19 or over are not eligible for bursaries for vulnerable groups.

You 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 institution, you may use your 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. The [ESFA funding regulations](#) for post-16 provision provides more detail about funded 14 to 16 year olds.

Students aged under 19 enrolled on higher education qualifications are not eligible for support from the 16 to 19 Bursary Fund. The Trust/ School will use the eligibility checklist to ensure students are eligible to receive the bursary

[https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/1145246/16\\_to\\_19\\_Bursary\\_checklist.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1145246/16_to_19_Bursary_checklist.pdf)

### 6.2 Eligible education provision

All Trust schools sixth form provisions are funded by the ESFA and therefore are eligible education provisions.

### 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.

We 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, 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.

## 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 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 capped at £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 need to participate and will not automatically receive £1,200 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 per year if such would be necessary in all the circumstances for the student to remain in education. Any such additional payment will be made 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.

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.

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.

## 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:

- Gross household income needs to be below £28,000 per year or
- The student or their family is in receipt of benefits

Students who do not satisfy any of the criteria listed in this section but can demonstrate financial hardship arising from other reasons may apply for a discretionary bursary. 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 school

The requirements of their study programme

Whether the student has additional responsibilities that may mean they need extra help

The guidance provides no set limit on the amount of discretionary bursary that can be awarded to students, however the school will generally set the maximum at £2,000, unless there are exceptional circumstances arising from the individual assessment of a student's bursary application. 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 and submitted evidence.

We 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 we may request are:

- A copy of the UC claim from Department of Work and Pensions in the parent's/carer's name

- A copy of the UC award notice, in the student's name

- Documents such as a tenancy agreement in the parent's or 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

## **7 Application and payment process**

### **7.1 Applications**

Applications will only be accepted via Applica and should ideally be submitted by the end of September to allow enough time for our school to assess the overall level of demand and make discretionary awards on a fair basis.

However, we acknowledge that students' circumstances may change and therefore the online Applica application process will remain open for the whole school year.

Applicants will be notified in writing via email as to whether their application has been successful; this will be done through the Applica system, 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.

Applications can only be considered if completed in the online application system Applica with appropriate supporting evidence. We ask students, with support from parents, to ensure the form is completed fully, and evidence provided in full to ensure we can assess the application as quickly as possible to ensure a swift commencement of any bursary payments.

### **7.2 Payment process**

Payments are made using the following process:

BACS payments are made to student's bank accounts, we are not permitted to pay the funds from Bursaries into a parent or carer bank account.

Where possible the school will assess the pupil's level of support required from the bursary and look at associated evidence provided e.g. evidence of the cost of a monthly bus pass. The school will individually assess the pupil's case, to determine a set monthly payment for that individual. For students who do not need support with a set monthly eligible cost, this option will not be available as we do not make fixed payments unless the results of the individual assessment show this is required for that student.

The individual will be required to provide evidence in the form of receipts or invoices for the first two months of the Bursary, or more if deemed needed by the school or finance team.



Following this, payments are made linked to attendance, but the school reserves the right to stop or pause payments should they suspect funds are not being used for intended purposes.

Students may receive payment in kind, upon production of receipts for items agreed, where the expenditure is not a regular monthly cost.

Please note that as part of our checks to prevent fraud a member of the central finance team will need to call the student to confirm that the bank details on the application form are theirs and have not been amended by anyone else. Students who are vulnerable may ask the Sixth Form team to join them for this short conversation. We are unable to make payment until details have been confirmed.

### 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:

- Attendance at or above 93% [subject to exceptional circumstances].
- Adhering to the school's Sixth Form Code of Conduct
- Following the school's Behaviour policy

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, but we 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.

We 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.

We reserve the right to reclaim money from students where it is not spent for the reasons it was awarded and by signing the declaration, students agree to pay back any money where it has not been spent for the intended reason.

We 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.

The school may specify that students return any books and equipment purchased for them through the bursary, such as a laptop, at the end of their study programme for use by other students. This will be clearly communicated to students and their parents upon confirming eligibility for the bursary.

## 8 Change in circumstances

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

## 9 Record Keeping

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. These policies are available on request.



## Application Process Academic Year 2024-25

Eligibility will be determined via a formal application process. The Howard Academy Trust is using an online application system for bursary funding. You must ensure that all questions on the application form are answered. You will be asked to provide relevant supporting documents. There will be links in the online application system to upload these for checking. The Trust will aim to process the information within 10 school days following the deadline and will inform you in writing of the outcome.

**All eligible payments will be subject to compliance with each School's Code of Conduct, Attendance Policy, and adherence to subject work deadlines.**

All bursary payments will be managed through the Applicaa system and payments will be issued by **BACS Payment** to the **student's bank account**. All queries should be brought to the attention of the Head of Sixth Form at each individual school in the first instance.

**The information that will be collected in the online bursary application form will include:**

### Student Information:

Surname	Forename	Date of Birth	Year and Form	Address	Mobile Number
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Students will also be asked to provide Payment Information for BACS - This must be the student's own bank account.

Name on bank account
Bank Name:
Account Number:
Sort Code:
Ref:
Email address for Remittance Advice:

### Details of Parents/Carers of applicant:

Surname	Forename(s)	Single/Married/Living with partner
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### Details of other Dependents in the family home:

Name	Date of Birth	Are they in full time education/training?
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**The following questions will be asked to support your application.**

1.	Are you a young person in care?
2.	Are you a young carer?
3.	Are you a young person in receipt of income support?

4.	Are you a disabled young person in receipt of employment and support allowance who are also in receipt of disability living allowance?
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If you answered YES to question 3 or 4 you will be asked to attach evidence

Are you eligible for free school meals?
If yes you will be asked to confirm that the school meal service will be used and state, the cost per day claimed

1. Do you require support for Transport Costs?
If yes you will be asked to provide details of these requirements in the online application form system and approximate costs with evidence where possible. You must submit evidence of this section's costs. For instance, if you need support with a bus pass you should include a screenshot of the monthly cost of the bus pass/ ticket you will need.
2. Other assistance required
If yes you will be asked to specify precisely the assistance required, including cost, and detail

**Your Parent/Carer will be asked to provide financial information to support the bursary claim**

*Eligibility will be determined where the joint parental income is no more than **£28,000** per annum*

*As this is a means tested grant, proof of your financial circumstances will be required. Applications received without evidence will not be processed. Evidence may include:*

- P60
- Receipt of Benefit Notification,
- Tax Credit Award Notification
- Self Employed Income Notification.

### Income from Employment

Gross Salary/Wage	Per week/month/year
Occupation	Please state if Unemployed
Gross Salary/Wage of Spouse/Partner	Per week/month/year
Occupation	Please state if Unemployed

### Other Income

Job Seekers Allowance	Per week/month/year
Income Support	Per week/month/year
Child Benefit	Per week/month/year
Working Families Tax Credit	Per week/month/year
Maintenance Payments	Per week/month/year
Disability/Incapacity Benefit	Per week/month/year
Other Income (Please specify)	Per week/month/year

**Declaration**

You and your parent / carer (the person providing the financial information) will be asked to sign the declaration online. There will be 3 options available for a signature, draw it, type it, or upload a photo of your signature.

The declaration is to confirm that the information given in the online application form is correct to the best of your and your parent's/carer's knowledge and belief. It will be used to confirm that your parent/carer understands that all information given may be checked with the Benefits Agency or HM Revenue and Customs and that the submission of incorrect information may result in legal action.

You and your parent/carer will be asked to agree to inform the Finance Department immediately should there be any changes to the details given and understand that the information may be checked with the Benefits Agency or HM Revenue and Customs, and that the submission of incorrect information may result in legal action.

**Data Protection**

Please refer to the Howard Academy Trust's privacy policy for information on how we process your personal data. A copy of this policy is available in the Applicaa application system.