

THE BEMROSE SCHOOL



POST 16 BURSARY POLICY

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1. Overview

This policy describes how The Bemrose School will distribute the funds allocated by the government in a fair way to support pupils in undertaking Sixth Form study. The 16-19 Bursary Fund provides financial support to help pupils to participate in and benefit from a place in 16 to 19 education or training. The 16-19 Bursary Fund targets support towards the most financially disadvantaged 16 to 19-year olds - those who most need help with the costs of staying on. The Bemrose School will determine the eligibility criteria for discretionary bursaries, and the frequency of and conditions for payments for all awards. The 16-19 Bursary will only be awarded to a pupil that is eligible and facing genuine financial barriers to participating.

The Bursary is to support pupils with the cost of transport, sixth form dress code, educational books/equipment and educational trips; the school may retain a proportion of the bursary to purchase the resource directly on behalf of the pupil.

2. Eligibility Criteria: all bursaries

A pupil must be aged 16 or over but under 19 at 31 August 2023 to be eligible for help from the bursary fund in the 2023 to 2024 academic year.

Pupils 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+ pupils 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.

Pupils aged 19 or over are not eligible for bursaries for vulnerable groups.

3. Residency

Pupils must meet the residency criteria in [ESFA funding regulations](#) (1) for post-16 provision.

3.1 Accompanied asylum seeking children (under 18 with an adult relative or partner)

Accompanied asylum seeking children (those under 18 with an adult relative or partner) and those aged 18 and above are entitled to education, but not to public funds. As long as an accompanied asylum seeker has not had their application for asylum refused, in-kind pupil support such as books, equipment or a travel pass can be provided. No cash payments can be given to an applicant who is an asylum seeker unless they are an unaccompanied asylum-seeking child (UASC).

3.2 Unaccompanied asylum-seeking children

Unaccompanied asylum-seeking children do not receive cash support from the Home Office 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.

When these young people reach legal adulthood at age 18, immigration status will be considered. If the asylum claim is decided in their favour, they will receive the same support as a care leaver. As such, they continue to be eligible for a bursary as a pupil from a vulnerable group until they reach the upper age limit.

Where an asylum claim is not supported, the individual may not be able to stay legally in the UK. When asylum claims have been fully heard/the appeals process exhausted, an individual has no entitlement to public funds and bursary support will be withdrawn.

4. Types of Bursary

There are two types of Bursary available:

4.1 Bursaries of up to £1,200 for all young people in the following nominated vulnerable groups:

- Pupil is in or recently left local authority care
- Pupil gets Income Support or Universal Credit because they're financially supporting themselves or financially supporting themselves and someone who is dependent on them and living with them such as a child or partner
- Pupil gets Disability Living Allowance (DLA) in their name and either Employment and Support Allowance (ESA) or Universal Credit
- Pupil gets Personal Independence Payment (PIP) in their name and either ESA or Universal Credit

Pupils may get the full amount if they have expenses and study full-time on a course of at least 30 weeks.

They'll usually get less than the full amount, or no bursary, if one of the following apply:

- The course is shorter than 30 weeks (they will be paid on a pro-rata basis if this is the case)
- They study part time
- They have few expenses

Applicants will need to bring supporting evidence.

- For pupils who are in care or a care leaver, written confirmation from the local authority that looks after them or provides their leaving care services
- For pupils getting Income Support or Universal Credit, a copy of their Income Support or Universal Credit award notice (they must be entitled to the benefits in their own right). The evidence must confirm that they can be in further education or training. If they're getting Universal Credit their institution will also need to see either a tenancy agreement in their name, a child benefit receipt, children's birth certificates or a utility bill.
- For pupils getting Universal Credit (UC)/Employment and Support Allowance (ESA) and Disability Living Allowance and Personal Independence Payments, a copy of the UC claim that confirms which ESA group they've been placed in. They will also need to provide evidence that they're receiving Disability Living Allowance or Personal Independence Payment.

4.2 Discretionary bursaries to young people facing genuine financial difficulties which may affect their participation in education.

5. Acceptable reasons for Financial Support from The Discretionary Bursary

The level of discretionary bursary support provided will be dependent on the costs pupils can demonstrate they incur through their Sixth Form study. Examples of costs would include (but are not limited to)-

- Travel to and from school, if your journey is not walkable (more than 2 miles or there is a genuine reason why a pupil cannot walk to school e.g a disability)
- Travel to Open Days
- Personal Protective Clothing or necessary clothing required for a course.
- Books, materials and equipment needed for a particular course (such as for art or other practical subjects)
- The cost of educational visits related to courses.

6. Application

Pupils with a family income of less than £25,000 can apply for a discretionary award on the form provided. These forms require details of costs that a pupil faces and of family income. The pupil's family is defined as the combined income of those people with whom the pupil usually lives. Child tax credits and child elements from Universal Credit system are not included in this £25,000 threshold.

If the pupil is in a monitored care arrangement and there is financial need, the £25,000 threshold will not apply. Any discretionary award in this case will need to be jointly agreed by the Executive Headteacher and Head of Post 16.

To best allocate funds, pupils will need to have submitted their application forms with supporting evidence by the end of September at the start of the school year. The school recognise that family and individual circumstances can change, therefore applications can be made at any point within the school year. Awards can be made if there is still funding available.

7. Assessment and evidence of entitlement

The application form will be assessed by the Head of Post 16 and the level of payment decided. The application form requires certain proof of income and failure to provide this proof will usually result in the refusal of an award, details of each pupil's financial need should be broken down in the cost section of the form. The maximum award will be dependent on the individual circumstances of each applicant but will not exceed £550 and the total awards will not exceed the funding made available to the school in any one financial year. Should valid requests exceed the amount the school has then a scaling will be applied to awards. A checklist will be used to confirm every applicant's eligibility criteria.

8. Payment of bursaries

Payments will be made by direct bank payment to the young person following the appropriate Derby City systems or by cheque.

In some cases, 'in kind' payments may be more suitable; for example, transport passes for school buses, school trip payments, or equipment, such as scientific calculators, that the school is able to bulk buy and provide at lower prices. Pupils should return books and equipment at the end of their study programme to be used again by other pupils if these have been purchased 'in kind'. For example, if it is decided a graphical calculator or a laptop is necessary for the pupil to complete their study programme, the school may purchase this with bursary funds. However, the pupil should return the equipment to the institution once they have completed their study programme so it can be re-used by another pupil.

9. Conditions of payment

Payment is conditional on good attendance including punctuality. Good attendance means that pupil's attendance is above 95%. All absences must be properly notified and authorised by the school. Monthly attendance will be reviewed on each occasion and if attendance for that month is 95% or above or overall attendance is at the expected standard then the attendance criteria has been met.

Known absences (e.g. medical appointments, University visits etc.) should be notified to the Head of Post 16. Holidays during term time and prolonged medical absences will not be paid as the bursary is awarded to support participation in education.

Payment is also conditional of good approach to study. A good approach means that a pupil works consistently hard in class and meets all independent study expectations and deadlines.

Behaviour in lessons, around the school and the local community in school hours are also conditions of payment and if concerns about a pupil's conduct are raised then bursary payments may be declined.

Where pupils have been absent for a period of 4 continuous weeks or more (excluding holidays, or if there is evidence that the pupil intends to return) ,and where pupils have made a decision to withdraw from a study programme, bursary payments will be withdrawn. In rare instances, the school can take money back from pupils if they have not spent it for the reasons it was awarded to them. This will be done by withdrawing some money from future payments to repay this money. In these cases, the school will consider fully the impact of such an action on the individual pupil before taking a final decision to do so.

10. Decisions

An appeal about any decision would be to the Executive Headteacher and then to the relevant governing body committee.

11. Audit

All application forms including the decision made will be kept for the appropriate period and an audit trail will be maintained on the finance system. A record of bursary applications and awards (including the number, value, purpose, whether awarded or not, and a brief justification for the decision) will be maintained. The application process, how the pupil was assessed, how they made the decision to award the specific amount of bursary and the funds that they have issued to the pupil will be documented.

Hard or scanned copies of documentation will be retained for 6 years (records can be kept electronically). Examples of documentation include:

For the bursary for vulnerable groups:

- a copy of the funding claim sent to SBSS
- evidence showing that the pupil is eligible, for example, a letter from DWP or the local authority or a copy of the pupil's online Universal Credit statement
- evidence of payments received from the SBSS, for example bank statements and remittance advices
- evidence of payments made to the pupil

For the discretionary bursary:

- Evidence used to assess eligibility, such as a letter from DWP or evidence of household income, including any copies of online statements for Universal Credit.
- a copy of the pupil's individual assessment of actual financial need
- receipts for in-kind purchases made, for example, bus pass, lunch receipts or book receipts

12. Recycling bursaries for vulnerable groups funding

If unused funding for bursaries for vulnerable groups during the academic year accrues, these funds will be recycled and used to offset funding claims for other eligible pupils until 30 April 2024. For example, if a pupil leaves early after only receiving part of their bursary or the school does not pay the full amount to a pupil because they did not meet the agreed conditions. Or, for example, rather than claiming £1,200 for a newly identified pupil who meets the criteria for a bursary for vulnerable groups, the school may already have £700 that they claimed for a pupil who has now left. The school will recycle the £700 for the new pupil, claiming only £500 from the SBSS to give them the total amount of funding they need.

If the school holds enough funds to cover the costs of a bursary for vulnerable groups eligible pupil in full, the school will submit a funding claim form to the SBSS showing a zero amount.

The school will add any funding for bursaries for vulnerable groups they have claimed, but no longer need, for eligible pupils to their discretionary bursary allocation from 1 May 2024.

12.1 Administration contribution

The school will use up to 5% of the bursary allocation for administrative costs.

13. Managing discretionary bursary underspends

In the first instance unspent bursary funds will be pooled, and we will then look to use this on funding additional activities especially around HE, purchasing literature and study resources for the bursary pupil cohort.

Any money left over we then consider if there is the capacity to top slice 5% to school funds for admin but only if the pot is not spent. If there are still funds available after an administration contribution, the school will carry unspent bursary funds over to the next academic year. Any funds that are carried forward will be used to support the next cohort of discretionary bursary pupils.

14. Data Protection

For the purposes of the Data Protection Act (DPA), the Department for Education is the data controller for any personal data that is given to the school. This personal data will be processed in accordance with the DPA, only used for the purpose(s) for which it is supplied to us and only shared with third parties where it is necessary for us to do so and the law allows it.

Reference:

Residency Criteria (1) <https://www.gov.uk/government/publications/advice-funding-regulations-for-post-16-provision>

Further information on the bursary scheme can be found at

[16 to 19 Bursary Fund guide 2023 to 2024 academic year - GOV.UK \(www.gov.uk\)](https://www.gov.uk/guidance/16-to-19-bursary-fund-guide-2023-to-2024-academic-year)

Appendix 1

Information for pupils

16-19 Bursary-Information for Year 12 and 13 pupils

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

The fund is made available from the government through its funding body – Education Funding Agency (EFA) for 16-19 year olds. It is designed to help to provide assistance to pupils whose access to, or completion of, education is inhibited by financial constraints or barriers.

- **Award for Vulnerable Pupils:**

Pupils aged at least 16 and under 19 years of age on 31/08/23 who are in care, are leaving care, are in **direct** receipt of Income Support (not a parent) or are disabled and in receipt of both Employment Support Allowance and Disability Living Allowance are entitled to an award of up to £1200. If you fall into this category, please see the Head of Post 16.

- **Discretionary Award:**

If the income of the home in which you live is below £25,000 you may apply for a discretionary award. You can apply for help with books, computer access, stationery, equipment, travel, trips. If you would like to apply, ask the Head of Post 16 for an application form. You then need to fill it in and attach any required evidence and then return it to the Head of Post 16.

- **Amount of Awards:**

The amount of a discretionary award will depend on family income, individual circumstances and a pupil's choice of courses as certain options may include more costs. The amount available to any one pupil in any one year will not exceed £550, the amount available to the school in each year is limited.

- **When to Apply:**

You should make your application by the last school day in September. You may wish to apply later in the year if your home circumstances change or you have expenses that you were not expecting, funds will be allocated if you qualify if they are still available in the bursary fund.

- **How the money is paid:**

Money can **only** be paid into a bank account in your name. Or in a cheque made out in **your** name. You will need to give these details on a separate application form. If the money is for a trip or for school books etc. the money will be transferred internally in school rather than paying you directly.

- **Year 13 pupils:**

If you applied last year, you will not need to reapply this year but will need to ensure a signed and dated (hard copy or electronic) self-declaration form is provided to confirm that your household circumstances have not changed.

Conditions of Payment

Payment is conditional on good attendance, good punctuality and a good approach to study. Bursary payments can be withheld if these conditions are not met.

Application for the Post 16 Bursary 2023/24- Confidential

Part 1. Pupil details		
First names	Surname/Family Name	
Date of Birth	Age on 31 August 2023	
Home address	Home telephone number	
	Mobile telephone number	
	Email address (if you have one and use it regularly)	
Postcode:		
Have you been resident in the UK and Islands for the whole of the three year period preceding your course? Yes <input type="checkbox"/> No <input type="checkbox"/> If 'No', please give the date you moved to the UK.		
Part 2. Parents' or guardians' details		
Surname	Title and first name	
Address (if different from above)	Contact telephone numbers:	
	Parents' email address:	
Postcode:		
Part 3. Household details		
Please state who you live with and their relationship to you		
Name	Relationship to you e.g. mother, father, brother, sister, partner etc	Age if under 16

If any of the following circumstances apply to you (the pupil applying), please tick the appropriate box:

You are in receipt of Income Support or Universal Credit because you're financially supporting yourself ☐

You're in or recently left local authority care ☐

You get Personal Independence Payment (PIP) in your name and either ESA or Universal Credit ☐

You get Disability Living Allowance (DLA) in your name and either Employment and Support Allowance (ESA) or Universal Credit ☐

You have a combined household income of less than £25000 ☐

If you have a household income of less than £25,000

What is your total household income?

Part 4. Please indicate the help you require by detailing the amounts needed in the last column

	<u>Amount</u>	<u>Frequency (e.g. per week/month)</u>
Travel costs		
Sixth Form Dress code		
School meals		
Books		
Trips		
Equipment		
Other (state reason/s)		

Part 5. Evidence required to support your application (this needs to evidence the total household income value you have entered at the end of Part 3)

Receipt of Income Support by young person	An award letter which is less than three months old on the date of application
Disabled young person	A letter setting out the receipt of Employment Support Allowance and also in receipt of Disability Living Allowance

Looked After or Care Leaver	Written confirmation of your current or previously looked after status from the local authority which looks after you or provides your leaving care services
Household income under £21000	Universal Credit -The last three monthly universal credit statements of your parents /guardians Working Tax Credit / Child Tax Credit: Pages 1-4 of your parents'/ guardians' most recent Tax Credit Award Income from paid employment: a P60 for the last tax year or the last 3 months wage slips

Note: If you do not have the specified evidence, please contact the school to discuss possible alternative evidence options. You can also attach a letter outlining any special circumstances that may apply in your case.

Part 6. Declaration

I certify that the information given above is correct and understand that the institution has the right to reclaim any funds and equipment costs, if I am found to have provided incorrect information or do not complete my course.

Signature of parent/guardian or pupil if living independently:	Date:
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REMEMBER: Your application will not be assessed **unless you give your full details and include documentary evidence asked for in Part 5**

Please return this form to: Miss M McCabe, Head of Post 16, The Bemrose School, Uttoxeter New Road, Derby. DE22

If you need any information or support please contact **Miss McCabe** on **01332 366711** or email **mmccabe@bemrose.derby.sch.uk**

The 16-19 Bursary Fund is cash limited and can only be allocated whilst funding lasts.

Funding cannot be guaranteed in cases of over-demand. Failure to meet the requirements of the Sixth Form Contract can lead to loss of payments. In exceptional circumstances the awards are at the discretion of the head of the institution

The entitlement to the fund is conditional on meeting the 16-19 Bursary Fund criteria