Fred Nicholson School

16 - 19 Bursary Fund Policy

'Building for Successful Futures'

Formally adopted by the Governing Board of	Fred Nicholson School
Chair of Governors	Hilary Bradshaw
Policy Holder	Executive Headteacher
Policy Contributor	Head/ SBM / Sixth Form Lead
Last updated	Autumn 2024
To be Reviewed	Autumn 2025

Statutory Policy	Y	Published on Website	Y

This policy is based on a model policy from The Key for School Leaders, based on advice from the Education and Skills Funding Agency (ESFA) and approved for The Key by Forbes Solicitors.

<u>Any updates and amendments to government legislation or guidance from the Education HR Service automatically supersede this school policy prior to ratification by the Governing Body.</u>

This policy applies to our Post-16 provision.

CONTENTS:

---

1. Aims

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/carers and students the attendance and behaviour conditions for receiving the funds

2. Guidance

This policy is based on advice from the Education and Skills Funding Agency (ESFA) on the 16 to 19 bursary fund for the 2024 to 2025 academic year.

3. 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 of 13 weeks), which began after the age of 14 and ended after the age of 16)

4. Roles and responsibilities

4.1 The governing body

The governing body has overall responsibility for approving the 16 to 19 bursary fund policy, but can delegate this to a committee, an individual governor or the headteacher.

The governing body also has overall responsibility for monitoring the implementation of this policy.

4.2 The headteacher

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

4.3 Staff

Our staff are responsible for implementing the 16 to 19 bursary fund policy consistently. The School Business Manager, the Headteacher and nominated governor will take responsibility for the implementation and management of this.

The Senior Leadership Team will provide staff with appropriate training in relation to this policy and its implementation.

4.4 Parents/Carers

Parents should notify staff or the headteacher of any concerns or queries regarding the 16 to 19 bursary fund policy.

5. 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 where necessary to fund:

- Transport.
- Specialist equipment needed for a student to be able to access the curriculum or to develop their independence in life skills (including equipment recommended by OT or physio).
- Educational visits that support the curriculum, residential visits and other course-related costs.

6. Eligibility criteria for the 16 - 19 Bursary

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.

6.1 Age

To be eligible for either bursary in the 2024 to 2025 academic year, students must be at least 16 years old but under 19 years old on 31 August 2024.

Students aged 19 or over must either:

- Be continuing on a study programme they began aged 16 to 18, or
- Have an Education, Health and Care Plan (EHCP)

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

6.2 Eligible education provision

Students must be participating in provision that is subject to inspection by a public body that assures quality (e.g. Ofsted) and funded directly by ESFA or by ESFA via a local authority.

Students are not eligible if:

- They are on an apprenticeship programme
- Are on any waged training

Students who are studying via distance learning may need infrequent financial help. If this is the case we will discuss with them the support they may need under this policy.

6.3 Bursaries for young people in defined vulnerable groups

Students who meet one of the following 4 criteria below, in addition to the above age and residency criteria, can apply for a bursary for vulnerable groups of up to £1,200 per year.

The defined vulnerable groups are students who are:

- In care (those who are privately fostered are **not** classed as looked after)
- 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

We will look at individual cases for these students, based on needs. Students will only receive the amount they actually need to participate and not automatically receive £1,200 if they do not need the full amount.

Students eligible for bursaries under this category will be given a pro rata bursary if their study programme lasts for less than 30 weeks.

We will obtain the following **proof of eligibility** for vulnerable groups:

- For students who are in care or a care leaver, written confirmation of their current or previous looked-after status from the relevant local authority. The evidence could be a letter or an email but must be clearly from the local authority
- For students in receipt of Income Support or Universal Credit, a copy of their Income Support or Universal Credit award notice. This must clearly state that the claim is in the student's name/confirm they are entitled to the benefits in their own right. The evidence must not state any conditions that prevent them from participating in further education or training
- For students in receipt of Universal Credit (UC), a tenancy agreement in the student's name, a child benefit receipt, children's birth certificates, utility bills etc.
- For students receiving UC/Employment and Support Allowance and Disability Living Allowance and Personal Independence Payments, a copy of their UC claim from DWP (UC claimants should be able to print off details of their award from their online account). Evidence of receipt of Disability Living Allowance or Personal Independence Payment, must also be provided

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 assessing an application for a discretionary bursary, we will consider:

- Level of household income. We are unlikely to provide a bursary where the household income is over £27000.
- Distance to travel between the student's home and the institution
- The number of dependent children in the student's household
- Whether the student has additional responsibilities that may mean they need extra help

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.

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 required

To assess household income, we will ask to see:

- Proof of benefit award letters (e.g. PIP/DLA/ESA
- Tax credit award notifications
- P60 from the end of the 2022/23 tax year
- Pay slips (most recent 3)
- Universal Credit award notices (3 most recent monthly award statements)

The school reserves the right to retain up to 5% of the discretionary bursary fund for admin costs and to retain a small emergency fund to support students who face exceptional circumstances during the year that impact on their ability to participate.

We will consider additional requests where families are not in receipt of the above benefits/tax credits on a case-by-case basis.

7. Application & payment process

7.1 Applications

Applications should ideally be submitted by 1st July to allow enough time for 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 application process will remain open for the whole school year.

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

Payments are made using the following process:

In kind payments eg direct payments to NCC transport, to trip accounts or for books

Termly payments by BACS transfer to the student's bank account where in kind payments cannot be made but please note our preference is to make in kind payments.

The School Business Manager will apply to the Student Bursary Support Service (SBSS) for vulnerable bursary funding via their online portal when they have seen and verified appropriate evidence to confirm that the student is eligible and ensured the student needs financial support to participate

7.3 Conditions for the receipt of bursary payments

Payments are conditional on students meeting the following conditions in relation to their standards of attendance and behaviour:

- Attendance above 95%
- Following the sixth form code of conduct

All students are required to sign the declaration on the application form confirming that they agree to these conditions. Students who fail to meet these conditions may have their payment withheld. We will consider 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, or if there is evidence that the student intends to return).

We reserve the right to take back money from students where it is not spent for the reasons it was awarded.

We will consider the impact of such an action on the individual student before taking a final decision to do so.

7. Change in circumstances

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

If you leave the school and do not plan to return your Bursary will stop from the date you leave.

All parents/carers are required to sign a declaration on behalf of the student confirming that they agree to these conditions.

We reserve the right to take back money from students where it is not spent for the reasons it was awarded.

We will consider the impact of such an action on the individual student before taking a final decision to do so.

8. 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.

Links to Other Policies

- **Equality Impact Statement**

The Governors have reviewed this policy giving due regard to their responsibilities with respect to the equalities agenda, in line with recent legislation. They believe that the policy reflects a positive attitude and approach to all members of the school community.

Policy Approved by:

Hilary Bradshaw

Chair of Governors
Date: 2nd October 2024

Appendix A - Bursary Application Form

Student Details					
Title:		First name:		Surname	
DOB:		Age:			
Address inc postcode:					
Telephone:		Email:			
Do they have the right of abode and have been resident in the UK for the last 3 years?					Yes / No

Bursary Criteria
To qualify the student must be aged 16, 17 or 18 on 31 August 2023 and meet the EFA's residency criteria.

Vulnerable Bursary Criteria	
To qualify the student must fall into one of the below categories and produce the required evidence as stated.	
Currently looked after in care or care leaver or unaccompanied asylum seeker? *Evidence needed – letter from Local Authority if student new to school.*	Yes / No
In receipt of Personal Independence Payments (or DLA) in their own right <u>as well as</u> Universal Credit or Employment and Support Allowance in their own right? *Evidence needed - evidence of receipt of PIP (or DLA) and a copy of their UC or ESA award notice.*	Yes / No

In receipt of Income Support or Universal Credit because they are financially supporting themselves? *Evidence needed - copy of their UC or Income Support award notice/letter.*	Yes / No

Discretionary Bursary Criteria

Your household income is one of the criteria that will help us to assess your young person's application. If your TOTAL household income exceeds £30,000 per annum, your young person may not be eligible for a Discretionary Bursary payment.

Please tick below to indicate what type of evidence you have provided for the household members and ensure it is dated within the last 3 months where applicable.

If your young person or their siblings are in receipt of Free School Meals you do not need to provide further financial information in the section below – please proceed to the Free School Meals section.

Income Support/Universal Credit (Award letter)		Pension Credit (Award letter)	
Income based Jobseeker's Allowance (Award letter)		Income related Employment & Support Allowance (Award letter)	
Child Tax Credit (Full award notice for full year)		DLA or PIP (Statement/Award letter)	
Housing Benefit (Award letter)		Carer's Allowance (Statement/Award letter)	
Any other benefits – please specify:			

Please list the names of the household members and relationship to student:	
Name: Relationship:	Name: Relationship:

Free School Meals

Is the student in receipt of free school meals? Yes / No

Bank Details for Vulnerable Bursary Application Only

Please be aware that we pay all Discretionary Bursary awards 'in kind' (e.g. by purchasing any equipment required or paying for trips/services directly). This is also our preferred way of dealing with any Vulnerable Bursary payments.

NB: For any expenses that cannot be covered this way –

(1) Written agreement must be provided by the school that the cost will be covered by reimbursement before any equipment or services are purchased by parents or carer.
(2) Reimbursement will be paid into the agreed bank account on receipt of proof of expenditure – receipts, email confirming payment for services (eg home school transport).
(3) Emails/receipts must be addressed to the person named on the bank account.

Account Holder's name: ______________________________

Bank name and branch: ______________________________

Account number: | | | | | | | | |

Sort Code: | | | | | | |

Bursary Amount Applied for & Reasons

Reason for expense	Amount requested	Approved? (for school use only)
Transport costs to and from school		

Educational visits including residential trip		
OT and other specialist equipment		
Other request –		

DECLARATION
● I declare that the information on this form is true and accurate to the best of my knowledge. ● I have read and understand the 16-19 Bursary Fund information provided with this application form. I have made this Bursary application on behalf of the student named, fully aware that any false statements can lead to withdrawal/refusal of any financial support and may leave me open to prosecution. ● I understand that if I refuse to provide information that may be relevant to the claim, the application will not be accepted. ● I will ensure that the student named on this form attends school regularly and completed the course for which the bursary has been provided. (ASDAN Certificate in Personal Progress or Certificate in Personal and Social Development) ● When financial changes to our household occur, which may result in changes to the claim, I confirm I will notify the school immediately. ● I understand that money the named student is awarded under the bursary scheme has been awarded to provide them with financial support to allow them to continue to access education, and if they leave education all financial support will stop. ● I understand that the named student does not have an automatic entitlement to Bursary payments/awards and all payments are based on the information I have provided. ● Any equipment provided will remain the property of the school and should be returned in good condition at the end of the course if requested. ● I understand I have the right to appeal if I disagree with the outcome of this Bursary Application. This appeal should be made in writing to the head teacher. ● I am aware that the funding covers only this school year and that we must reapply next year if the student still requires financial support through the Bursary scheme.

Name		Relationship to student	

Signature		Date	