



Northumberland Church of England Academy Trust  
NCEA Duke's Secondary School

# 16- 19 Bursary Fund Policy

Approved by:

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## 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/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. Guidance

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

- › '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

## 4. Roles and responsibilities

### 4.1 The governing board

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

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

In our school, responsibility for approving this policy has been delegated to Russ Atkinson, Headteacher.

In our school, monitoring the implementation of this policy has been delegated to Danielle Towers, Head of Sixth Form.

### 4.2 The Headteacher

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

### 4.3 Staff

Our staff are responsible for implementing this 16 to 19 bursary fund policy consistently.

The senior leadership team (SLT) will provide staff with appropriate training in relation to this policy and its implementation.

### 4.4 Parents/carers

Parents/carers are expected to notify staff or the headteacher of any concerns or queries regarding this 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 to fund:

- Transport
- Books
- Equipment



- › Field trips and other course-related costs
- › The costs of attending university interviews and open days
- › Clothing
- › Meals

## 6. Eligibility criteria for the 16 to 19 bursaries

**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.

### 6.1 Age

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.

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 plan (EHCP)

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

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.

### 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). The provision must also fall into 1 of these groups:

- › Be funded directly by the ESFA or by the ESFA via a local authority;
- › 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

Students who are studying via distance learning are eligible for either 16 to 19 bursary, but are likely to require financial help on a more infrequent basis (e.g. travel to exams). If this is the case, we will provide support in-kind, such as a travel pass, details of which shall be decided on a case-by-case basis.

### 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 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.

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

UC has now replaced IS, 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.

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 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.

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.

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.

In assessing any application for a discretionary bursary, we will consider:

- › Level of household income- students can apply for a discretionary bursary if their household income is below £35,000 per annum. If your **TOTAL** Household income exceeds £35,000 per annum; you will not be eligible for a Discretionary Bursary payment.



- › Distance to travel between the student's home and the institution, or a location for a placement
- › The requirements of their study programme

There is no set limit for the amount of discretionary bursary that can be awarded to students. 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

All applications for 16 to 19 bursaries must be supported by appropriate evidence. Examples of acceptable evidence we may request are:

### Vulnerable bursary

- › A copy of the Universal Credit or Income Support 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- in the student's name
- › Award notice for Disability Living Allowance, Personal Independence Payment or Employment and Support Allowance- in the student's name

### Discretionary Bursary (documents required from parents/ carers)

- › P60 for tax year 2022-23
- › Self-employed earning (official tax return)
- › Income Support/Universal Credit (award letter dated within the last 3 months)
- › Other benefits/pension (award letter dated within the last 3 months)
- › Full Working Tax Credit Award Notice (award letter dated within the last 3 months)
- › Wage slips for household (dated within the last three months)

## 7. Application and payment process

### 7.1 Applications

Applications should ideally be submitted by Friday 6<sup>th</sup> October 2023 to allow enough time for our school to assess the overall level of demand and make discretionary awards on a fair basis. This date will be clearly stated on the application form.

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:

- › Make payments by BACS transfer at the end of each half term to student's bank accounts. Students must have their own bank account. Payments will NOT be made to a third party.
- › In some instances, in kind payments, such as travel passes, books, equipment, educational visits or vouchers for meals will be made

## 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- students will receive payment in line with their percentage of attendance for the payment period i.e. 95% attendance will mean 95% payment is received. Persistent lateness will also be taken into account
- › Adhering to the Duke's Sixth Form Learning Agreement signed at the beginning of each academic year

All students will receive a decision letter to confirm the 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 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, and any decision will be confirmed to the student in writing.

## 8. 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.

## 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. This information can be accessed on The Northumberland Church of England Academy Trust website <https://www.ncea.org.uk/key-information/data-protection-and-privacy/>

## 10. Unspent funds

Funding for discretionary bursary 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.



## 11. Monitoring arrangements

This policy will be reviewed by Danielle Towers at the start of each academic year. At every review, the policy will be approved by Russ Atkinson, Headteacher. Any significant changes will also be shared with the school Governing Body.