



16-19 Bursary Fund Policy

Owner:	Business & Facilities Manager
Review by:	Full Board of Governors
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Statement of intent

At S Peter's School, we are committed to closing the attainment gap between students from poorer and more affluent backgrounds, and ensuring that every young person participates in, and benefits from, a place in 16-19 education and training.

We are dedicated to:

- Distributing 16-19 bursaries via a fair and equal process that is transparent, accountable and easily understood.
- Ensuring that information regarding the application, award and administration of 16-19 bursaries is publicly available via the school website and sixth form administrator.
- Widening access to, and participation in, sixth form education.
- Monitoring and reviewing our policies to ensure effectiveness.
- Setting high targets and objectives to develop a culture of continuous improvement.
- Ensuring adequate resources are available to implement policies, as much as is reasonably practicable.
- Sharing and acquiring best practice through partnerships with neighbouring schools.

1. Legal framework

- 1.1. This policy has due regard to all relevant legislation and statutory guidance including, but not limited to, the following:
 - ESFA (2019) '16 to 19 Bursary Fund guide: 2019 to 2020 academic year'
- 1.2. This policy will be implemented in conjunction with the school's Complaints Procedures Policy.

2. The school's responsibilities

- 2.1. The school is responsible for setting eligibility criteria for students at the school.
- 2.2. The school will set conditions for receiving the bursary, such as regular attendance.
- 2.3. Arrangements for applying for bursaries will be straightforward and confidential.
- 2.4. The needs of each student who applies for the bursary will be assessed by the school and evidence will be obtained to support each application.
- 2.5. The school will claim vulnerable bursaries from the Student Bursary Support Service (SBSS) for each eligible student.
- 2.6. All bursaries will be paid to students in cash or in-kind payments.
- 2.7. Records will be kept by the school of all assessments and payments.

3. Raising awareness and take-up of the 16-19 bursary fund

- 3.1. To raise awareness of the bursary, the school employs different marketing activities, including the following:
 - Posting information about the bursary on the school website and in the prospectus, as well as on posters around the school
 - Distributing information at open evenings for Year 11 pupils from local schools
 - Providing students who attend a pre-enrolment interview with a brochure which includes information about the bursary, and directs them to the school's website
 - Providing further information, such as the application form and details of the bursary, following enrolment for all new entrants to the school in an enrolment pack, as well as a text message and email about the bursary during the Autumn term of the academic year
 - Working with local support services to target potential students who are homeless and providing them with the necessary information
 - Providing tutors with information to inform discussions between tutors and students
 - Working with social workers, who help the most disadvantaged, to identify those who may be eligible for vulnerable groups
 - Sending text messages throughout the year to inform students of the financial support available – in the Summer term, text messages are sent to inform

students that the application form can be downloaded and completed to check eligibility

- 3.2. To identify students who may be eligible for vulnerable groups, the school works with the LA, LAC education services and care leaver services to help and encourage students to apply for a bursary.
- 3.3. In addition to 3.2, the school works with the LA to establish local data sharing agreements to share information about which students may be eligible and who should be supported to make an application.
- 3.4. groups by:
 - Including information on the bursary within bulletins to social workers, published three times a year.
 - Appointing an inclusion manager who develops links with local agencies working with vulnerable people, e.g. social services, to identify eligible students before enrolment.
 - Developing networks with foster parents, schools, asylum support teams, youth offending services and health services. The school works with local stakeholders to identify eligible students for vulnerable
- 3.5. The school uses Government data to establish whether students were in receipt of pupil premium in Year 11 and Census data demonstrating SEND support, which may indicate whether they are eligible for a discretionary bursary.
- 3.6. The school ensures that, in any marketing materials and the application form, procedures for how the school maintains confidentiality are outlined to encourage more students to apply for the bursary.

4. Bursary fund statement

- 4.1. A bursary fund statement is published in January –
- 4.2. The bursary fund statement outlines the following:
 - How the school will use its funding
 - The eligibility criteria for the bursary
 - The type of support offered through the bursary, e.g. with transport, books and equipment
 - Whether the bursary fund contributes to other costs, e.g. attending university open days and interviews
 - A statement explaining that the support available to students is from the bursary fund

5. Eligibility

- 5.1. Students who are aged 16 or over and under 19 years old on 31 August before the academic year in question will qualify for bursaries for that academic year.

- 5.2. Where a student turns 19 during their programme of study, they will continue to receive the bursary up until the end of the academic year in which they turn 19, or until the end of the programme of study, whichever is sooner.
- 5.3. Students aged 19 and over who have an EHC plan due to their high needs and who attend a Special Post-16 School (SPI), are also eligible to receive a bursary from the 16-19 Bursary Fund.
- 5.4. Students aged 19 or over are not eligible for bursaries for vulnerable groups.
- 5.5. The school will only pay bursaries to students aged 16 or over, unless in exceptional circumstances, e.g. where a student is following an accelerated study programme. The school will use its discretion to decide whether a student under the age of 16 is eligible – this is explained further in section 7.
- 5.6. Students on apprenticeship programmes, or any waged training, are considered to be employed rather than in education – as such, they are not eligible for the bursary.
- 5.7. Non-employed students aged 16-19 who are participating in a Prince's Trust Team Programme are eligible to receive the bursary in the same way as any other student.
- 5.8. Students can apply more than once if their circumstances change. In this case, they will be reassessed, including a one-to-one interview to determine if there are any exceptional circumstances to consider.
- 5.9. Most students who receive a bursary will get a tailored award from the discretionary bursary. Students in need of more support can apply for a vulnerable bursary.

6. Young offenders

- 6.1. Young offenders can apply for a bursary if they:
 - Are serving a non-custodial sentence.
 - Have been released early from a custodial sentence, except on temporary license.
 - Have been remanded to a non-secure school.
- 6.2. Young offenders cannot apply for a bursary if they:
 - Are serving a custodial sentence.
 - Have been released from a custodial sentence on temporary license.
 - Have been remanded to a secure school.
- 6.3. As with all bursaries, the school will provide in-kind support to young offenders rather than cash payments wherever possible.

7. Discretionary bursaries

- 7.1. The school will ensure that discretionary funding is allocated to the students who are most in need of financial support.

- 7.2. The school's eligibility criteria for receiving a discretionary bursary includes:
- Students who are completing a high cost course (over £2,000) in which specialist equipment and clothes are required.
 - Students living in a low-income household (clarified in 7.3).
 - Students who are from a single parent family or have one or more dependent siblings in their family.
 - Students who have additional responsibilities, such as being a young carer or parent.
 - Students who travel greater than eight miles to the school.
- 7.3. Discretionary bursaries may be awarded for students in low-income households. The amount awarded will be dependent on the amount of income – this is allocated on different levels, as follows:
- **L1 discretionary bursary:** total income is equal to, or less than, £16,190
 - **L2 discretionary bursary:** total income is more than £16,190, but less than £20,817
 - **L3 discretionary bursary:** total income is more than £20,817, but less than £25,521
- 7.4. Students who apply will be assessed individually. This assessment will be documented and evidence to support the claims will be obtained and retained for auditing purposes.
- 7.5. The assessment will be based on a student's financial needs and the school will consider any unearned income, such as shares/investments, savings and rental income.
- 7.6. The school will not make blanket or flat rate payments to all students or students in the income bands outlined in 7.4 without considering the actual needs of each student.
- 7.7. The school will use in-kind payments over cash payments wherever possible.
- 7.8. The school will manage the discretionary bursary to keep payments within budget.

8. Vulnerable bursaries

- 8.1. The school's eligibility criteria for receiving a vulnerable bursary includes students who are:
- In care.
 - Care leavers.
 - Receiving Income Support or Universal Credit because they are financially supporting themselves and/or someone who is dependent on them and living with them, such as a child or a partner.

- Receiving Disability Living Allowance or Personal Independence Payments in their own right, as well as Employment and Support Allowance (ESA) or Universal Credit in their own right.
- 8.2. Students who claim ESA or Universal Credit in their own right, are able to do so whilst living in the parental home – there is no requirement to be living independently.
 - 8.3. The school will remind parents (via the application form) that they will not be able to continue to claim Child Benefit if the student successfully applies for ESA.
 - 8.4. Students who are in one or more of these categories can apply for a vulnerable bursary of up to £1,200.
 - 8.5. Where a vulnerable student is on a course lasting 30 weeks or more and is participating full-time, they will be eligible to receive £1,200.
 - 8.6. The school may pay a student in a vulnerable group more than £1,200 if it believes the student needs extra help to remain in education. Where a vulnerable student is on a part-time course, the school can make a reduction based on an hourly or daily rate.
 - 8.7. The school will only pay students the amount they need to access education, based on individual assessment. Students will not automatically receive £1,200 if they do not need the full amount.
 - 8.8. Proof will be needed to evidence that a student is eligible for the bursary, for example:
 - **In care/care leaver:** written confirmation, such as a letter or an email, of current or previous LAC status from the relevant LA (the LA that looks after them or providers their leaving care services)
 - **In receipt of Income Support:** a copy of the Income Support award notice, which must evidence that the student is entitled to the benefit in their own right, and confirm that the student can be in FE or training.
 - **In receipt of Universal Credit:** copies of the Universal Credit Award notice from the last three months, which must evidence that the student is entitled to the benefit in their own right, as well as additional documentation to confirm their independent status, e.g. a tenancy agreement in the student's name, a child benefit receipt, children's birth certificate, or utility bills.
 - **In receipt of Universal Credit/ESA and Disability Living Allowance and Personal Independence Payments:** a copy of the Universal Credit or ESA award from the Department for Work and Pensions (DWP), as well as evidence of receipt of Disability Living Allowance or Personal Independence Payment.
 - 8.9. The school will only submit a funding claim to the SBSS once sufficient evidence has been provided and the school has confirmed that the student needs financial support to participate.
 - 8.10. The school is responsible for assessing whether students are eligible to receive a vulnerable bursary.

8.11. The school may decide that, although a young person may be eligible for a bursary as they fall within one or more of the vulnerable groups, the bursary is not required as they do not have any financial need and do not need further support. If financial needs are already met and there are no other costs or they do not require the maximum award, the school may decide not to allocate a bursary to the student, for example:

- A student attends specialist residential provision that covers their education costs in full.
- A student undertakes a distance learning programme and there are no financial barriers to participation, e.g. no travel or food costs.
- A student is in LA care and education costs are covered in full by the LA.
- A student is financially supported by their partner.

8.12. If a student or the student's parents still wants to claim a bursary for vulnerable groups, they must inform the school. The school will then consider the particular circumstances in each case and assess whether:

- No bursary should be awarded, as the student has no financial needs; or
- A reduced bursary should be awarded, as the level of financial help needed is limited.

8.13. **[New]** The school will ensure its bursary application form is clear about the possibility of no or a limited award.

9. Paying bursary funding to eligible students

9.1. Some payments may be paid in-kind rather than in cash – this may include, for example, travel passes, vouchers/credits for meals, required books or equipment.

9.2. Where in-kind payments are given to students within vulnerable groups, the school will explain the value of these payments to the student and how these have been deducted from the total £1,200.

9.3. Where payments are made to students, rather than in-kind, the funding will be paid by BACs transfer to the student's own bank account.

9.4. Payments will not be paid into another person's bank account unless exceptional circumstances mean that a student is unable to administer their own account. If a student cannot manage their own funds, the school will consider who can manage the bursary on the student's behalf.

9.5. The school has the right to determine how often payments are made – when doing so, the following will be considered:

- The reason the bursary was awarded
- The student's circumstances
- Local arrangements

- 9.6. The school has the right to insist that students only spend bursary payments on the support that has been identified as necessary to help them access education, e.g. to pay for travel costs.
- 9.7. If students or their parents have any queries about payments, they should contact the Senior Business Officer on finance@speters.org.uk or 01902 558600 option 5

10. Conditions for receiving bursary funding

- 10.1. Receipt of a vulnerable or discretionary bursary will be conditional on the student meeting the agreed standards set by the school.
- 10.2. The conditions of payment will be clear and accessible to students, as well as being thoroughly explained as part of the induction process.
- 10.3. Evidence that the student has seen and agreed to the conditions will be kept for audit, such as an agreement signed by the student, in accordance with section 12.3.
- 10.4. Students in receipt of bursaries must have 85 percent attendance at timetabled lessons, unless the absence is authorised.
- 10.5. Students that are absent due to sickness will be expected to present a note from a qualified medical practitioner if their absence is longer than three days.
- 10.6. Vacation breaks outside timetabled school holiday times are not permitted.
- 10.7. Students in receipt of bursaries will be expected to abide by the Behavioural Policy of the school.
- 10.8. Where there are concerns regarding a student's attendance or behaviour, the school will discuss the issue with the student and consider individual exceptional circumstances before withholding any payments.
- 10.9. The school will ensure that all parents and students are aware of the possible impact that attendance may have on payments, outlined in the application form.
- 10.10. The school will stop payments where a student has been absent for a period of four continuous weeks or more, excluding holidays or if there is evidence that the student intends to return.
- 10.11. The school will also stop payments where a student withdraws themselves from a study programme.
- 10.12. Money may be taken back from students if it has not been spent for the reasons it was awarded to them. Before doing so, the school will always consider the impact of this on the student.
- 10.13. The school may specify that students return any books and equipment that were purchased for them by the school, 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.

11. Recycling bursaries

- 11.1. The school can recycle unused funding for bursaries for vulnerable groups, e.g. if a student leaves early after only receiving part of their bursary (until 30 April 2020).
- 11.2. Where the school has accrued funds as specified in 11.1, it will use these funds for another student, rather than claiming for the full £1,200, e.g. if a student left and £700 was unspent, the school will only claim £500 towards another eligible student.
- 11.3. If the school has enough funds to cover the costs of a full bursary (£1,200), it will submit a funding claim showing a value of zero to the SBSS and use the amount to fund the new student.
- 11.4. If the school decides that a student is in one or more of the defined vulnerable groups, but does not have any actual financial need, it will submit a funding claim showing a zero amount.
- 11.5. The school can add any funding for bursaries for vulnerable groups it has claimed, but no longer needs, for eligible students for discretionary bursaries (from 1 May 2020). Funds will be allocated in this way on a case-by-case basis after assessing students' needs.
- 11.6. The school can also carry forward any unspent funds to the next academic year – any carried funds will only be used to support students.
- 11.7. If the school has no other students who are eligible for a bursary for vulnerable groups and funds have been claimed in error, we will contact the ESFA and arrange to return the funds.

12. Student declarations

- 12.1. Students and/or their parent will sign a declaration when they apply for either a vulnerable or discretionary bursary, confirming that any evidence given in support of the application is correct.
- 12.2. By signing the declaration, the student and their parent are agreeing to all the conditions and eligibility criteria.
- 12.3. The school will retain copies of the declaration and supporting documentation for six years – this includes:

For vulnerable groups:

- A copy of the funding claim sent to SBSS.
- Evidence showing that the student is eligible, as outlined in section 8.8.
- Evidence of payments received from the SBSS, e.g. bank statements.
- **[New]** A copy of the student's individual assessment of actual financial need.
- Evidence of payments made to the students.

For discretionary bursaries:

- Evidence used to assess eligibility, as outlined in section 7.2.

- A copy of the student's individual assessment of actual financial need.
- Receipts for purchases made, e.g. bus pass, lunch receipts or book receipts.

13. Managing applications

- 13.1. The school uses its own application form for the bursary fund.
- 13.2. The school understands that needs may arise throughout the academic year. As such, the school does not implement a cut-off date for applications, but it is advised that all applications are submitted by 30th September, wherever possible.
- 13.3. The date for applications to be submitted will be outlined in the bursary fund statement, the bursary application form and any marketing materials.
- 13.4. Application forms and marketing materials will outline that students who meet the criteria for bursaries for vulnerable groups are not automatically entitled to receive them, e.g. if they do not have any financial needs or these needs are covered by alternative means.

14. Quality assurance

- 14.1. The school uses an eligibility checklist to confirm which documents have been provided for each student (as outlined in section 12) – these relate to the following:
- The application process
 - The decision to award the specified amount of bursary
 - The funds that have been issued to the student
- 14.2. The school maintains written records of the following:
- The number of applications received
 - The value of all bursaries awarded
 - The purpose of all bursaries awarded
 - Which applications qualified for the bursary and which did not
 - Brief descriptions of the school's justification for any decision to award a bursary or not
- 14.3. The school retains copies of any documents the student has signed to give formal agreement to their conditions for payment, as well as any others mentioned in this section, for six years.

15. Fraud

- 15.1. The school has the right to investigate any suspected instances of fraud relating to bursary fund applications.
- 15.2. If evidence comes to light that supplied information is misleading or fraudulent, the school will stop any further payments and will attempt to recover any payments already provided to the student.

15.3. Where significant fraud is identified, the school will report this to the ESFA – this includes the following:

- The amount of money is in excess of £1,200
- The particulars of the fraud are novel, unusual, systematic or complex
- There is likely to be great public interest due to the nature of the fraud of the people involved

15.4. The matter may also be referred to the police, with the possibility of the student and/or their parent facing prosecution.

16. Conditions for using the bursary

16.1. The bursary fund will not be used by the school for any reasons which would give them a competitive advantage over other schools, such as:

- Enrolment or administration fees imposed by the school.
- Fees for access to facilities in the school.
- Block subsidy of the canteen.
- Block subsidy of transport.
- Block provision of equipment, material or books.
- Make bonus payments to reward attendance or achievement.

16.2. Block payments to students for attendance, irrespective of their actual financial need, will not be paid.

16.3. The bursary fund will only be used for supporting students who have a genuine financial difficulty which might prevent them from continuing in education, rather than acting as an incentive for attendance.

17. Complaints and appeals

17.1. All complaints and appeals must be made in writing in accordance with the Complaints Procedures Policy.

17.2. If the complaint or appeal concerns operational processes or customer service for a vulnerable bursary funding claim, the SBSS will deal with the case. If the case is not resolved following this, it will be passed to ESFA.

17.3. The school will act as a first point of contact for students who have complaints and will support students as much as possible throughout the complaints procedure.

17.4. Complaints made regarding the school and the school's provision of support will be dealt with in accordance with the procedure set out in the Complaints Procedures Policy.

18. Monitoring and review

18.1. This policy will be reviewed annually by the Principal. The next scheduled review date is July 2021.

18.2. The school will ensure that this policy is implemented correctly and appropriately at all times.

18.3. This Policy was reviewed April-July 2020 by the Senior Business Officer, Business & Facilities Manager, SENDCO and Sixth Form

Ratified by Board of Governors7 October 2020.....

Governor Signed.....

Governor Printed.....

Date