

Unity Schools Partnership

16-19 Bursary Fund Policy

Introduction

1. The Education and Skills Funding Agency (ESFA) makes money available to each school to fund discretionary and vulnerable bursaries for Sixth Form Students. A student must be aged 16 or over but under 19 at 31 August. Students aged 19 are only eligible if they are continuing on a study programme that they began when aged 16-18, or have an EHCP.
2. The aim of the scheme is to support disadvantaged students with the costs of staying in education after the age of 16, (e.g., textbooks, equipment for practical subjects, educational trips, travel costs to school, university interviews and open days). UnitySP schools receive the fund allocation at the start of the academic year and has set its own eligibility criteria.
3. The bursary fund is not intended to support extra-curricular activities where these are not essential to the students' study programme, support general household incomes or provide learning support, e.g., counselling or mentoring.
4. The ESFA administers and pays individual direct bursaries of £1200 to "vulnerable" students defined as those who are in care, have previously been in care, or if the student themselves is in receipt of income support/universal credit/disability living allowance/personal independence payments.
5. This policy relates to discretionary bursaries only and has been written regarding the current guidance published by the ESFA.
6. A student awarded a discretionary bursary in Y12 will be required to submit a new application form at the start of Y13, together with the required evidence, so that the school can confirm they remain eligible each year.

Discretionary Bursary Levels

7. The Trust has set three levels of bursary support depending on the criteria outlined below; Level 1 recipients will receive the highest sum of support payments and Level 3 the lowest.
8. In determining the eligibility for each level, the school will consider the total household income, travel distance from home to school by public transport, the home local authority's transport policy for students aged 16 to 19 and the number of dependent children in the household.

Level 1

9. The total household income for a Level 1 Discretionary Bursary will not be more than £16,500. If this is the case, parents should be in receipt of one of the benefits or credits shown in the table below:

Universal Credit	Employment Support Allowance (ESA)
Job Seekers Allowance (JSA)	Housing or Council Tax Benefit
Income Support	Working Tax Credit
Pension Guarantee Credit	NHS Tax Credit Exemption Card

Level 2

10. The total household income for a Level 2 Discretionary Bursary will be between £16,500 and £20,000. If this is the case, parents should be in receipt of one of the benefits or credits shown in the table above.

Level 3

11. The total household income for a Level 3 Discretionary Bursary will be between £20,001 and £25,000.

Supporting Evidence

12. Students must attach supporting evidence to their application form. This should be in the form of parental bank statements, payslips, and/or documented evidence of any benefit payments as shown in the table above. See appendix 2 for application form.
13. Students must include on their application form details of the type and likely cost of expenditure they would claim from the bursary fund if their application were successful (see paragraph 2 above).

Vulnerable Bursaries

14. A Bursary For students aged 16-18 on 31/08/2021 who are in one of the following defined groups, a £1200.00 bursary may be available
 - in care, a care leaver
 - receiving DLA or PIP in their own right as well as ESA or Universal Credit in their own right
 - receiving Income Support or Universal Credit in their own right.

Please note students aged 19 or over on 31/08/2021 are not eligible for bursaries for vulnerable groups

Application Process and Payments

15. The Head of Sixth Form introduces the bursary to Sixth Formers in an assembly early in September and invites applications. Students who wish to apply gather the relevant supporting evidence and return their application form to the Sixth Form Administrator. Students should be given approximately two weeks to complete their applications.
16. All applications are assessed initially by the Head of Sixth Form, who may request further evidence if necessary.
17. The Head of Sixth Form and designated Bursary Governor meet to review each application and approve as appropriate. Both the Head of Sixth Form and designated Bursary Governor sign each approved application. The Head of Sixth Form must complete and retain the ESFA checklist for each applicant as part of the assessment process.
18. The Head of Sixth Form and designated Bursary Governor set the sums of money to be awarded to each level of bursary, depending on the number of approved applications and the total fund available.

19. The Head of Sixth Form will inform the successful applicants of the sum awarded to them for the year and the school's finance office of the amount allocated to each student together with a timescale for the payments, if appropriate.
20. Students should submit receipts to the Sixth Form Administrator who will arrange for Head of Sixth Form approval and forwarding to the finance office for reimbursement. Alternatively, students may submit a request for an item, e.g. a travel pass and, once approved, the finance office will arrange for this item to be purchased and the cost deducted from the student's fund allocation. The finance office will process claims up to the total allocated amount for the academic year authorised by the Head of Sixth Form.
21. Payments will be made direct to each student's bank account by BACS payment within four weeks of submission of receipts to the finance office.
22. Should a student's family financial circumstances change during the course of the year (e.g., parental unemployment), they may submit a late application to the bursary fund. The same assessment, approval and payment processes in paragraphs 15-20 above are followed.
23. A reserve sum will be retained within the central bursary fund during the course of the year to allow for late applications. During the week after the May Half Term week, if this reserve has not been needed during the year, it is divided in the same ratio as the payments for the three bursary levels among the bursary recipients as an "additional allowance" towards the end of the summer term.
24. Although the ESFA guidance allows schools to keep up to 5% of their total annual bursary allocation for administration costs, the Trust has agreed that Unity Schools will not do so. The entire annual bursary allocation will be disbursed to Sixth Formers each year.

Student Declaration

25. As part of their application, students must sign a declaration stating, *"I understand and agree that as a recipient of a 16-19 bursary, I will be responsible for maintaining high standards of attendance at school and full commitment to my 6th Form studies."*

Appeals Process

26. If any student or their parent/guardian/carer(s) are not satisfied with the outcome of their application, they should write to the Headteacher outlining their reasons why. The Headteacher will convene a 16-19 Bursary Appeals Panel, consisting of:
 - Headteacher
 - A member of the Governing Body

The Panel will consider and respond to appeals within two weeks of receipt. If the appeal is upheld or partly upheld it will be referred to the 16-19 Bursary Application Panel with recommendations. If the appeal is not upheld the appealing party will be signposted to the School's Complaints Procedure.

Annual Report

27. The governor with delegated responsibility for the Sixth Form Bursary Fund will make an annual report to the Governing Board regarding the numbers of students eligible for a discretionary bursary and the sums disbursed. This report will be made available upon request to the Trust Board and statutory Auditors.

Review

28. This policy will be reviewed annually by the Trust Board.
29. Please see appendix 2 for check list of school's requirements.

Appendix 1

County Upper School
APPLICATION FOR 6TH FORM BURSARY FUND
CONFIDENTIAL

Parent/Guardian Details

PARENT/GUARDIAN SURNAME	FIRST NAME IN FULL	TITLE	DELETE AS APPLICABLE
1.			Mother/Father/Guardian
2.			Mother/Father/Guardian
FULL ADDRESS:			
			POSTCODE:
HOME/MOBILE NO:		EMAIL:	

Student's Details, including bank account details for payments.

SURNAME	FIRST NAME	DATE OF BIRTH	REGISTRATION GROUP
BANK ACCOUNT NAME	BANK	SORT CODE	ACCOUNT NUMBER

In order to qualify for any bursary, according to government guidelines the following proof will be needed to show a taxable primary household income below £16,500.

Any one or more of the following:

- P60
- INCOME SUPPORT STATEMENT
- FREE SCHOOL MEALS
- GUARANTEED ELEMENT OF STATE PENSION CREDIT STATEMENT
- CHILD TAX BENEFITS STATEMENT (PROVIDED YOU ARE NOT ENTITLED TO WORKING TAX CREDIT)
- UNIVERSAL CREDIT
- SUPPORT UNDER PART 6 OF THE IMMIGRATION AND ASYLUM ACT 1999

Please confirm which level of funding you are applying for:

Level 1 Level 2 Level 3

These will be returned following verification.

Declaration

I certify that the information given is to the best of my knowledge and belief, correct. I undertake to notify the school of any change in circumstances. I understand that the bursary is at the discretion of the school and can be withdrawn if criteria are not met.

I understand and agree that as a recipient of a 16-19 bursary, I will be responsible for maintaining high standards of attendance (minimum of x% [completed by school]) at school and full commitment to my 6th Form studies."

Signed..... Date.....

Please hand completed forms to [enter name of Student Services Officer or Similar]

Documents Seen:	Documents returned:	Parent/Guardian Notified:
Benefit with effect from:	Amount:	Reassessment date:

Appendix 2

16 to 19 Bursary Fund: Summary

This is a list of the most important things that the school should and shouldn't do when administering the 16 to 19 Bursary Fund.

Schools should:

- Publish this policy on their website setting out how they will use their bursary fund and what eligibility criteria they use.
- Consider the relevant local authority's transport statement when setting their bursary fund policy.
- Ensure application forms, bursary policies and any supporting information are clear that the bursary fund is intended to help students with their actual costs of participating.
- Base all decisions about which students receive help from the bursary and how much bursary they receive on each student's individual circumstances and their actual financial need. These will vary from student to student. Schools must carry out a financial assessment for each student to establish their household income, whether there is an actual financial need and what kinds of costs the student has. Please seek support from your Hub Finance Manager if necessary.
- Fully verify each student's eligibility and need for a bursary for vulnerable groups before submitting any funding claim to the Student Bursary Support Service.
- Consider whether they can provide support to students in-kind – by buying a bus pass or books, providing a credit or voucher for a meal, for example.
- Retain evidence to show how they have awarded the amount of bursary they have to each student.
- Ensure students are eligible for the bursary fund each year – their circumstances and needs can change.
- Retain copies of any documents the student has signed to give formal agreement to their bursary fund conditions, including the impact on payments if they don't attend and the school's rules about returning equipment paid for from the bursary funds.
- Consider having more than one person who can process bursaries, with segregation of duties or a contingency plan if that person was absent