



ALLERTON GRANGE SCHOOL

16-19 BURSARY FUND POLICY

Designated Lead: Finance & Facilities Director

Reviewed by Governors: November 2019

Review cycle: 1 year

Next review: November 2020

16 to 19 Bursary Fund Policy

The 16 to 19 Bursary Fund is money the government has given to local authorities, schools, colleges and other education and training providers (institutions) to give to disadvantaged students. Its purpose is to provide financial support to help students overcome specific barriers to participation, so they can remain in education.

The School receives 16-19 Bursary Fund allocations for discretionary bursaries only. The funding for vulnerable student bursaries is held centrally by the Student Support Service and the School has to draw down this funding on demand throughout the academic year.

Only those students in one of the defined vulnerable groups, or those experiencing the greatest financial disadvantages and/or course-related costs are supported using the 16-19 Bursary Fund.

The School retains a small emergency fund for exceptional circumstances.

The 16-19 Bursary Fund has two elements:

- A bursary of up to £1,200 a year for young people in the following defined vulnerable groups: in care, care leavers, getting Income Support (IS) or Universal Credit (UC) in their own right, and young people getting Employment and Support Allowance (ESA) or UC and Disability Living (DL) or Personal Independence Payments in their own right.
- Discretionary awards made by the School to young people in ways that best fit the needs and circumstances of our students. Bursary awards are targeted towards those young people who face the greatest financial barriers to participation such as the costs of transport, meals, books and equipment.

The young person does not have to live independently of their parents, they can claim ESA or UC in their own right.

For the purposes of the 16 to 19 Bursary Fund, the definitions are:

“children in care” means:

- 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). Section 22 of the Children Act 1989 defines the term ‘looked after child’

“care leavers” means:

- either young people aged 16 and 17 who were 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 who is 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.

In legal terms these children are called relevant children or former relevant children.

The School is free to determine the assessment criteria for eligibility for discretionary bursaries and the frequency of and conditions for payments for all awards, subject to the requirements of the Equality Act 2010

ELIGIBILITY

To be eligible to receive a 16-19 Bursary in the 2019/20 academic year, the student must be aged 16 or over and under 19 on 31 August 2019. Where a student turns 19 during their programme of study, they can continue to be supported to the end of the academic year in which they turn 19, or to the end of the programme of study, whichever is sooner. In general, bursaries are paid only to students who are aged 16 or over on 31 August before the academic year in question.

The School can generally only pay bursaries to students aged 16 or older. However, in exceptional circumstances the School may pay bursaries to younger students, for example, where a student is following an accelerated programme they may receive a bursary. This does not apply to 14 to 16 year olds attending college as part of their Key Stage 4 programme.

Students should satisfy the residency criteria in the EFA funding regulations for post-16 provision 2019 to 2020. This document sets out the evidence that is required to confirm eligibility.

Students should be participating in provision that is subject to inspection by a public body that assures quality (e.g. Ofsted). That provision must also be either:

- funded by the EFA either directly or via a local authority, or
- funded or co-financed by the European Social Fund, or
- otherwise publicly funded and lead to a qualification (up to level 3) that is accredited by Ofqual or is pursuant to Section 96 of the Learning and Skills Act 2000, or
- a 16 to 19 traineeship programme

Where it is known that a student was eligible for Free Schools Meals in the previous year (for instance, where they are continuing into the sixth form from their current school), this will be taken into consideration rather than reassessing for eligibility.

Passing the eligibility threshold does not guarantee funding to any student and all relevant factors will be considered, including individual circumstances, funding available, etc before determining the appropriate financial support.

Awards will be made on a pro-rata basis for courses lasting less than 30 weeks and receipt of a bursary is conditional on the student meeting agreed standards set by the school, relating to attendance and/or standards of behaviour.

The School will determine which students are eligible to receive a bursary. The number and size of discretionary bursary awards will be managed to keep within the budget, targeting bursaries towards those facing the most significant financial barriers to participation. The School will assess the student's actual need for financial assistance before determining whether to award a bursary. Consideration

will be given to the student's household income as evidenced by receipt of benefit and/or P60, Tax Credit Award Notice or evidence of self-employment/other income.

There are three levels of award for 2019/20:

- those students that are in one of the defined vulnerable groups listed above
- those students that qualify for Free School Meals will be entitled to a discretionary bursary award of up to £600
- those students whose household income is between £16,001 and £25,000 will be entitled to a discretionary bursary award of up to £350

Those students that are in one of the defined vulnerable groups will receive a weekly bursary of £40, although this amount may reduce depending on their attendance. The circumstances of any absences will be considered in order to determine the students' actual weekly allocation.

In order to receive the full allocation for the discretionary awards, students will need to meet the 95%+ attendance target. Students whose attendance falls below this target will see their allocation reduced by 25%. Students whose attendance falls below 90% will no longer receive funding until their attendance figure rises above 90%, unless there are exceptional circumstances.

Further funding may be made available to all eligible students to ensure that the School's full allocation is utilised by those students needing financial support. Funding will be made available until the allocation from the EFA has been spent.

All students will be required to complete a 16-19 Bursary Fund Application Form and a Financial Assessment Form (Form A or B) and provide the necessary evidence detailed in the Financial Assessment Form.

REGULAR INCENTIVE AND BONUS PAYMENTS

The Hardship element of the fund will not be used to make regular incentive or bonus payments to students (other than "vulnerable" students as above) for the following reasons:

- The fund is to meet the needs of students who face financial hardship in attending learning. It should not be an EMA replacement.
- Commitment to a regular payment for some students could lead to funding being unavailable later in the year for students whose circumstances change and face financial hardship later in the year.
- Providers receive different amounts of money and/or have the capacity to "top up" the fund. Providers will therefore be able to offer students at different institutions differing amounts, leading to the fund being used as a competitive lever rather than its intended use of meeting the needs of students.
- Regular payments will make the process far more bureaucratic and more difficult to administer.

In determining arrangements for assessment and payment of the 16-19 Bursary Fund the School is subject to equalities legislation, which means that students must not be discriminated against, either directly or indirectly, on the basis of their protected characteristics. The School is also subject to the public sector equality duty in section 149(1) of the Equality Act 2010

Receipt of both vulnerable student bursaries and discretionary bursaries is conditional on the student meeting agreed standards, relating to attendance and/or standards of behaviour. These conditions are clear, available and understood by students. Evidence of conditions and that a student has agreed to them is kept in an agreement that is signed by the student.

For both vulnerable bursaries and discretionary bursaries, the School requests evidence of eligibility from students and students cannot self-certify their eligibility for the 16-19 Bursary Fund. This process is documented, through the use of an eligibility checklist and copies of the evidence provided are securely retained.

When assessing the need for financial support, the School does consider other exceptional circumstances, such as where a student is providing care to a sick or disabled relative: they are unlikely to be receiving Carer's Allowance, though this is possible if they are in learning for less than 21 hours a week. In most cases i.e.: where not in receipt of Carer's Allowance, the School will establish the circumstances of the student, including what other benefits the household is receiving and whether the student is providing care for short or long periods.

DISTRIBUTION OF DISCRETIONARY AWARDS

The discretionary bursaries' element of the fund is distributed at the discretion of the School as a full payment or a contribution towards a cost.

Payment can be for one off items such as:

- books/equipment
- course costs such as trips, visits, materials, etc

Payment can be required more regularly or for the issuing of vouchers/passes for items such as:

- transport costs
- meals, etc

Or, payment can be for emergencies such as:

- accommodation costs until the student's benefits are received

WITHHOLDING OF FUNDS AND BUDGETING

10% of the funding will be retained for students who may face financial hardship during the academic year.

This may be for students who move into the "vulnerable" student category during the academic year, a student who is now facing financial hardship but may not have been at the start of the year, or a student who joins the School during the academic year.

ANNUAL ALLOCATION

A budget will be set for each element of the fund, based on each year's allocation:

Category	£	Notes
Vulnerable Groups students	£1,200	
Total	£1,200	Vulnerable Student Bursary Allocation for 2019/20
Hardship Fund	£22,736	Balancing fund
Contingency/Withheld funding	£2,525	10% of Hardship element for in-year recruitment
Administration	£1,330	5% of total
Total	£26,591	Discretionary Bursary Allocation for 2019/20

EXCLUSIONS – WHAT THE BURSARY CANNOT BE USED FOR

The bursary fund will not be used by the school for any reason that would give it a competitive advantage over other institutions, such as:

- enrolment or administration fees imposed by the institution
- fees for access to facilities in the institution
- block subsidy of the canteen
- block subsidy of transport
- block provision of equipment, material or books
- paying bonus payments to reward attendance or achievement

Block payments to students for attendance irrespective of their actual financial need will not be paid. The bursary fund is for supporting students who have a genuine financial difficulty that might prevent them from continuing in education, rather than acting as an incentive for attendance.

PURCHASING ICT EQUIPMENT

If IT equipment, for example, a laptop or tablet is necessary and the student cannot complete the course without it, it can be purchased with bursary funds.

IT equipment will be loaned to students and should be returned once the study programme has been completed so it can be used by another student. If keeping it on campus is the best way of ensuring that this happens, then the School has the right to set this as a condition.

16-19 Bursary Fund

Information needed to check Financial Assessment Form

- Age:** Students should be under 19 years of age on 31st August 2019
- Bank/ B Soc a/c** This should be an account that accepts BACS payments and should be the student's own bank account where possible
- Free School Meals** If the student or his/her siblings are in receipt of Free School Meals for the current year, the household income will have been assessed and there is no need to carry out further checks. The School should have an up to date list of those students receiving FSMs.
- Vulnerable Group** These students should show appropriate evidence that they are in this group. This will include:
- Letter from the Local Authority (usually a social worker/transitional manager) to confirm the young person's current or previous looked after status
 - Recent Entitlement or Award letter showing the young person is in receipt of:
 - o Income Support
 - o Disability Living Allowance and Employment Support Allowance
- There is no need to carry out additional income checking for this group.
- Means Assessing** There are five main types of income evidence:
- **Tax Credit Award Notice (TC602)** – this is a document from the Inland Revenue detailing entitlement to Working Tax Credits or Child Tax Credits. The income figure required is shown as **Total Income for the year from 6 April 2017 to 5 April 2018**
 - **P60** – this is a statement of earnings from an employer. Check that the P60 is for the correct adult and for the correct year (Tax Year to 5 April 2018). The income will be shown as either:
 - Total Pay for year
 - Total Income received
 - Gross Income
 - **Entitlement / Award letter** showing evidence of benefits received
 - **Self assessment tax calculation form (SA302)**. This form is sent by the Inland Revenue to self employed people and is the equivalent of the P60. Check that the name is for the correct person and that date is for the last complete tax year. The income will be shown under Total Income
 - **Universal Credit** showing evidence of benefits received

Records of evidence will be kept securely for audit / monitoring purposes. Students will need to provide copies of documentation.