



Interaction & Communication

— Academy Trust —

ICAT 16-19 Bursary Policy

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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 which is available and the means of applying for it
- Make clear to parents 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 2021 to 2022 academic year](#).

This policy complies with our funding agreement and articles of association.

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 Board of Directors

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.

In our Trust, responsibility for approving and monitoring this policy has been delegated to the Resource, Audit and Risk Committee.

4.2 The Director of Finance

The Director of Finance is responsible for ensuring staff are familiar with the 16 to 19 bursary fund policies, 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 will provide staff with appropriate training in relation to this policy and its implementation.

4.4 Parents

Parents are expected to notify the relevant staff 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 two types of 16 to 19 bursaries:

- Bursaries for defined vulnerable groups of up to £1,200 (per academic year); and
- Discretionary bursaries

We use the fund to provide students with support to fund:

- Add to/amend this list as necessary:
- Transport
- Books
- Equipment
- Field trips and other course-related costs

6. Eligibility criteria for the 16 to 19 bursaries

6.1 Age

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

Students aged 19 or over are eligible only for a discretionary bursary if they:

- Are continuing on a study programme or course which they began when they were aged 16 to 18 years old, or

- Have an education, health and care (EHC) plan

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 one of these groups:

- Be funded directly by ESFA or by 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

Non-employed students aged 16 to 19 who are participating in a Prince's Trust Team Programme are also eligible to receive a bursary in the same way as any other student participating in an eligible, publicly funded course.

Students are not eligible if:

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

Students who are studying via distance learning are eligible for 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](#). The trust may be required to request evidence to support this.

6.4 Bursaries for young people in defined vulnerable groups (up to £1,200 per academic year)

Students with a financial need, who meet one 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. A letter (Appendix A) will be issued at the start of each academic year inviting students to apply via the trust application form (please see Appendix B).

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

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, we will look at cases

individually and base the outcome 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.

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.

The Trust may decide that although a young person may be eligible for a bursary because they are in one or more of the defined vulnerable groups, they do not have any actual financial need. This might be because their financial needs are already met and/or because they have no relevant costs. The Trust can refuse a student's application on this basis. Similarly, students should only receive the amount they actually need to participate and not automatically receive £1,200 if they do not need the full amount.

6.5 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 if they satisfy one or more of the following criteria:

- Level of household income (must be less than £20,000.00)
- Whether the pupil is eligible for Free School Meals
- Is a young person in care
- Is a young care leaver (previously in care or foster care)
- Is in receipt of Income Support or Universal Credit in their own right and are financially supporting themselves and anyone who is dependent upon and living with them
- The number of dependent children in the student's household

A letter (Appendix A) will be issued at the start of each academic year inviting students to apply via the trust application form (please see Appendix B)

Students who do not satisfy any of the criteria listed in this section, but who are able to demonstrate financial hardship arising from other reasons, may apply for a discretionary bursary.

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.

6.6 Evidence

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

- Previous 3 to 6 months' worth of pay slips
- P60
- Written confirmation of a student's current or previous looked-after status from the relevant local authority and/or
- Written confirmation of a benefit award or tax credit notice, in the name of the student (for either bursary) or the parent (for the discretionary bursary)

7. Application and payment process

7.1 Applications

Applications should ideally be submitted by the last Friday in September 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 in-kind payments, such as travel passes, books, equipment or vouchers for meals
- transferred directly into student's bank accounts. Payments should not be made into another person's account, except in exceptional circumstances where a student is unable to administer their own account. Payments may be made to a joint account, as long as the student is one of the account holders

Vulnerable Group Bursary:

Payment will be a maximum of £1,200 per year paid half-termly provided the student meets the required criteria and has financial need.

Discretionary Bursary:

Successful applicants will receive an agreed payment on a termly basis.

7.3 Conditions for the receipt of bursary payments

Payments will be stopped if a student withdraws from a study programme.

8. Change in circumstances

If there are changes in circumstances which 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, household income evidence and any agreements signed by students) will be kept securely in line with our data protection policy, privacy notices and record retention schedule.

10. Monitoring arrangements

This policy will be reviewed by the Resource, Audit and Risk Committee annually.

Appendix A

Dear Parent/Carer

Re 16-19 Bursary Fund

You may be aware that some students in Post 16 can be eligible for minor financial assistance if they meet certain criteria. Further information can be found in the attached 16-19 Bursary Policy.

The application process for either the Vulnerable or the Discretionary Award is the same: please complete the enclosed form indicating which type you are claiming for.

Proof of evidence will be required to support an application.

If you are applying for the Discretionary Bursary you will need to provide evidence of the following:

- Level of household income (must be less than £20,000.00)
- Whether the pupil is eligible for Free School Meals
- Is a young person in care
- Is a young care leaver (previously in care or foster care)
- Is in receipt of Income Support or Universal Credit in their own right and are financially supporting themselves and anyone who is dependent upon and living with them

If you are applying for the Enhanced Bursary you will need to provide evidence that:

- the pupil is in care (NB: those who are privately fostered are not classed as looked after)
- the pupil is a care leaver;
- the pupil is in receipt of 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
- the pupil is in receipt of 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

What happens next?

Discretionary Bursary:

Once the application process is closed the assessment panel will meet and a decision made on the value of the award per student. The value of the award varies from year-to-year dependent on government funding and each share of the fund will also depend on the number of applicants. You will then receive a letter explaining how much your award is and how it will be paid.

Enhanced Bursary:

Once the application process is closed the assessment panel will meet and a decision made on the value of the award per student. The value of the award is up to the value of £1,200, the amount is dependent on the panels assessment of need as per the 16-19 Bursary Policy that can be found on the school and Trust website.

All you need to do is complete the enclosed form and return to school by <INSERT RETURN DATE> and we can do the rest. If you need any help with this, please contact <INSERT STAFF NAMES>.

Kind regards

<INSERT PRINCIPAL NAME>

Appendix B

APPLICATION FOR 16-19 BURSARY FUND

Learner Details

Surname	First Name	Date of Birth
Address Postcode.....	Contact Details Name of parent/carer Telephone (Home) Telephone (Mobile) E mail	
You must be aged 16 – 19 on 31st August		

Vulnerable Bursary

If a young person falls into any of the following groups, they are entitled to a vulnerable bursary of £1200. Please indicate which of the following the young person falls into:

In care	Yes <input type="checkbox"/> No <input type="checkbox"/>
A care Leaver	Yes <input type="checkbox"/> No <input type="checkbox"/>
In receipt of Income Support or Universal Credit because they are financially supporting themselves.	Yes <input type="checkbox"/> No <input type="checkbox"/>
In receipt of Employment Support Allowance or Universal Credit AS WELL AS Disability Living Allowance or Personal Independence Payments in their own right.	Yes <input type="checkbox"/> No <input type="checkbox"/>

Financial

Are you and /or your sibling (s) in receipt of Free School Meals? Yes <input type="checkbox"/> No <input type="checkbox"/>
Sibling Name (s)
School (s) Attending

If you or our siblings are in receipt of Free School meals, you do not need to provide further financial information in the financial assessment section.

However, where you may be eligible to receive an award of £1200 as a member of a named vulnerable, you will need to provide evidence to support that claim relating to certain benefit categories below.

Household Members

Person 1 First name Surname..... Relationship to learner..... Telephone Numbers.....	Person 2 First name..... Surname..... Relationship to learner..... Telephone Numbers.....
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Financial Assessment – Income

To be completed by the person (s) responsible for the household bills

Person 1	Are you employed? Yes <input type="checkbox"/> No <input type="checkbox"/>	If yes, please submit P60 for details
Person 2	Are you employed? Yes <input type="checkbox"/> No <input type="checkbox"/>	If yes, please submit P60 for details

If you are not employed, please tick the relevant boxes to indicate the benefit (s) you receive.

Benefit received	<i>Income Support</i>	<i>Job Seekers Allowance</i>	<i>Employment Support Allowance</i>	<i>Incapacity Benefit</i>	<i>Carer's Allowance</i>	<i>Housing Benefit</i>	<i>Council Tax Benefit</i>
<i>Person 1</i>							
<i>Person 2</i>							

Financial Assessment – Other Income

Please tick the relevant boxes to indicate all other income received into the household.

<i>Other Income</i>	<i>Working Tax Credit</i>	<i>Child Tax Credit</i>	<i>Grants or Bursaries etc..</i>	<i>Any other income/benefits please specify</i>
<i>Person 1</i>				
<i>Person 2</i>				
<i>Applicant</i>				

Evidence

Whatever you have declared above must be backed up by evidence (photocopies accepted) in order for an assessment to be made.

The table below shows the evidence you will need to provide with your application form.

TYPE OF INCOME	EVIDENCE REQUIRED
Annual Salary	P60 for previous tax year, or week 52 (last week in March of current year) payslip or Month 12 (March (current year) payslip)
Income Support	Entitlement/Award letter- dated within the last 3 months
Job Seekers Allowance	Entitlement/Award letter- dated within the last 3 months
Disability Living Allowance	Entitlement/Award letter- dated within the last 3 months
Employment Support Allowance	Entitlement/Award letter- dated within the last 3 months
Incapacity benefit	Entitlement/Award letter- dated within the last 3 months
Carer's Allowance	Entitlement/Award letter- dated within the last 3 months
Housing benefit	Entitlement/Award letter- dated within the last 3 months
Universal Credit	Entitlement/Award letter- dated within the last 3 months
Working Tax Credit	Working Tax Credit award notice marked current year. Must be for full year and not partial awards (FULL AWARD NOTICE)

Child Tax Credit	Child Tax Credit award notice marked current year. Must be for full year and not partial awards (FULL AWARD NOTICE)
Grants or Bursaries etc	Relevant paperwork detailing entitlement and amount paid
Personal Independence Payments	Entitlement/Award letter- dated within the last 3 months

Declaration

Please carefully read the declaration below before signing.

1. I declare that the statements made on this form are true and to the best of my knowledge and belief are correct in every aspect. I undertake to supply any additional information that may be required to verify the particulars given. I understand that if I refuse to provide information relevant to my claim the application will not be accepted. I also undertake to inform the school of any alteration to any of the particulars in writing. I agree to repay the school in full and immediately any sums advanced to me if the information I have given is shown to be false or deliberately misleading.
2. I am aware that the funding covers only this school year and that I must re-apply next year. There is no guarantee that I will receive funding for future years even if I am eligible for the current year.
3. I undertake to open a bank account in the name of the applicant as if successful with this application any payments under the bursary will be payable to the student.

Signed (Learner/Parent/Carer) Date



Education & Skills
Funding Agency

Appendix C 16 to 19 Bursary Fund checklist

You should use this checklist when assessing student applications for support from the 16 to 19 Bursary Fund.

Eligibility: All Bursaries

	Student meets the age criteria.
	Eligible education provision.
	Student meets the residency criteria for post-16 provision.
	Evidence of eligibility has been retained.

Bursary for defined vulnerable groups

	Student falls within one of the defined vulnerable groups for example, in receipt of the specified benefits in their own right or in care/care leaver.
	Financial needs assessment carried out to confirm actual financial need and amount of support required. No student should automatically receive £1,200.
	Appropriate evidence seen and copies retained to confirm student's eligibility.
	Support awarded in kind (bus pass, meal vouchers, books or equipment purchased on student's behalf). Receipts should be retained.
	Award letter issued to student confirming the amount of support, what support will be made in-kind and payment conditions.

Discretionary bursary

	Evidence to confirm the student meets the institution's bursary fund criteria, including household income and statement of actual participation costs.
	Evidence of income and overall eligibility obtained, and copies retained.
	Assessment of student's actual financial needs carried out. Block, blanket or flat rate payments are not permitted – the bursary award should reflect the actual costs the student has.
	Support awarded in kind (bus pass, meal vouchers, books or equipment purchased on student's behalf). Receipts should be retained.
	Award letter issued to student confirming the amount of support, what support will be made in-kind and payment conditions.

