

Queen Elizabeth's Girls' School

16-19 Bursary Fund Policy

POLICY TITLE: 16-19 Bursary Fund Policy

STATUS: Statutory

REVIEWED BY: D Jones

DATE AGREED BY GOVERNORS: July 2020

DATE OF NEXT REVIEW: June 2021

1. Introduction

The 16-19 Bursary Fund provides financial support to help students overcome specific financial barriers to participation so they can remain in education. The fund is money given to post-16 providers by the Education and Skills Funding Agency (ESFA). Many will experience financial difficulties with costs such as transport, food or equipment. Eligibility is based on the student meeting residency requirements and being on a means-tested or disability benefit.

2. The Bursary Scheme

There are two types of 16 to 19 bursaries:

- I. Higher-priority claimants (defined vulnerable groups) who will receive a bursary of up to £1,200.00 per year from the school fund
- II. Discretionary bursaries awarded to Mid and Lower-priority claimants, to meet individual needs. For example, to help with the cost of transport, meals, books, equipment, field trips and other course-related costs.

The school is responsible for managing both types of bursary. Students who want to apply for support from the bursary fund should complete and submit an application form by Friday 18th September 2020.

3. Eligibility criteria – all bursaries:

To be eligible for either type of bursary in the 2020/21 academic year, the student must:

- Be aged over 16 and under 19 at 31 August 2020
- Be aged 19 or over at 31 August 2020 and have an Education, Health and Care Plan (EHCP)
- Be aged 19 or over at 31 August 2020 and continuing on a study programme they began aged 16 to 18 ('19+ continuers')
- Meet the residency criteria in section 3 of the ESFA document '[Funding guidance for young people 2020 to 2021](#)'. Section 3 of this document also specifies the evidence the school must see to confirm eligibility.
- The student must also meet the criteria of either the higher, mid or lower-priority group (see 3.1-3.3 below).

3.1 Criteria for the vulnerable bursary (higher-priority group - Priority 1)

Students must fall into one or more of the categories below to be able to apply for a Priority 1 bursary:

1. In care
2. Care leavers
3. Young people in receipt of Income Support or Universal Credit 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
4. Young people in receipt of Disability Living Allowance or Personal Independence Payments in their own right as well as Employment and Support Allowance (ESA) or Universal Credit (UC) in their own right.

Defining in care and care leavers

The 16 to 19 Bursary Fund defines 'in care' 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) - Section 22 of the Children Act 1989 defines the term 'looked after child'.'

A '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

More information about Income Support can be found at www.gov.uk/income-support

More information about Universal Credit can be found at www.gov.uk/universal-credit

More information about Employment and Support Allowance can be found at www.gov.uk/employment-support-allowance

More information about Personal Independence Payments can be found at www.gov.uk/pip

The allocation of these funds will be subject to audit so the school will require proof that the application is genuine in the form of written evidence from the young person and her key worker. The school will seek and retain copies of evidence from the young person, bearing in mind confidentiality. Appropriate evidence includes,

- for students who are in care or a care leaver, written confirmation of their current or previous looked-after status from the relevant local authority. This is the local authority that looks after them or provides their leaving care services. This could be a letter or an email but must be clearly from the local authority
- for students in receipt of Income Support or Universal Credit (UC), a copy of their Income Support or UC award notice. This must clearly state that the claim is in the student's name/confirm they are entitled to the benefits in their own right. The evidence must not state any conditions that prevent them from participating in further education or training. For students in receipt of UC, institutions must also see a tenancy agreement in the student's name, a child benefit receipt, children's birth certificates, utility bills and so on
- for students receiving UC/ESA and Disability Living Allowance and Personal Independence Payments, a copy of their UC claim from DWP. Evidence of receipt of Disability Living Allowance or Personal Independence Payment must also be provided

In some cases a young person might meet the eligibility criteria for a bursary for vulnerable groups but their financial needs are already met, they have no relevant costs or do not need the maximum award.

3.2 Criteria for mid-priority group (Priority 2)

Where a student does not meet the higher-priority group criteria she may still be eligible for support. The school's criterion is students who are entitled to free school meals (FSM). The school will need to be satisfied that the application is genuine following the standard procedures that are currently in operation for application for FSM.

3.3 Criteria for lower priority group (Priority 3)

Where there is a surplus of funds after the allocation to students in Priority 2, then students with household incomes of less than £20,817 may apply for a lower level of support determined by their specific needs. See section 5 below regarding how the funds are allocated.

The following evidence will be required for students in this group:

- A copy of entitlement to means-tested state benefit, or Tax Credit Award Notice confirming household income of less than £20,817; or
- Evidence of income from self-employment, a P60, or 3 to 6 months' worth of bank statements as evidence; or
- 3 most recent monthly award statements for Universal Credit.

4. Applications

The fund will be open for applications for the following academic year from July each year. Application forms should be completed electronically and should be submitted by 18th September 2020. Please see the Sixth Form section of the school website to access the application form. Funding is not guaranteed by the acceptance of an application form.

5. Allocation

All decisions about which students receive a discretionary bursary and how much bursary they receive are based on each student's individual circumstances and their actual financial need. These will vary from student to student depending on, for example, their household income, the number of dependent children in the household, the distance they need to travel to school and the requirements of their study programme.

Once it is established who will be supported, the funds will need to be divided:

- up to 5% of the fund will be held back to cover administrative costs
- Some funding will be held back for applicants who join later on in the year or whose personal circumstances change.
- The allocation to the Priority 2 students needs to be fair; students that apply will be assessed individually based on their actual financial need.
- If there is still money in the fund after allocation of funds to Priority 2 students referred to above then students with household incomes of less than £20,817 may receive financial support. This could be in the form of the payment for specific items required (e.g. textbook or trip that is necessary for course of study).
- The allocation criteria will reflect the school's Equalities policies and codes of practice, and be endorsed by school committees.
- Where a student is required to attend a subject related trip (e.g. Geography field trip) the appropriate amount will be deducted from the allocation.
- The funding for Priority 1 students comes from the Student Bursary Support Service (SBSS) and is held centrally, so does not form part of the allocation set out above.

6. Conditions for Receipt of Student Bursaries

Receipt of both vulnerable student bursaries (Priority 1) and discretionary bursaries (Priority 2 and 3), is conditional on the student meeting the following standards,

- no unauthorised absence during the period the payment covers
- no lates without a valid reason during the period the payment covers
- good behaviour

Evidence that each student has agreed to these conditions will be shown by the signed declaration in the application form (see Appendix 2).

7. Appeals

Students have the right to appeal a decision. Students, or their parent/guardian, will be required to put any appeal in writing within 21 days of receiving confirmation of an award or a rejection.

1. The letter should set out the reasons for the appeal, which must prove that the student has been wrongly assessed as falling outside the eligibility criteria, plus any further evidence to support the Appeal. It should be sent to the Sixth Form Office.
2. The decision of the Appeals panel is final and will be given in writing within 14 days of the decision.
3. The Appeals panel will consist of,
 - a. A member of the 6th Form team
 - b. A Trustee
 - c. A member of the Senior Leadership Team

The Appeals panel meeting will be clerked by a member of the school's administrative/finance team.

8. Payment

The school will base all decisions about which students receive a discretionary 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, depending on, for example, their household income, the distance they need to travel to the institution and the requirements of their study programme. The school will not make bursary fund payments as regular payments for living costs as this is out of scope of the bursary fund.

- The school will use payment in kind wherever possible e.g. course materials, travel passes and meals. Students will need to itemise their requirements, seek approval from the school prior to any purchase and provide receipts as evidence.
- Where payments in kind are not possible, the school will make use of BACS transfer for payment.
- Eligible students will receive a small amount of money each term to cover general requirements to support their learning such as stationery.
- Payments will be contingent on the student meeting targets for attendance and punctuality (see section 6 above).
- Some of the money to cover an individual's curriculum-related activities such as field trips or special equipment may be held back.

9. Audit

The fund should be audited in line with the school's standard audit procedures.

11. Monitoring and Review of the Bursary Fund

A senior manager will oversee the operation of the Bursary Fund, and establish clear monitoring of its operations through the school management structure.

This policy, and its operation, will be reviewed by Senior Leadership Team/Trustees at the end of each academic year to:

1. review the allocations and criteria for awards for the 16-19 Bursary Fund
2. monitor expenditure on a termly basis
3. track student retention
4. set and monitor Service Standards for claimant

Surname/Family Name	
First names	

Section 7: For completion by the school

I confirm that this applicant meets the residency criteria under which a bursary may be paid. I confirm that this applicant is enrolled on a programme of study under which a bursary may be awarded. I confirm that the expenditure detailed in Section 3 is relevant and appropriate for the programme of study being followed by this applicant. I confirm that for Priority 3 that the School has reviewed the appropriate household income to confirm suitability.

Tick if priority criteria are met with supporting evidence provided

Priority 1	<input type="checkbox"/>	Priority 2	<input type="checkbox"/>	Priority 3	<input type="checkbox"/>
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Number of dependents in household	<input type="text"/>
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Support required	Tick	Amount
Books/equipment	<input type="checkbox"/>	
Additional course costs, e.g. trips	<input type="checkbox"/>	
Transport	<input type="checkbox"/>	
Specialist clothing (such as protective overalls, for example)	<input type="checkbox"/>	
Meals	<input type="checkbox"/>	
Travel to university interviews	<input type="checkbox"/>	
Other miscellaneous items	<input type="checkbox"/>	
Total		

Signed		School Stamp	
Name			
Position			
Date			

Priority 3 Household Income Review	£
Confirmed Earnings as an Employee	
Working Tax Credit	
Child Tax Credit	
Total (to be less that £20,187)	