



16-19 Bursary Fund Policy

Legislation/Guidance		External Checking	
EFSA's 16-19 Bursary Fund Guide: 2018 to 2019 academic year			
Teaching Unions	Consultation Completed	Public Sector Unions	

Published:	Review:	Last Reviewed:	Statutory:	Committee:	SLT Lead:
September 2018	July 2019	September 2018		F&R	MDU/MLD
Legislation checked:			Legal Advice:		

Principal: Mrs Christine Horrocks BSc (Hons) NPQH Chair of Governors: Dr Derek Cheetham

Hallcroft Road, Relford, DN22 7PY T: 01777 713700 F: 01777 713711 E: office@elizabethan.notts.sch.uk www.elizabethan.notts.sch.uk

THE ELIZABETHAN ACADEMY

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16-19 Bursary Fund Policy

1. Introduction

The 16-19 Bursary Fund is the successor to the Education Maintenance Allowance (EMA) Scheme and was introduced during 2011 to help young people aged 16-19, who were facing financial hardship. Its purpose is to provide financial support to help students overcome specific barriers to participation, so they can remain in education.

There are 2 types of 16 to 19 bursaries:

- Bursaries for defined vulnerable groups of up to £1,200 a year
- Discretionary bursaries which institutions award to meet individual needs. For example, help with the cost of transport, meals, books and equipment

The Elizabethan Academy's policy is based on the Education and Skills Funding Agency's "16-19 Bursary Fund Guide for 2018/19".

2. Eligibility Criteria

To be eligible to receive a 16-19 bursary in the academic year 2018/19 the student must be aged 16 or over but under 19 years on 31 August 2018. **Additionally**, Students must meet the residency criteria in ESFA funding regulation for post-19 provision in the 2018 to 2019 academic year. Generally this means that they must have the right of abode in the UK and have been a resident in the UK for at least the last three years.

2.1. Vulnerable Bursary

Eligibility:

A bursary of £1,200 per annum is available to students who are:

- in care
- care leavers
- receiving Income Support (IS) or Universal Credit (UC) because they are supporting themselves or financially supporting themselves and someone who is dependent on them and living with them such as a child or partner
- receiving Disability Living Allowance (DLA) or Personal Independence Payments in their own right as well as Employment and Support Allowance (ESA) or Universal Credit in their own right

Please note that to qualify as eligible for a vulnerable student payment the young person does not have to live independently of their parents; they can claim ESA or UC in their own right. Parents should note that they will not be able to claim Child Benefit for them if the young person's claim for ESA succeeds.

The definition of 'in care' and 'care leavers' is taken from the government's 16-19 bursary guide for 2018-19.

Evidence of Eligibility:

- A copy of Income Support award notice
- A copy of Universal Credit award notice
- A letter setting out the benefit to which the learner is entitled
- Written confirmation of current/former 'Looked After' status from the relevant Local Authority
- Leaving Care Review document

2.2. Discretionary Bursary

Eligibility:

Bursaries under this heading may be awarded on an identified need and at the discretion of the Elizabethan Academy. They can be for varied amounts and are targeted on overcoming the individual barriers a student faces to remain in education. This includes payments for things like transport, meals, books and equipment.

To be eligible under the discretionary category the learners must be currently in receipt of free school meals or be able to evidence a household income of less than £26,100 per annum.

As the bursary is discretionary there may be some flexibility, e.g. consideration may be given to the number of dependants in a household.

Evidence of Eligibility:

If you, (the student/learner) or your siblings, are in receipt of Free School Meals, you do not need to provide further financial information in the Financial Assessment section.

If you are not currently in receipt of free school meals then you need to provide evidence that the household income falls below £26,100 per annum.

Whatever income/benefits you declare in your application must be backed up by evidence (photocopies accepted) in order for an assessment to be made. Examples of types of acceptable evidence are shown in the table below.

Type of Income	Evidence Required
Annual Salary	P60 for last tax year, or week 52 (last week in March) payslip or month 12 (March) payslip
Income Support/Universal Credit	Entitlement / Award letter – dated within the last 3 months
Job Seekers 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
Council Tax Benefit	Entitlement / Award letter – dated within the last 3 months
Any other benefit	Entitlement / Award letter – dated within the last 3 months
Working Tax Credit	Working Tax Credit Award Notice marked for current year. Must be for full year and not partial awards (FULL AWARD NOTICE)
Child Tax Credit	Child Tax Credit Award Notice marked for current year. Must be for full year and not partial awards (FULL AWARD NOTICE)
Child Benefit	<i>This is not included as income for the purposes of the financial assessment</i>
Grants or bursaries etc.	Relevant paperwork detailing entitlement and amount paid
Disability Living Allowance/Personal Independence Payment	Entitlement / Award letter – dated within the last 3 months
Any other income	Relevant paperwork, e.g. evidence of income from self-employment

A copy of the evidence submitted will be securely stored within school. This will be processed by the school finance office and destroyed six years after the application has been dealt with, in accordance with statutory financial regulations. The student must inform school immediately of any changes to status otherwise money may have to be paid back to the school.

PLEASE NOTE:

Passing the eligibility threshold for a discretionary bursary **does not** guarantee funding. The individual circumstances of all applicants, the funding available and the nature of the funding request will all be deemed relevant, differentiating factors.

3. Criteria for Payments under the Discretionary Bursary

3.1. Payments will be made according to the following criteria:

- Nature of the application – priority will always be given to essential curricular requests.
- The finances available within the fund, i.e. should there be insufficient funding to meet all requests for bursaries then awards will be scaled down proportionally.
- Exceptional unforeseen circumstances which would affect the learner’s ability to participate in their programme of study.
- To continue to receive payments from the discretionary bursary fund, students must be at least making progress towards their targets in all of their reviews and attain 98% attendance or above, unless exceptional circumstances apply.

- Mid-year arrivals/applicants will receive a proportion of the bursary in line with the remaining time of their course.
- School may cover the full cost of an item; make a contribution towards the cost; or may support the student through the loan of equipment.
- Loans of specific equipment made under the 16-19 Bursary remain the property of Elizabethan Academy and must be returned to the school at the end of the academic year or on leaving school.

3.2. Payment awards will be made up to the maximum limits set out below per student except in the most exceptional of circumstances:

Meals:	£3.00 per day allowance on The Elizabethan Academy's cashless catering system. This may be used at any of the school's catering outlets, such as the 6 th form cafeteria, main dining hall.
Stationery & Equipment:	Up to a maximum of £100 per annum. (<i>Payment for extended warranty cover of equipment is not eligible</i>).
Books:	Up to £100 per annum.
Travel to & from School:	Variable, receipts required. Travel costs should be claimed on a weekly or monthly basis.
Trips:	Up to £200 p.a. per trip for enhancement trips/activities. <i>Leisure trips may be excluded</i> . Claim through presentation of reply to trip letter.
Interviews:	50% to 100% of travel costs for the student only. A small subsistence allowance is also available to claim with receipts.
Clothing:	Up to £300 per annum for clothing in line with the school's dress code.

In all relevant cases, original receipts must be provided prior to reimbursement. Reimbursement will not be made without a valid receipt which must be attached to a signed claim form. Please note claims for clothing must relate to the school's dress code.

4. Authorisation

The payment awards decision will normally be made by Mr Dainty, Assistant Principal and the Director of KS5.

If there is insufficient funding to meet all of the requests, or if an award is rejected for reasons other than eligibility, the awards decision will be made by the 16-19 Bursary

Board. This will also be the case if a single application exceeds the limits outlined above. Reference will be made to the criteria stated in point 3 above.

5. 16-19 Bursary Board

The Elizabethan Academy's 16-19 Bursary Board will consist of the Director of KS5; the Chief Finance and Operations Officer and one Governor Representative.

6. Applications to the Discretionary Fund

- 6.1. Books, trips and visits can be expensive in the sixth form so we encourage students to apply for funding, should they meet the criteria.
- 6.2. Students need only apply to the Discretionary Fund once each academic year.
- 6.3. Application forms must be submitted, along with the financial assessment form and accompanying evidence of income, by the end of the first half-term.
- 6.4. Students experiencing a change of circumstances during the course of the year may submit an application at any time.
- 6.5. In most cases applications will be processed within two weeks after the half-term break and applicants will be informed in writing of the decision.
- 6.6. If a 16-19 Bursary Board meeting is convened, payment will occur within two weeks of the decision.
- 6.7. Reimbursements will be made in accordance with section 3 'Criteria for Payments under the Discretionary Bursary' above.
- 6.8. Payments will normally be made by BACS transfer and applicants will be informed in writing of the payments made.
- 6.9. Sometimes payments will be made in kind, such as the meal allowance and payment for school trips.
- 6.10. The meal allowance for the first half-term will usually be paid in arrears by BACs, whilst applications are being assessed.

7. AS to A2 Transition Fund

Eligible learners will be able to apply for AS to A2 Transition Fund in June of their AS year. This will be distributed from any remaining funds in the School Bursary Allocation. The criteria used will be as outlined in section 3 above

8. Appeals

8.1. A three stage appeals process exists:

- **Stage 1:** Appeals must be made to the Director of KS5. This will ordinarily simply provide clarification of the Award and eradicate factual errors. These will be discussed with the Chief Finance and Operations Officer.
- **Stage 2:** Written appeal to the Principal.

- **Stage 3:** Written appeal to a Governors' Panel consisting of three Governors at which both the applicant and the school have the right to be represented.
- 8.2. At no point in the process will the circumstances of other Bursary awards be discussed for reasons of confidentiality.
- 8.3. Appeals must be made within two weeks of notification of the award decision. If the matter is unresolved, the Appeal Stage 3 will be heard, as soon as a meeting can reasonably be convened.

9. Budgeting and Administration

- 9.1. The Elizabethan Academy's 16-19 Discretionary Bursary Fund allocation for 2018/19 amounts to £11,050. Of that total:
- 20% will be held back as a contingency fund.
 - 5% is used to cover Administration costs.
 - 75% is available for distribution over the academic year.
- 9.2. Any underspends from 2017/18 will be rolled forward to 2018/19 and used with the discretionary funding for that year.
- 9.3. Any Vulnerable Bursaries paid to students are claimed back by School from the Education Skills and Funding Agency and do not form part of the above Discretionary Fund allocation.
- 9.4. Any vulnerable bursary funding claimed, but no longer required (e.g. if the learner has subsequently left school) will be recycled into the discretionary bursary fund from 01 May 2019. *(Prior to this date it was used to fund other vulnerable bursaries).*
- 9.5. Secure records will be kept of all awards, receipts and payments for audit purposes for a period of six years in accordance with statutory financial regulations.
- 9.6. All unsuccessful applications will be shredded after a period of six months from the date of the receipt.
- 9.7. A report on the number of awards made and the total value will be provided by the Chief Finance and Operations Officer to the Governors' Resources committee each year.

10. Publication of the Policy

- 10.1. This policy will be published on The Elizabethan Academy's website:
- 10.2. Also published on the website are:
- An explanatory letter to students
 - The 16-19 Bursary Application Form
 - Financial Assessment Form
- 10.3. The students are informed about the 16-19 Bursary Fund during their induction to the Sixth Form.