 <b>HOLYPORT COLLEGE</b>	<b>16 to 19 Bursary Fund Policy</b>	
	Effective Date: 01.09.22	Version No: v2.2


<b>Title</b>	<b>16 to 19 Bursary Fund Policy</b>
<b>Person responsible for policy formulation, implementation, maintenance and evaluation</b>	Bursar
<b>Persons consulted</b>	Head Master
<b>Adopted by Governors on</b>	07 November 2019
<b>Current Review</b>	9 January 2023
<b>Date of future review</b>	June 24

### REVISION STATUS TABLE

Revision No	Effective Date	Summary of Revision	Reviewed		Approved/Noted	
			By	Date	By	Date
v1.0	07 Nov 2019	New Policy	SLT		GFC Approved	07 Nov 2019
V2.0	23 Oct 2020	Full review and update	SLT	09.11.20	GFC	12 Nov 2020
V2.1	11 November 2021	Review	Bursar	11.11.21	GFC	11 Nov 2021
V2.2	01 Sept 22	Review	Bursar	09.01.23	SLT	9 Jan 23

### POLICY DOCUMENT ANNUAL REVIEW

This Policy document is subject to a periodic review (annually) by Holyport College that is formally documented to ensure its continuing suitability, adequacy and effectiveness. Areas subject to review include, but are not limited to, follow-up action from previous reviews, policy conformity, review of complaints, status of corrective and preventive actions, and improvements for the forthcoming year. Holyport College reserves the right to amend this Policy by notice following such review in circumstances in which it considers such change to be necessary or appropriate.

 <b>HOLYPORT COLLEGE</b>	16 to 19 Bursary Fund Policy	
	Effective Date: 01.09.22	Version No: v2.2

## Background

This policy sets out arrangements for Holyport College to operate the 16-19 Bursary Fund for the academic year 2022-23. This policy is based on the Education and Skills Funding Agency's (ESFA) guidance for the 16 to 19 bursary fund 2022 to 2023 academic year.

## What is the 16-19 Bursary Fund?

The 16 to 19 Bursary fund is a scheme set up by the Department for Education (DfE) and funded by the ESFA for 16-19 year olds - to provide assistance to students whose access to, or completion of, education is inhibited by financial constraints or barriers. The 16-19 year old bursary scheme has been put in place as a replacement for the former Education Maintenance Allowance.

There are two types of 16 to 19 bursaries:

1. Vulnerable bursaries of up to £1,200 a year for young people in one of the defined vulnerable groups
2. Discretionary bursaries that institutions award to meet individual needs (discretionary bursaries are targeted on students who cannot stay in education without financial help for things like transport, meals, books and equipment)

## General Eligibility

To be eligible to receive a Bursary, a student must be aged 16 or over but under 19 on 31/08/2022 and meet the ESFA residency requirements as set out in document **16 to 19 Bursary Fund guide: 2022 to 2023 academic year**. This document sets out the evidence that is required to confirm eligibility.


## Bursaries Available

There are three types of Bursary available:

### Level 1 - Vulnerable Bursary

A Vulnerable Bursary of **up to £1,200** is available to all students who are identified as being:

- currently in care or care leavers (previously looked after for a period of at least 13 weeks since the age of 14)
- 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
- 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

 <b>HOLYPORT COLLEGE</b>	16 to 19 Bursary Fund Policy	
	Effective Date: 01.09.22	Version No: v2.2

**Evidence of Eligibility:**

- Written confirmation from the Local Authority confirming the students current or previous looked after status;
- 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 their name/confirm they are entitled to the benefits in their own right and that they can be in further education or training. They must also provide additional documentation to confirm their independent status such as a tenancy agreement in the student’s name, a child benefit receipt, children’s birth certificates or utility bills;
- For students receiving UC/ESA, Disability Living Allowance (DLA) and Personal Independence Payments (PIP) – a copy of the students UC claim from DWP, evidence of receipt of DLA or PIP must also be provided.

**Discretionary Bursaries**

Discretionary Bursaries are awards made to students to help overcome the individual financial barriers to participating in education, for example to provide financial support towards:


- Travel
- Book and school equipment
- School meals
- Educational Visits, University visits
- Clothing
- Specialist equipment
- Other circumstances that prevent participation

Please note that the school may choose to pay Bursary awards “in kind” e.g. by purchasing text books, school meal vouchers, travel passes or equipment or may make payments directly into the student’s bank account by BACS, in which case receipts will need to be provided.

The allocation process for these funds is as follows:

- Students that apply will be assessed individually against the criteria and will be awarded a bursary fund based on their actual financial need;
- Some funding will be held back for a contingency for students whose personal circumstances may change during the course of the academic years;
- 5% of the discretionary fund will be held back to cover administrative costs.

**Level 2 - Discretionary Bursary**

 <b>HOLYPORT COLLEGE</b>	16 to 19 Bursary Fund Policy	
	Effective Date: 01.09.22	Version No: v2.2

A Discretionary Bursary of up to **£800** is available, subject to availability of funds, to all students in the following circumstances:

- where the student, or a sibling, qualifies for Free School Meals (FSM)
- their **gross** annual household income, as assessed by HM Revenue & Customs, does not exceed **£20,000**
- Wider family circumstances e.g. single parent family, student carer, number of dependent children in household, travel distance to school.

### **Level 3 - Discretionary Bursary**

If funds are available after allocation of the level 2 discretionary bursaries a discretionary Bursary of up to **£400** is available, to all students in the following circumstances:

- their **gross** annual household income, as assessed by HM Revenue & Customs, does not exceed **£25,000**
- Wider family circumstances e.g. single parent family, student carer, number of dependent children in household

### **Evidence**


Acceptable supporting evidence for the **Level 2 and Level 3 Discretionary Bursaries** will be either:

- Three most recent **Universal Credit monthly award statements**
- **P60 End of Year Certificate** for all adults in the household, for the Tax Year to 5 April 2020.
- Three most recent wage slips for all adults in the household.
- If self-employed a copy of your **SA302 form** or **Tax Credit Award** or **Accountants letter** on headed paper
- Confirmation from our FSM checking system that the applicant or a sibling is entitled to **Free School Meals**
- Other most recent **benefits/pension award letter**

### **Contingency Eligibility/Exceptional Circumstances**

Subject to availability of funds, any student meeting general eligibility requirements and facing financial hardship due to exceptional reason or circumstance change can apply to access the contingency funds on an individual basis by submitting an application in writing.

Any applications will be considered by the 16-19 Bursary Application Panel

 <b>HOLYPORT COLLEGE</b>	16 to 19 Bursary Fund Policy	
	Effective Date: 01.09.22	Version No: v2.2

### **Qualifying Condition Requirements**

Eligible students will need to complete a qualifying learning period of 6 weeks before they are able to receive Bursary payments. However, any eligible student can make an application ahead of the six week qualifying period and in a case of extreme hardship, consideration will also be given for payment in advance of the six week period.

All students in receipt of a Bursary must meet the terms of the Sixth Form Code of Conduct to ensure continued support. In addition, all students in receipt of a Bursary must behave appropriately and submit work of an appropriate level and to required deadlines. If the student does not meet these conditions, the school reserves the right to withdraw or suspend Bursary payments.

### **Payments**

The school may choose to pay Bursary payments “in kind” e.g. by purchasing text books, school meal vouchers, travel passes or equipment or may make payments directly into the student’s bank account by BACS, in which case receipts will need to be provided. Payments will be made via BACS to a Bank Account in the name of the student. The student must have a valid account in their name unless there are exceptional reasons, which mean an appointee has been named to manage the affairs of the student.

Payments by BACS will be made on the termly and any receipts for items to be reimbursed should be submitted in plenty of time to be processed by the Finance Team and approved by the Bursar.

### **Application**

Applications for a Bursary must be made using the correct Application Form and should be submitted in full **as soon as possible**. However, once the Bursary Fund has been used, it will not be possible to consider further applications.

Consideration must be given to assisting any student to make an application where they are unable to do so due to a level of learning difficulty and/or disability.


Consideration must also be given to assisting any student in making an application where they are not able to provide supporting evidence due to difficulties with engagement or support from their parent/guardian/carer(s).

### **Process**

All applications for a Bursary or to access the contingency fund will be assessed by a 16-19 Bursary Application Panel consisting of:

- School Bursar
- Head of 6<sup>th</sup> Form
- 6<sup>th</sup> Form link governor

The Panel will review the application, supporting evidence and any other personal circumstantial evidence and students will be notified of the outcome within **two**

 <b>HOLYPORT COLLEGE</b>	16 to 19 Bursary Fund Policy	
	Effective Date: 01.09.22	Version No: v2.2

**weeks** of the application closing deadline which is set as the Friday before the October half term.

### **Appeals**

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

- Headteacher
- Appointed Governor

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 back 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 Complaint Procedure.


### **Confidentiality**

Applications and supporting evidence will be confidential to the 16-19 Bursary Application Panel and in the event of an appeal, the 16-19 Bursary Appeals Panel. The applications and supporting evidence will remain confidential during processing, payment and storage. If it is necessary to obtain additional information to reach a decision, the student and/or their parent/guardian/carer(s) will be told the reasons why this is necessary prior to sharing any information further.

### **Change of Student's Financial Circumstances**

Any student in receipt of a Bursary has a duty to inform the School should their financial circumstances change, or those of their parent/guardian/carer(s) change (e.g. increase in household income that would affect the student's entitlement to Free School Meals). This does not automatically mean any future Bursary payments will be stopped but would result in a convening of the 16-19 Bursary Application Panel to determine whether the payments continue or be stopped and the funds redistributed.

- Appendix A - Information for parent/guardian/carer(s)
- Appendix B - Application Form
- Appendix C - Assessment Checklist
- Appendix D – Example of a Universal Credit Statement

 <b>HOLYPORT COLLEGE</b>	16 to 19 Bursary Fund Policy	
	Effective Date: 01.09.22	Version No: v2.2

## Appendix A: Information for Parent/Guardian/Carer(s)

### 1. What is the 16-19 Bursary Fund

The 16-19 Bursary Fund is a scheme set up by the Department for Education (DfE) and funded by the ESFA. The Fund provides financial support to eligible students to help overcome their specific financial barriers to participation so they can remain in education and training.

### 2. What is it for?

The 16-19 Bursary is a limited fund made available for supporting eligible students with the costs of transport, food, books, educational visits or other course materials or equipment essential to successfully completing their programme of study.

### 3. Who is it for?

The 16-19 Bursary is targeted towards those students considered most in need of financial support. The Government has identified a priority group of students and have asked that Schools give priority to this group first and offer them a **Vulnerable Bursary**.

After this group has been considered, the School expect to have a small amount of funding available for other students in need of financial support. The School has set **eligibility criteria** to ensure the remaining funds go to those who are seen to need it most. Any student who meets these eligibility criteria can apply for one of 2 levels of **Discretionary Bursaries**.

### 4. What are the eligibility criteria?

Students can apply for a Bursary if they are aged 16 or over but under 19 on 31<sup>st</sup> August 2020, meet the national residency requirements and at least one of the criteria listed below.


**Level 1 Bursary** - They can apply for a **Vulnerable Bursary** if they are:

- currently in care or care leavers (previously looked after for a period of at least 13 weeks since the age of 14)
- 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
- 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

**Level 2 and 3 Bursaries** - They can apply for a **Discretionary Bursary** if either:

- your gross annual household income, as assessed by HM Revenue & Customs, does not exceed £20,000 (Level 2) or £25,000 (Level 3) and/or
- they, or a sibling, qualify for Free School Meals (FSM), and/or;
- Wider family circumstances e.g. single parent family, student carer, number of dependent children in household

### 5. Can they still apply if they don't meet the eligibility criteria?

 <b>HOLYPORT COLLEGE</b>	16 to 19 Bursary Fund Policy	
	Effective Date: 01.09.22	Version No: v2.2

Yes, providing they meet the age and residency eligibility criteria. The School is keeping back some of the available 16-19 Bursary Fund for exceptional circumstances for one-off payments or additional support.

#### **6. How and when do they apply?**

To apply, they must complete the **16-19 Bursary Fund Application Form** and submit this to the Bursar with the correct **supporting evidence**.

**For those students already in receipt of the Bursary, supporting documents will need to be supplied each year in order for the Bursary to be continued.**

#### **7. How much is the Bursary?**

The **Level 1 Vulnerable Bursary** is up to £1,200, the **Level 2 Discretionary Bursary** is up to £800 and the **Level 3 Discretionary Bursary** is up to £400. The exact amount is dependent on individual circumstances and an assessment of the financial needs of each applicant will be carried out. The bursary award will reflect the actual costs the student has and funds available.

#### **8. Will the Bursary affect any benefits I may be receiving?**


No, it will not affect any benefits or financial support you are receiving from elsewhere.

#### **9. How and when does it get paid?**

The school may choose to pay Bursary payments “in kind” e.g. by purchasing text books, school meal vouchers, travel passes or equipment or may make payments directly into the student’s bank account by BACS, in which case receipts will need to be provided. Payments will be made via BACS to a Bank Account in the name of the student. The student must have a valid account in their name unless there are exceptional reasons, which mean an appointee has been named to manage the affairs of the student.

Payments by BACS will be made termly and any receipts for items to be reimbursed should be submitted in plenty of time to be processed by the Finance Team and approved by the Bursar.



 <b>HOLYPORT COLLEGE</b>	16 to 19 Bursary Fund Policy	
	Effective Date: 07.11.19	Version No: v2.0

## Appendix B: Application Form


### **Student Details**

Surname	
Forenames	
Address	
Postcode	
Date of Birth	

### **Level Applies for** - Please tick which level of payment you are applying for:

<b>Level 1</b> – Identified vulnerable students eligible for £1,200 bursary	
I am a student in care/care leaver (previously looked after for 13 weeks since the age of 14)	<input type="checkbox"/>
I am in receipt of Income Support or Universal Credit	<input type="checkbox"/>
I am in receipt of both Disability Living Allowance or Personal Independence Payments and Employment Support Allowance or Universal Credit	<input type="checkbox"/>

<b>Level 2</b> – Identified students eligible for a discretionary bursary of up to £800	
I am eligible or a sibling is eligible for Free School Meals	<input type="checkbox"/>
My total gross household income is less than £20,000	<input type="checkbox"/>
<b>Level 3</b> – Identified students eligible for a discretionary bursary of up to £400	
My total gross household income is more than £20,000 but less than £25,000	<input type="checkbox"/>

 <b>HOLYPORT COLLEGE</b>	16 to 19 Bursary Fund Policy	
	Effective Date: 07.11.19	Version No: v2.0

**Household Income** *(Required for Level 2 and Level 3 applications)*

Please include the required **original** supporting documentation with this form. All evidence will be photocopied and dealt with strictest confidence. *(Please do not send any original documentation in the post. The students should bring this directly to the Bursar who will photocopy and return ASAP).*

My total household income is:	£
-------------------------------	---


Please tick the supporting documentation provided

3 most recent Universal Credit monthly award statements P60 (tax year ended 5 <sup>th</sup> April 2020)	<input type="checkbox"/>
Last 3 months Payslips for all household adults	<input type="checkbox"/>
Evidence of self-employment income (tax year ended 5 <sup>th</sup> April 2020) or Accountants letter	<input type="checkbox"/>
Confirmation from our FSM checking system that the applicant or sibling is eligible	<input type="checkbox"/>
Other benefits/pension award letter	<input type="checkbox"/>

Discretionary Bursaries are awards made to students to help overcome the individual financial barriers to participating in education, for example to provide financial support towards:

What do you need financial assistance for?	How much will you need?
Travel	£
Books or school equipment	£
School meal vouchers	£
Educational/University Visits	£
Clothing	£
Specialist equipment	£
Other: pls specify	£
<b>Total Bursary Amount requested</b>	<b>£</b>

Please note that the College may choose to pay Bursary awards “in kind” e.g. by purchasing text books, school meal passes, travel passes or equipment or may make payments directly into the student’s bank account by BACS, in which case receipts will need to be provided.

 <b>HOLYPORT COLLEGE</b>	16 to 19 Bursary Fund Policy	
	Effective Date: 07.11.19	Version No: v2.0

**Payment Details**

Please note that the school may choose to pay Bursary awards “in kind” e.g. by purchasing text books, school meal passes, travel passes or equipment or may make payments directly into the student’s bank account by BACS, in which case receipts will need to be provided.

*Please complete the bank account details required.*

**Student Bank or Building Society details**

Full name of Account Holder <i>(This should be as it appears on your cash or debit card, or statement)</i>	
Name of Bank/Building Society	
Branch	
Sort Code	____ _ -- ____ _ -- ____ _
Account Number	____ _ ____ _ ____ _ ____ _ ____ _

*Your account number may not be the same as the cash or debit card number; you can find it on a bank or building society statement. Most account numbers are 8 digits long. If you are unsure your bank or building society can advise you.*

**Parent/Carer Declaration**


I certify that the information I have given on this application form is true and accurate.

I understand that the information given on this form may be shared with other departments within the school including the Finance Department.

I understand that if I withdraw from the school I may be liable to pay back all or some of the monies awarded to me.

Print Name	
Signature	

Date	
Relationship to student	

 <b>HOLYPORT COLLEGE</b>	16 to 19 Bursary Fund Policy	
	Effective Date: 07.11.19	Version No: v2.0

## Appendix C: Assessment Checklist 2020-21 - FOR OFFICE USE ONLY

### 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 (for example, books, bus pass, meal vouchers or equipment purchased on student's behalf) or BACS payment made. Receipts must be retained.
- Award letter issued to student confirming the amount of financial support, what support will be made in-kind and payment conditions

### Discretionary bursary


- Evidence to confirm the student meets the 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.**

 <b>HOLYPORT COLLEGE</b>	16 to 19 Bursary Fund Policy	
	Effective Date: 07.11.19	Version No: v2.0

Support awarded in kind (for example, books, bus pass, meal vouchers or equipment purchased on student’s behalf) or BACS payment made. Receipts must be retained.

Award letter issued to student confirming the amount of financial support, what support will be made in-kind and payment conditions

<b>Sixth Form Office use only</b>	
Date application received	
Date application reviewed	
Level / Amount of Bursary agreed	Level _____ Amount £ _____
Achievement Leader KS5 Signature	

 <b>HOLYPORT COLLEGE</b>	16 to 19 Bursary Fund Policy	
	Effective Date: 07.11.19	Version No: v2.0

## Appendix D

Example of a Universal Credit monthly award notice

<b>How your Universal Credit payments are worked out</b>	
This is based on your circumstances between 1 December 2018 and 31 December 2018	
<b>1. First, we bring together the basic parts of Universal Credit that apply to you.</b>	
Standard Allowance for you and your partner	£498.89
Housing Element	£354.68
Child Element	£508.75
From 06/04/2017 Universal Credit will only pay the child element for 2 children or qualifying young people unless certain exceptions apply. For further information on when an exception may apply, see <a href="http://www.gov.uk">www.gov.uk</a>	
Children on your claim XX XX	
We pay £277.08 for your first child or qualifying young person. For each other eligible child or qualifying young person, we pay £231.67	
ESFA note: there can be other/different elements in this section.	
<b>Amount</b>	<b>£1,362.62</b>
<b>2. Next, we take account of any non-work income and other benefits you receive as well as your savings and capital.</b>	
The total we take off for these items is:	£0.00
<b>3. We then take account of your take-home pay</b>	
Take-home pay is what's left after tax, National Insurance and any pension contributions have been deducted.	
Your take-home pay for this period is <b>£1,352.85</b>	
The first £192.00 of your take-home pay doesn't affect your Universal Credit monthly amount. Every £1.00 you earn in take-home pay over this £192.00 reduces your Universal Credit by 63 pence.	
	£731.34
The total we take off for take-home pay is:	£731.34
<b>4. Lastly, we take account of any loans, advances, deductions and overpayments or third party payments you have.</b>	
Social Fund	£22.15
Budgeting Allowance	£15.00
The total we take off for these items is:	£37.15
<b>Total adjustments</b>	<b>£768.49</b>
<b>Your Universal Credit monthly payment for this period</b>	<b>£593.83</b>

ESFA note: institutions should use the two highlighted figures, take-home pay and the amount of Universal Credit after deductions, when assessing household income.