

Bursary Policy

Reviewed	MEG
Committee to Review	Audit, Resources and Finance Committee
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16 to 19 Bursary Fund Policy 2023/24

Sixth form students at Taverham High School can apply for financial assistance to support them in overcoming individual financial barriers to participation in education.

What a bursary is for:

A bursary is money that students can use to pay for things like:

- clothing, books and other equipment for your course
- school meals
- transport and lunch on days you study or train
- cost of attendance at university open days / interviews / field trips

What you may be eligible for:

There are two types of 16 to 19 bursary, vulnerable student and discretionary. Please also refer to the eligibility criteria.

1. Vulnerable student bursary

You may be eligible for up to £1,200 per year if at least one of the following applies:

- you are in or recently left local authority care
- you are in receipt of Income Support, or Universal Credit because you are financially supporting yourself or financially supporting yourself and someone who is dependent on you and living with you such as a child or partner
- you are in receipt of Disability Living Allowance or Personal Independence Payments in your own right as well as Employment and Support Allowance or Universal Credit in your own right

If household income is below £40,000 students will be able to apply for a discretionary bursary *in addition* to the vulnerable bursary.

2. Discretionary bursary

You may be eligible for a discretionary bursary of between £900 and £2,775 per year if you need financial help. If your household income is below £30,000 per year you will automatically qualify for a bursary. The level of funding allocated to each student will depend on individual family circumstances and will be allocated on completion of an application form together with proof of eligibility (see below for further details). Receipt of bursary funding does not affect receipt of other means-tested benefits paid to families such as Universal Credit, Income Support, Jobseeker's Allowance, Child Benefit, Working Tax Credit and Housing Benefit.

How to apply

Application forms are available on the school website or from the sixth form office. All applications will be treated in the strictest confidence. The school receives a limited allocation which is managed at their own discretion but in accordance with guidelines laid down by the Education and Skills Funding Agency (ESFA).

Eligibility

To be eligible for the 16-19 Bursary Fund in the 2023 to 2024 academic year students must:

- be aged 16 or over but under 19 at 31 August 2023 *or*
- be aged 19 or over at 31 August 2023 and have an Education, Health and Care Plan (EHCP) *or*
- be aged 19 or over at 31 August 2023 and continuing on a study programme they began aged 16 to 18 ('19+ continuers')
- meet the residency criteria in [ESFA funding regulations](#) for post-16 provision 2023 to 2024

The 16 to 19 Bursary Fund provides financial support to help students overcome individual financial barriers to participation so that they can remain in education. The fund has two elements:

Vulnerable Bursary

Students who are in one or more of the groups below can apply for a vulnerable bursary of up to £1,200. The defined vulnerable groups are students who are:

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

Please note that students who meet the criteria for bursaries for vulnerable groups are not automatically entitled to a bursary if they do not have financial needs and/or their financial needs are covered from other sources, for example:

- a student attending specialist residential provision that covers their educational costs in full
- a student taking a distance learning programme who has no financial barriers to participation (for example, they don't have any travel costs or meal costs)
- a student in the care of the local authority whose educational costs are covered in full by the local authority
- a student who is financially supported by their partner

Appropriate confirmation from an authorised body of status will be requested and may come in the form of:

- 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 which looks after them or provides their leaving care services and could be a letter or an email, as long as it is clearly from the local authority
- for students in receipt of Income Support or Universal Credit, a copy of their Income Support or Universal Credit 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 Universal Credit, institutions must also see a tenancy agreement in the student's name, a child benefit receipt, children's birth certificates, utility bills etc
- for students receiving UC/ESA and Disability Living Allowance and Personal Independence Payments, a copy of their UC claim from DWP. UC claimants should be able to print off details of their award from their online account or provide a screenshot. Evidence of receipt of Disability Living Allowance or Personal Independence Payment must also be provided

Discretionary Bursary

Discretionary bursaries are awards made to students to help overcome the individual barriers to participation a student faces, for example help with the cost of transport, meals, books and equipment. The acceptance of requests for bursaries under this heading will be strictly subject to available funds and for the 2023/2024 academic year only. Applications will be assessed on a priority basis as follows :

1. Students eligible for free school meals or whose parents maintain a current NHS Tax Credit Exemption Certificate; Young Carers
2. Students whose household income is below £25,000 per annum **and** have 2 or more siblings in full time education
3. Students whose household income is below £22,500 per annum
4. Students whose household income is below £27,000 per annum
5. Students whose household income is below £30,000 per annum
6. Students who have been affected by a sudden exceptional change in circumstances

Appropriate supporting documentation providing evidence of **total household income** may take the form of **one** of the following:

- NHS tax exemption certificate
- tax credit documentation including Child Benefit notice*
- universal credit (UC) – 3 most recent monthly award statements*
- P60 alongside 3 most recent bank statements for all parents/carers in household
- certified letter from the DWP
- certified letter from the LA regarding free school meals
- employment support allowance
- other means-tested benefit
- self employment income evidence, for example
 - certified personal tax calculation
 - HMRC statement
 - annual tax summary
 - self assessment tax return
 - accountant's letter

* Please note that Child Benefit is included when calculating household income. Therefore, the most recent child benefit notice must also be provided if not part of tax credit documentation.

* Please be aware that when using a UC award notice, the total monthly income is calculated adding the take-home pay amount to the amount of UC after deductions.

Amounts payable are at Annex A

Discretionary bursary claims may be granted in part / full towards the following related areas:

- books and revision materials
- equipment related to the courses being followed e.g. art consumables or equipment
- direct transport costs
- educational and/or university trips/visits
- exam re-sit fees

These may also be paid 'in kind' i.e. payment with goods or services rather than cash, on proof of payment. In the case of books and/or equipment **the school reserves the right to request these be returned at the end of any course.**

The level of support which the school can offer is dependent on the total funding received from the Education and Skills Funding Agency (ESFA) and the number of applications received; therefore, reimbursement in part or full cannot be guaranteed throughout the year. Purchase decisions should be based on this understanding.

Payment conditions

Payments are made to the student's bank account. All payments from the fund will be conditional on students meeting the following criteria:

- providing necessary documentation
- meeting the expected minimum attendance rate 95%
- producing work in line with expectations
- meeting deadlines set by subject teachers
- meeting expected standards of behaviour

Purchases

All purchases for books, equipment and stationery using bursary funding must be undertaken by the school, so no upfront purchase is necessary. Please note the following:

- any purchase must be used to support the student's learning
- reimbursements to students who purchase their own equipment will only be made when the item has been approved by the sixth form office prior to purchase
- where applicable payments will be made by electronic BACS transfer to the student's bank account against appropriate evidence eg receipts or proof of purchase
- purchase requests may be refused where the cost for the purchase is deemed to be far greater than an equivalent item
- books and equipment purchased using bursary funding must be returned at the end of the study programme
- high value items, such as a laptop or photographic equipment, must be approved and purchased by the school, on the understanding they are returned at the end of the study programme
- students must complete a claim form for each purchase required
- a stationery 'starter pack' will be provided to each approved bursary applicant, comprising the most frequently requested items, using the applicant's bursary funding

Travel claims

Travel claims for single trips of more than 3 miles will be paid at 25p per mile, excluding the first 3 miles. For example, if the home to school distance is less than 3 miles, no payment will be made:

Home to school: 2.5 miles = £0

Home to school: 7 miles - total paid 4 miles @25 p = £1

Please note

The school reserves the right to seek the return of any funds, books and/or equipment purchased via the bursary e.g. cost of transport pass, photographic equipment, for a student who subsequently fails to attend or leaves the sixth form.

The school will maintain a record of all applications and awards including number, value, purpose, whether awarded or not, and brief justification.

Application process

On completion and assessment of a bursary application form, students will be notified of their eligibility. They will then be able to submit claims as appropriate throughout the academic year to be considered on an item by item basis in line with fund availability at the time of claim.

Appeals/complaints

If a student wishes to appeal against the decision made on a request for support, they are requested to follow the school's standard complaints procedure.

Policy review

This policy will be reviewed annually in line with the policy review timetable.

Annexe A – amounts payable

Priority 1: students eligible for Free School Meals or whose parents have a current NHS tax exemption certificate and Young Carers		
Meal allowance	£2.50 per day	£475 Added to cashless catering account **
Travel contribution (25p per mile if claiming petrol) *	£100 per half term	£600 BACS
Books & equipment	£700 per year	£700 BACS/internal transfer as applicable
100% of educational visit cost/university interviews	£1,000 per year	£1,000 BACS/internal transfer as applicable
		£2,775
Priority 2: students whose household income is below £22,500 per annum ***		
Meal allowance	£2.50 per day	£475 Added to cashless catering account **
Travel contribution (25p per mile if claiming petrol) *	£75 per half term	£450 BACS
Books & equipment	£600 per year	£600 BACS/internal transfer as applicable
100% of educational visit cost/university interviews	£1,000 per year	£1000 BACS/internal transfer as applicable
		£2,525
Priority 3: students whose household income is below £25,000 per annum and have 2 or more siblings in full time education ***		
Travel contribution (25p per mile if claiming petrol) *	£75 per half term	£450 BACS
Books & equipment	£600 per year	£600 BACS/internal transfer as applicable
100% of educational visit cost/university interviews	£1,000 per year	£1,000 BACS/internal transfer as applicable
		£2,050
Priority 4: students whose household income is below £27,000 per annum ***		
Books & equipment	£500 per year	£500 BACS/internal transfer as applicable
75% of educational visit cost/university interviews	£750 per year	£750 BACS/internal transfer as applicable
		£1,250

Priority 5: students whose household income is below £30,000 per annum ***		
Books & equipment	£400 per year	£400.00 BACS/internal transfer as applicable
50% of educational visit cost/university interviews	£500 per year	£500.00 BACS/internal transfer as applicable
		£900
Priority 6: students who have been affected by a sudden exceptional change in financial circumstances which will impact on their participation in education		
Allocations will be made on a case by case basis supported by a letter outlining individual household circumstances		
Vulnerable student bursary		
Meal allowance	£2.50 per day	£475.00 Added to cashless catering account **
Books & equipment/educational visit cost	£725 per year	£725.00 BACS/internal transfer as applicable
		£1200
Emergency Food		
In individual cases of severe hardship, the bursary can be used to provide food support for a student considered to be in real need, without undertaking the checks on household income or gathering other evidence that would normally be required. For audit purposes, the academy must retain a copy of:		
<ul style="list-style-type: none"> • a record of the number of students supported in this way • the number of days this support is given • the £ value of support given to each student along with the rationale for the food support • the signed confirmation of receipt of funding by the student, if actual spend receipts are not obtained 		
This arrangement will not continue on an ongoing basis for any individual student. This flexibility relates to food support only.		
The Business Manager and Head of Sixth Form will be responsible for making the decision if a student is facing severe financial hardship		

* Travel claims in the form of petrol refunds will be paid at 25p per mile for single journeys of more than 3 miles

** The meal allowance is added daily but does not accrue

*** In support of an application (priority 2-5 – except for young carers), for total household income evidence parents/carers will need to provide relevant documentation in the form of **one** of the following. Please note that Child Benefit is included when calculating household income. Therefore, the most recent child benefit notice must also be provided if not part of tax credit documentation.

- tax credit documentation
- universal credit – three most recent monthly award statements
- P60 alongside three most recent bank statements
- certified letter from the DWP
- employment support allowance
- other means-tested benefit
- self-employment income evidence