



HOLLY LODGE GIRLS' COLLEGE

16-19 Bursary Fund Policy

DOCUMENT STATUS

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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 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 2022 to 2023 academic year](#).

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 governing board

The governing board has overall responsibility for approving this 16 to 19 bursary fund policy. The governing board also has overall responsibility for monitoring the implementation of this policy.

4.2 The headteacher

The headteacher is responsible for ensuring staff are familiar with these 16 to 19 bursary fund policies, and that it is being applied consistently.

4.3 Staff

Our staff are responsible for implementing these 16 to 19 bursary fund policies consistently.

The senior leadership team will provide staff with appropriate training in relation to this policy and its implementation where appropriate.

4.4 Parents

Parents are expected to notify staff or the headteacher of any concerns or queries regarding these 16 to 19 bursary fund policies.

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 2 types of 16 to 19 bursaries:

Category 1 - Bursaries for defined vulnerable groups; and

Category 2- Discretionary bursaries

Category 3- Has an identifiable short term emergency need and does not fall into category 1 or 2

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

- Transport
- Books
- Equipment
- Field trips and other course-related costs
- The costs of attending university interviews and open days

- UCAS fees and travel expenses for Higher Education Visits

Please note this list is not exhaustive and cases may be considered on an individual basis

6. Eligibility criteria for the 16 to 19 bursaries

6.1 Age

To be eligible for either bursary in the 2023 to 2024 academic year, students must be at least 16 years old but under 19 years old on 31 August 2023.

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 the ESFA or by the 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 either 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](#).

6.4 Asylum seekers

Accompanied asylum seekers under 18 with an adult relative or partner and asylum seekers aged 18 and above are entitled to education but are not entitled to public funds. If necessary, they can apply to the Home Office for suitable housing and cash for essentials.

We will provide in-kind support such as books, equipment and a travel pass to asylum seekers who have not had asylum refused.

Unaccompanied asylum-seeking children:

- Are the responsibility of the local authority;
- Are to be treated as 'looked after' children; and
- Are eligible for a bursary for vulnerable groups, where they have a financial need

When these students reach 18 years old, we will consider their immigration status. They will still be eligible for a bursary as a student from a defined vulnerable group if the asylum claim is in their favour and will be treated as a 'care leaver' until they reach the upper age limit.

6.5 Bursaries for young people in defined vulnerable groups

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.

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

UC has now replaced IS, as well as other benefits above, for current and future young people aged 16 to 18. However, students aged 19 to 25 and funded from the 16 to 19 budget (19+ continuers and students with an EHC plan) may still receive the legacy benefits listed above.

Students who meet the criteria for a bursary for vulnerable groups are not automatically entitled to a bursary. Students will not receive the bursary if they do not have any actual financial need (for example, because their financial needs are met from other sources and/or because they have no relevant costs).

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, cases will be looked at individually and base the outcome based 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.

We can use our discretion, on a case-by-case basis, and provide more than £1,200 per year if such would be necessary in all the circumstances for the student to remain in education. Any such additional payment will be paid either from our discretionary bursary allocation or our own funds.

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.

We will provide this support for students from the bursary fund by making payments in kind where possible. It will not be provided it as regular payments for living costs.

6.6 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:

- Has a gross household annual income of less than £16190 [**documentary evidence required**]
- Are eligible for and claim free school meals

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.

In assessing any application for a discretionary bursary, we will consider:

- Level of household income
- Distance to travel between the student's home and the institution, or a location for a placement
- The number of dependent children in the student's household
- The requirements of their study programme
- Whether the student has additional responsibilities that may mean they need extra help
- Specific barriers to learning that the student may experience

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.

6.7 Evidence

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

- A copy of the UC or IS award notice, in the student's name
- Documents such as a tenancy agreement in the student's name, a child benefit receipt, birth certificate or utility bills
- Written confirmation of the student's current or previous looked-after status from the relevant local authority
- A copy of the UC claims from Department of Work and Pensions

7. Application and payment process

7.1 Applications

Applications should be submitted as soon as possible and within 4 weeks of the term starting, 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
- Payments by BACS transfer to the student's bank account for agreed expenditure to support learning.

7.3 Conditions for the receipt of bursary payments

Payments of the bursary are conditional on students meeting the following conditions in relation to their standards of attendance and behaviour:

- Attendance above a certain amount (e.g. 90%) [subject to exceptional circumstances]
- Following the sixth form code of conduct, and meeting behaviour targets.

All students are required to sign a declaration confirming that they agree to these conditions.

Students who fail to meet these conditions may have their payment withheld, but we will always take students' individual circumstances into consideration. This includes considering the impact on

attendance that might be caused by illness, caring responsibilities or other exceptional circumstances.

We will stop payments where students have been absent for a period of 4 continuous weeks or more (excluding holidays) and where students have decided to withdraw from a study programme.

We reserve the right to take back money from students where it is not spent for the reasons it was awarded.

We will consider the impact of such an action on the individual student before taking a final decision to do so, and any decision will be confirmed to the student in writing.

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, documents as evidence and any agreements signed by students) will be kept securely in line with our data protection policy, privacy notices and record retention schedule. These documents are available on our website.

10. Monitoring arrangements

This policy will be reviewed by the 6th form management team, together with the SBM annually. At every review, the policy will be approved the Governing body.



BURSARY FUND APPLICATION FORM 2023/24

This completed application form and relevant evidence must be handed in within 4 weeks of your start date. If the application form and evidence is presented later than that date, payments can only be backdated up to 4 weeks.

Please complete the form and bring it together with your supporting evidence on your first day.

Title:	Surname:	First Name:		
Address:				
Postcode:				
Phone/Mobile:				
Email Address:				
Date Of Birth: (DD/MM/YY)		Your age:		
Have you the right of abode and been resident in the UK for the last 3 years:		Yes		No
Bursary Criteria				
To qualify you must be aged 16 or over and under 19 on 31 August 2023 and meet the EFA's residency criteria. The bursary is paid to enable you to attend education with us and will only be paid if your attendance and behaviour meet the required standard.				
Please tick which category you are making your application under;				
Category 1 <i>Complete section A</i>		Category 2 <i>Complete section B</i>		Category 3 <i>Complete section B</i>
Section A				
Vulnerable Bursary Criteria - To qualify you must fall into one of the categories below and produce the required evidence as stated.				
Are you in receipt of Income Support or Universal Credit? (evidence required)		Yes		No
		-	-	-

- Income Support or Universal Credit Statement Letter)				
Care Leaver or Currently looked after in care? (evidence required – letter from Local Authority)	Yes		No	
Disabled student in receipt of both Employment Support Allowance and Disability Living Allowance/Personal Independence Payments (evidence required – financial statement showing both ESA and DLA/PIP)	Yes		No	

Information: Universal Credit and the 16 to 19 vulnerable bursary

Universal Credit will gradually replace Income Support and the Employment and Support Allowance, which are qualifying benefits for the vulnerable bursary. Universal Credit award notifications do not include any information on which benefits they have replaced. If you believe this applies to you, please provide us with the relevant documentation to support your Bursary claim.

Section B

Discretionary Bursary Criteria

Your household income is one of the criteria which will help us to assess your application. If your household income exceeds £16190 per annum, you will not be eligible for a cash bursary payment. However you may still be eligible for support under category 3

Please tick one of the following to show what type of evidence you have provided. If you cannot provide evidence then we cannot process your application for bursary payments.

P60		Income Support/Universal Credit (award letter)		Full TCAN notice	
Self-employed earnings (official tax return)		Other benefits/pension (award letter)		Wage slips (most recent wage slip)	
Number of dependent children living in the household					

The amount of financial assistance you will receive is dependent on your personal circumstances. It is intended to help you with the costs of overcoming any barriers you may have when attending learning. Using the table below, please tell us what you will need financial assistance for and how much you believe you will need for each **day** in learning. This information is strictly confidential and will only be used for this assessment purpose.

	How much will you need?	How many days?
Travel		
Meals: Breakfast		
Meals: Lunch		
Appropriate clothing		
Equipment		

Any Other[please provide any information that will support your application]		
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LEARNER DECLARATION

- I declare that the information on this form is true and accurate to the best of my knowledge. I have made this claim for a bursary payment, fully aware that any false statements can lead to withdrawal/refusal of any financial support and may lead to me being prosecuted.
- I understand that if I refuse to provide information which may be relevant to my claim, the application will not be accepted.
- I understand that monies I receive under the bursary scheme will be paid on condition of standards of attendance and behaviour, as agreed by the Director of Post 16 Studies

HOLIDAYS WILL BE UNPAID

- I will attend regularly and complete the course for which my bursary is supporting me. My attendance must be over 90% to qualify for a bursary.
- When changes to my household financial circumstances occur (which may result in changes to my claim), I confirm that I will notify school immediately.
- I will notify my provider immediately with any changes to my bank/building society details.
- I understand that any monies I receive under the bursary scheme have been awarded to provide me with financial support to allow me to continue in learning, and if I leave learning all financial support will stop.
- I understand that I do not have an automatic entitlement to bursary payments, and all payments are based on the information I have provided, **my attendance, behaviour and attainment.**
- I am clear that the bursary payments I receive are to provide me with the means to remain in learning and are to be used for items such as: books, equipment, travel costs, meals, additional costs, i.e. trips, miscellaneous course costs.
- I understand I have the right to appeal if I disagree with the outcome of my bursary application.

Applicant signature _____ Date _____

Parental signature _____ Date _____

FOR OFFICE USE ONLY

Eligibility – please tick appropriate box

Category 1 - Vulnerable Bursary		<ul style="list-style-type: none"> • are currently in care (as defined by Social Services); • are leaving or have recently left care; • are in receipt of Income Support in their own name; • are disabled and in receipt of both Employment Support Allowance or Universal Credit and Disability Living Allowance or Personal Independence Payments in their own right. 		
Category 2- Discretionary Bursary		<ul style="list-style-type: none"> • Has a gross household annual income of less than £16190 [documentary evidence required] • Are eligible for and claim free school meals 		
Category 3- Discretionary Bursary		<ul style="list-style-type: none"> • Has a gross household annual income of £16191- £25,000 [documentary evidence required] • Has an identifiable need and does not fall into category 1 or 2 		
Has agreed criteria been met?		Attendance	Behaviour	Attainment

Assistance Requested	Assistance Granted
Travel	
Meals	
Appropriate clothing to suit training and placement requirements	
Equipment	
Any other	
NOTE – Must fall within guide amounts	

Signed: _____ Date: _____

Name: _____ Position: _____