

## 16-19 Bursary and Discretionary Fund Policy

Date adopted: October 2016

Date to be reviewed: (reviewed annually)

### Purpose of the policy:

1. To ensure that the funds received annually from the EFA (Education Funding Agency) are targeted toward students that have the greatest need;
2. To ensure any remaining funds are distributed fairly to students whose household income may limit their educational chances;
3. To ensure financial sustainability through the flexible development of EFA funds received, thereby preventing an overspend in any annual cycle of funding;
4. To ensure that any personal financial details remain secure and confidential
5. To minimise the risk of fraudulent claims

### Government Bursary Fund:

A finite figure was devised by the EFA using an estimation figure of the number of students in 2009/10 who were eligible for the maximum EMA payment x £190. As such, Level One student's (defined below) were to receive an annual bursary of £1200 and the remainder was to be shared amongst other eligible Level Two students (defined below). In addition to this, a 5% administrative cost was to be applied and a discretionary hardship fund created. To provide for these latter costs, 15% was withheld from the grant and the annual bursary for Level Two students was calculated according to the formula:

Annual EFA grant minus 15% then minus (£1200 x no. of eligible Level One students) = remainder divided by number of eligible Level Two students (up to a maximum of £800). Eligible late applicants (due to changes in household circumstances) will be provided for through the 10% retained to support the discretionary hardship fund. The same formula is being used for 2016/2017 period.

The Student Bursary Support Service (SBSS) and will continue to administer the 16 to 19 Bursary Fund for vulnerable students on behalf of Education Funding Agency. The new online system aims to be easier to use, more responsive and accessible via most web-enabled devices (PC, smartphone, laptop or tablet).

### Universal Credit and the 16 to 19 vulnerable bursary

Universal Credit (UC) is being rolled out across the country. It will gradually replace Income Support and the Employment and Support Allowance, which are both qualifying benefits for the vulnerable bursary. You may soon start to see students claiming vulnerable bursaries based on receiving UC instead of these benefits. Universal Credit award notifications do not include any information about the benefits they replace, so you will not be able to tell from the document whether a student meets the Income Support or Employment and Support Allowance criteria. For the academic year beginning September 2016, you should ask any student claiming a vulnerable bursary based on a UC award to tell you which benefit it has replaced, so that you can

complete the SBSS claims form correctly. Those who say that their UC award is in place of Employment and Support Allowance must also be receiving Disability Living Allowance or its replacement, Personal Independence Payment. If the student is unsure why they have been awarded UC, treat it as a replacement for Income Support. You should then send the claim to the Student Bursary Support Service (SBSS) in the usual way. Funding claims for vulnerable students in the 2016 to 2017 academic year is being made online using the [SBSS portal](#). Institutions can submit vulnerable bursary funding claims for the 2016 to 2017 academic year from 1 August 2016. To reduce bureaucracy, we have stopped the annual voluntary MI collection. Data fields for the 16 to 19 Bursary Fund are included in the ILR and the school census, and we are encouraged to complete these fields so that records are generated about the take-up of the bursary.

## **16-19 Bursary Applications (with effect from September 2014)**

### **Eligibility:**

To receive a bursary, the student must be aged under 19 on 31 August in the academic year in which they start their programme of study and must satisfy DFE residency criteria.

The student must satisfy the following school conditions:

- 1) The student's level of attendance to lessons must be a minimum of 85%. If students achieve 93-100% attendance then they receive the full bursary, if they achieve 85-93% then their claim is reduced by 25%, if they achieve below 85% attendance, then the bursary is not awarded.
- 2) The student must not have broken the terms of the Sixth Form Contract (Learning Agreement)
- 3) The student must comply with the following bursary contract document extract:
  - (a) The school will check all claims for travel against the student's attendance record and he/she will not be refunded for any days he/she did not attend school for reasons other than illness. A parent/carer will contact the school on the first day of the student's absence and he/she will provide a note to explain the absence when he/she comes back in to school.
  - (b) Claims will be withheld if home learning or assignments are not up to date, until the work is completed.
  - (c) All claims must be submitted regularly.

### **Evidence requirement**

Evidence of household income by way of a P60, Universal Credit, Working Tax Credit annual statement from HMRC, Receipt of Benefit Notification, Tax Credit Award Notification or Self Employed Income Notification must be provided to the school Finance office along with the completed application form.

### **Level One: Guaranteed/Vulnerable Bursary**

Most students who get support from the bursary will receive a tailored award from the discretionary bursary. Students in one or more of the groups below need more support and can apply for a vulnerable bursary of up to £1,200. Institutions do not receive an allocation of funds for vulnerable bursaries. They need to draw down the funds from the Student Support Bursary Service (formerly the Learner Support Service), using the relevant claim form. The eligible groups are students who are:

- A student in care
- A care leaver

- Student in receipt of Income Support (IS) or Universal Credit (UC) in place of Income Support in their own right
- A student receiving Employment Support Allowance (ESA) and Disability Living Allowance (DLA) or Personal Independence Payments in their own right

### **Level Two: Discretionary Fund/Hardship Fund**

As an alternative to weekly payments, Lawnswood School will operate a discretionary payment system for specific educational purposes such as: books and equipment; transport, university application (UCAS fees); costs of travel to HE interviews; educational visits (including residential).

To be able to apply for this funding, students will have to prove that they meet some or all of the following criteria in the form of appropriate supporting documentation:

- That they or their parent(s) are in receipt of income support or other means tested benefits
- That they fulfil UK residency conditions
- That the total family income is less than £25,000 for the last financial tax year
- That they were eligible for free school meals last year

Students can either receive goods directly from school or be refunded for purchases made retrospectively (evidenced by a receipt). Eligibility will be determined via formal application. Each claim will be assessed separately.

### **Application Process and Payments**

All bursary fund applications are to be made to the Director of Sixth Form, along with the required evidence. In year applications would be subject to funds being available.

Lawnswood School will then process the information and will advise students, in writing, of the outcome. All eligible bursary payments will be attendance and achievement related and back dated to the start of the courses the student has enrolled upon.

Payments can be made directly to the student's bank account, by BACS. Payments will be subject to the conditions laid down in the 16-19 Bursary Contract, including attendance, behaviour, completion of coursework and completion of courses enrolled upon.

Once entitlement is approved, a separate 16-19 Bursary contract will be signed by the claimant and a copy kept with the Sixth Form team.

### **Security and Personal Information**

All applications will be made through Sixth Form. All personal information, including bank details and household earnings, will be stored securely and will remain strictly confidential.

### **Internal Appeals Process**

Students have a right to appeal against a decision if they have evidence that the school has made a mistake and that they have behaved in accordance with the terms of the 16-19 Bursary Fund contract. Appeals should be made to the Headteacher in the first instance. If a further appeal is to be requested then this will be heard by a Governors' subcommittee of two members including a school governor and a neutral member of staff.

### **Fraud**

Parent/Carer and student must confirm that all information provided is true and must notify Lawnswood School if any circumstances change. The bursary will be provided on the basis that certain conditions set by the school, as detailed in the bursary contract, will be adhered to. Parents and students will be required to jointly sign applications so that they understand that money may be claimed back and eligibility withdrawn should they knowingly provide information which is discovered to be false.

## BURSARY CONTRACT

between Lawnswood School Sixth Form and .....  
(name of student)

I understand that any claims I make from the Discretionary (Bursary) Fund are subject to me

- getting to school on time
- attending all my lessons
- making reasonable progress in all my subjects
- completing all home learning tasks to the best of my ability.

If I do not fulfil the conditions above, my claims may not be processed until sustained improvement has been observed.

I also understand that

- the school will check all claims for travel against my attendance record and I will not be refunded for any days I did not attend school for reasons other than illness. A parent/carer will contact the school on the first day of my absence and I will provide a note to explain my absence when I come back in to school.
- if I do not keep up to date with my home learning and/or assignments, the claims will be withheld until I catch up with work.
- I will submit all claims on a regular basis.

When I complete my courses I will

- return any books and IT equipment purchased through the Fund to the school. I understand that they are on loan and do not belong to me.

If any circumstances change that would prevent me from claiming the bursary fund, I confirm that I will notify school.

Signed: ..... Date: .....

Embed confidence; fuel ambition.

19 October 2016

Dear Parent/Carer

### **Bursary Application**

Thank you for your recent application to the 16-19 bursary fund. You have satisfied the government eligibility criteria. Attendance, behaviour and progress are all considered when each claim is made. If attendance drops below 95% in the current academic year, payments may be reduced or disallowed.

Unfortunately, as you can see from the attached attendance report, your son/daughter has a percentage below the required level. Therefore he/she will not be able to make claims until this level has improved. Attendance for bursary eligibility will be reviewed at the end of each half term. We will write to you again to let you know if claims would be allowed.

For your information, the bursary fund is provided to support those students needing financial assistance with the costs associated with their studies.

For example:

- Travel to and from school
- Food purchased in school (this may be in addition to free school meals)
- Equipment related to subject courses e.g. stationery, books and essential kit or materials
- Contributions towards the cost of field trips
- Costs associated with university open days
- Re-sit examination fees

Proof of purchase must be submitted with the claim for payment form. This may be weekly, or as and when purchases have been made, so please retain all receipts for this purpose. Payments will be made by Leeds City Council direct to student bank accounts and may take up to four weeks to process.

Please do not hesitate to contact the Sixth Form office on extension 260 if you have any questions.

Yours faithfully

Mrs D Hanson

Post 16 Leader – Year 12

enc: Individual Attendance Report  
Bursary guidelines for claims