



POST 16 BURSARY POLICY

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Approvals

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1 CONTEXT

To provide financial support to post 16 students who may be facing financial difficulty during their time at Accord Sixth Form College (part of Ossett Academy).

2 INTRODUCTION

The sixth form receives 16-19 Bursary Funding from the Government to support disadvantaged students. Its purpose is to provide financial support to help students overcome specific barriers to participation, so they can remain in education.

To be eligible for the bursary, students must:

- be aged 16 or over but under 19 at 31 August 2022; or
- be aged 19 or over at 31 August 2022 and have an Education, Health and Care Plan (EHCP); or
- be aged 19 or over at 31 August 2022 and continuing on a study programme they began aged 16 to 18 ('19+ continuers');
- meet the residency criteria in ESFA 2022 to 2023 academic year funding regulations for post-16 provision;
- be participating in provision that is subject to inspection by a public body which assures quality (such as Ofsted), the provision must also be either;
- funded directly by ESFA or by ESFA via a local authority; or
- funded or co-finance by the European Social Fund; or
- otherwise publicly funded and lead to a qualification (up to and including level 3) accredited by Ofqual or on the ESFA list of qualifications approved for funding 14 to 19; or
- a 16 to 19 traineeship programme.

There are 2 types of 16 to 19 bursaries - vulnerable and discretionary.

Vulnerable bursaries:

Paid up to £1,200 a year for students in one of the defined vulnerable groups.

Discretionary bursaries:

Awarded by the Academy to meet individual student needs, e.g. transport, meals, books and equipment.

Responsibilities of the Academy - Managing the bursary

The Academy has the following responsibilities set out by the ESFA with regards to the bursary funding. The Academy:

- must have a policy that sets out who is eligible to receive the discretionary bursary in their Academy and what the eligibility criteria are;
- must publicise the bursary and their policy so that students are aware of it and how to apply. Arrangements for applying should be straightforward and students should be reassured that they are confidential, so they are not put off by stigma;
- must assess each student who applies for the bursary and obtain evidence to back up each application;
- must retain evidence of the assessment (for 6 years) so that it is available if the Academy is audited by the ESFA. Evidence can be either recorded (e.g. on an eligibility checklist) or photocopied/scanned to prove eligibility.
- must claim vulnerable bursaries from the Student Bursary Support Service for each eligible student;
- must pay the bursary to students. Payments can be cash or in-kind (e.g. bus passes) and the Academy must retain records of these payments; and
- should set conditions for receiving the bursary, such as regular attendance, punctuality, good behaviour etc.

3 VULNERABLE BURSARY

The Vulnerable Bursary fund is administered by the Student Bursary Support Service (SBSS) on behalf of the ESFA. Claims, to a maximum of £1,200 per student, are made for vulnerable students via the SBSS

portal. The Academy does not receive an allocation of funds. To be eligible for the vulnerable bursary, students must be in one of the defined vulnerable groups:

- Young people in care;
- Young people who live independently having left Authority Care;
- Young people receiving Income Support, or Universal Credit;
- Young people in receipt of 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.

The Vulnerable Bursary is payable for each academic year the student is in education or training, as long as they continue to meet the eligibility criteria of the scheme. Students aged 19 or over are not eligible to receive vulnerable bursaries.

Responsibilities of the Academy – Vulnerable Bursaries

The Academy has the following responsibilities set out by the ESFA with regards to the Vulnerable Bursary funding:

- To assess if students are eligible to receive a Vulnerable Bursary payment.
- To pay a student more than £1,200 if they need extra help to remain in education. This should be paid from the discretionary bursary allocation, or from their own funds.
- To keep the following records to show what payments they have made from the bursary fund:
 - copy of the vulnerable claim form.
 - evidence showing that the student is eligible, e.g. letter from DWP or the local authority.
 - evidence of payment received from the SBSS, e.g. bank statements and remittance advice.
 - evidence of payments made to the student.

Payment

Payment is made at the end of every half term, in arrears, by BACS transfer providing that:

- the student has above 95% attendance each half term (note: the Academy has discretion to make exceptions to the 95% based on individual circumstances, all such instances must be authorised the Director of 6th form);
- students provide receipts, for items purchased through their bursary allocation, to the finance department each half term, prior to the next scheduled payment, as set out in the bursary award letter.
- all deadlines for both class work and homework are met; and
- all work produced by the student must be of an acceptable standard.

The bursary will not be paid to any student who has cause to be issued with a fixed term exclusion or have been permanently excluded.

There is no admin fee payable from the ESFA for processing vulnerable learner applications, however the Academy can deduct 5% of the relevant vulnerable learner bursary from the discretionary allocation to cover admin costs.

Recycling vulnerable bursary payments

The Academy may accrue unused Vulnerable Bursary, for example:

- if a student leaves early after only receiving part of their bursary,
- if the full amount is not paid to a student because they did not meet the agreed conditions.

Up to 30 April, the Academy is expected to recycle this funding and use it to offset against claims to the SBSS for other vulnerable students.

From 1 May, the Academy can recycle any vulnerable bursary funding claimed, but no longer required, into their discretionary bursary funding.

4 DISCRETIONARY BURSARIES

The Discretionary Bursary allocation is made annually by the ESFA, and awards are made by the Academy to individual students. The Academy can decide which students will receive a Discretionary Bursary and how much they will receive. However, bursary awards are targeted towards those young people who face the greatest financial barriers to participation and who cannot stay in education without financial help.

The level of award will vary dependent upon individual circumstances. The Academy must base all decisions about which students receive a discretionary bursary and how much bursary they receive on each student's individual circumstances and their actual financial need.

All Discretionary Bursaries are awarded by decision of the Bursary Panel which consists of the Director of Sixth Form, Post 16 Employment & Progression Manager, and the Chief Finance Officer. The decision of the Discretionary Panel is final and not subject to appeal.

Responsibilities of the Academy – Discretionary Bursaries

- Students that apply should be assessed individually and awarded a bursary based on their actual financial need.
- The assessment should be documented, and the evidence obtained to support the amounts being claimed should be retained for audit purposes.
- The Academy can set their own eligibility criteria for discretionary bursaries, but they must comply with the basic eligibility conditions of the scheme.
- The Academy must manage the number and size of discretionary bursary awards to keep within their budget. The Academy may decide to retain a small emergency fund from their discretionary allocation to be used to support students who experience exceptional circumstances during the academic year which impact on their ability to participate.
- The ESFA expects the Academy to spend no more than 5% of their total bursary allocation on administrative costs.
- The Academy should ensure that information about bursary funding – whether printed or on their websites - is kept up to date.
- The Academy should publish a statement setting out how they will use their bursary fund. The statement should be published early enough for students to be able to use the information when deciding which post-16 institution to attend. The Academy's eligibility criteria must be clear and available to students and to the ESFA. The statement should clearly set out what type of help is being offered, for example, help with transport, books and equipment, field trips and other course-related costs and whether bursary support is available to contribute to the costs of attending university interviews and open days.

Setting eligibility criteria

The Academy must ensure that bursary funding reaches those students who are most in need of financial support. As such household income is the primary factor in deciding who should get Discretionary Bursaries, this can be used in conjunction with other factors (e.g. distance to travel, family circumstances).

The current eligibility criteria used for claims is based on students whose family income is less than £22k.

There are no limits set for the amount of discretionary payment that can be awarded to students who need support from the bursary.

The Academy should ensure that the bursary fund eligibility criteria are applied correctly to all students. All claims must be submitted to the Bursary Panel for approval.

Raising awareness of the 16 to 19 Bursary Fund

The Academy should publish a statement setting out how they will use their bursary fund. This should be done early enough for students to be able to use the information when making decisions about their post 16 education.

The eligibility criteria must be clear, and available to students and the ESFA. The Academy must make sure that information, both printed and on the website, is kept up to date. All students will also receive a letter explaining the conditions and process of the bursary fund as part of the welcome pack sent to students.

All claimants will be notified of the decision relating to their claim when the Bursary Panel has completed its review. If a student is awarded a bursary, the amount of bursary, conditions of payment (see below), and payment dates will be communicated to the student as soon as this information is available.

Payment

Payment is made at the end of every half term as per the payment schedule in the bursary award letter, by BACS transfer providing that:

- the student has above 95% attendance each half term (note: the Academy has discretion to make exceptions to the 95% based on individual circumstances, all such instances must be authorised the Director of 6th form);
- students provide receipts, for items purchased through their bursary allocation, to the finance department each half term, prior to the next scheduled payment, as set out in the bursary award letter.
- all deadlines for both class work and homework are met; and
- all work produced by the student must be of an acceptable standard.

The Academy should ensure that it has evidence that a student has seen and agreed to the conditions. This might be an agreement signed by the student or a signed declaration which forms part of the Academy's bursary application form. Copies of this evidence should be retained for audit.

The Academy reserves the right to request receipts from students to verify that the bursary has been spent in line with the purpose of overcoming barriers to participation.

The bursary will not be paid to any student who has cause to be issued with a fixed term exclusion or have been permanently excluded.

The Academy should not make blanket or flat rate payments to all students. However, if it is considered that the needs of all claimants are equal, then this can be done at the discretion of the Bursary Panel. Any additional bursary payment required later in the year, over and above the flat rate payment, can be allocated from the remaining emergency fund at the discretion of the Bursary Panel.

The Academy should keep the following records to show what payments they have made from the bursary fund:

- copies of evidence used to assess entitlement, such as, letter from DWP, or evidence of household income.
- a copy of the student's individual assessment of actual financial need.
- receipts for purchases made, e.g. bus pass, lunch receipts or book receipts.

The Academy is permitted to use up to 5% of their allocation for administrative costs

Underspend

Any underspend can be rolled forward and used within the discretionary allocation for the next academic year. Rolled forward funds must be spent before the Academy uses their allocated discretionary funds for the next academic year. Any underspends rolled forward to the next academic year must only be spent on

participation costs for students assessed as eligible for support from the bursary fund. Any underspend cannot be carried forward for more than one year.

5 FREE SCHOOL MEALS

Academies that receive allocations for both free meals in further education and the 16 to 19 Bursary Fund discretionary bursary have flexibility to use the funding as a single allocation.

Institutions must manage the single allocation appropriately to ensure all students eligible for a free meal receive one (including when they are attending a work placement) in line with the free meals guide.

Prior to the introduction of additional funding for free meals, institutions had supported the cost of meals for students who needed them from discretionary bursaries. ESFA adjusts discretionary allocations to take account of this double funding for those institutions also in receipt of an allocation for free meals.

Where students are eligible for a free meal, institutions should ensure they consider the provision of a free meal, or the funding provided to the student for the free meal, when they assess their overall need for support, whether from the discretionary bursary or bursaries for vulnerable groups.

Responsibilities of the Academy – Free Meals

- To ensure that students are aware of the eligibility criteria for free meals.
- To clearly set out their free meal provision for students and parents.
- To maintain accurate and up to date records that evidence which students receive free meals funding.
- To confirm student eligibility for funding and demonstrate appropriate use of funds
- To decide what evidence is accepted for free meals and how recent it is.

Free meals in further education is an entitlement for those students who meet the following eligibility criteria:

Age eligibility

- A student must be aged 16 or over but under 19 on 31 August 2022.
- Students aged 19 or over are only eligible to receive a free meal if they are continuing on a study programme they began aged 16 to 18 ('19+ continuers') or have an Education, Health and Care Plan (EHCP).

The following groups of students are not eligible for free meals in further education:

- students aged between 14 and 16 (these students are already covered by free school meals (FSM) provision)
- students aged 19 or over at the start of their study programme, unless they have an EHCP or are a 19+ continuer
- apprentices, including those with an EHCP.

Eligible benefits

Free meals are targeted at disadvantaged students. Free meals in further education defines disadvantage as students being in receipt of, or having parents who are in receipt of, one or more of the following benefits:

- income Support
- income-based Jobseekers Allowance
- income-related Employment and Support Allowance (ESA)
- support under part VI of the Immigration and Asylum Act 1999
- the guarantee element of State Pension Credit
- Child Tax Credit (provided they are not entitled to Working Tax Credit and have an annual gross income of no more than £16,190, as assessed by Her Majesty's Revenue and Customs (HMRC))
- Working Tax Credit run-on – paid for 4 weeks after someone stops qualifying for Working Tax Credit
- Universal Credit with net earnings not exceeding the equivalent of £7,400 pa

A student is only eligible to receive a free meal when they, or a responsible adult on their behalf, have made a successful application to the institution where they are enrolled. Students must also satisfy the residency criteria set out in [16 to 19 education: funding guidance - GOV.UK \(www.gov.uk\)](https://www.gov.uk/guidance/16-to-19-education-funding-guidance) .

The Academy must ensure they manage the single allocation appropriately to ensure all eligible students who successfully apply for free meals in further education are provided with one in line with the free meals guide. The funding rate of £2.41 remains the same in the 2022 to 2023 academic year. If the Academy wishes to enhance the rate to provide a meal with a greater value, they have the discretion to do so.

The Academy can give additional support to students who are eligible for a free meal from the Bursary Fund, if they assess they meet the criteria for a defined vulnerable group bursary or that they are facing significant financial barriers to participation and require support from the discretionary bursary.