



16-19 Bursary Fund Policy

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1.0 Introduction

QEGSMAT (the Trust) provides financial support to eligible students from the 16-19 bursary fund, which it receives from the Education and Skills Funding Agency (ESFA). 16-19 bursaries are provided to students to help them overcome specific financial barriers to remaining in education.

This policy:

- Sets out the Trust's clear and transparent processes for the use and allocation of its 16-19 bursary funds;
- Makes clear to students and parents/carers the type of financial support available from the Trust and how to apply for it; and
- Makes clear to students and parents/carers the Trust's attendance and behaviour conditions for receiving the funds.

2.0 Guidance

This policy is based on advice from the Education and Skills Funding Agency (ESFA) on the 16-19 bursary fund for the 2023/24 academic year.

3.0 Definitions

In care: 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: A child in the care of a Local Authority or who is provided with accommodation by a Local Authority in the exercise of any functions for more than 24 hours (section 22 of the Children Act 1989).

Care leaver: 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.

4.0 Roles and Responsibilities

The Board of Trustees

The Board of Trustees has overall responsibility for the 16-19 bursary eligibility criteria and the conditions for receiving a bursary. The Board is also responsible for approving this policy and monitoring its implementation across the Trust.

The Headteacher

Implementation of this 16-19 Bursary Fund Policy is delegated to the Headteacher. The Headteacher is responsible for ensuring the policy is applied consistently in their school, and that their staff are familiar with its content.

Staff

The staff are required to implement this 16-19 Bursary Fund Policy consistently in their school. The Headteacher will provide the staff with appropriate training in relation to this policy and its implementation.

Students and Parents/Carers

Students and parents/carers are expected to notify their Headteacher of any concerns or queries regarding this 16-19 Bursary Fund Policy, and of any changes in circumstances that may affect their eligibility for a bursary.

5.0 How the Trust Uses the Bursary Fund

The bursary fund is intended to support students aged 16 to 19 to overcome specific financial barriers to participation so they can remain in education.

The Trust uses the fund to help students meet the cost of:

- Transport;
- Books;
- Equipment;
- Field trips and other course-related costs; and
- Attending interviews including university interviews and open days.

There are two types of 16-19 bursary:

- Bursaries for defined vulnerable groups; and
- Discretionary bursaries.

6.0 Eligibility Criteria

The following criteria will be used to assess a student's eligibility for a bursary. **In addition**, the Trust will **also** consider the student's actual financial needs, after carrying out a full assessment. ***Please note, no amount of funding will be awarded without a full assessment of the student's actual financial needs.***

6.1 Age

To be eligible for a bursary in the 2023/24 academic year, students must be at least 16 years old but under 19 years old on 31st August 2023.

Students aged 19 or over are eligible for a discretionary bursary only if they:

- Are continuing on a study programme or course they began when they were 16-18 years old; or
- Have an Education, Health and Care Plan (EHCP).

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 16-19 study programme at a school in the Trust, the Trust may use its 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 (such as 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 14-19; or
- Be a 16-19 traineeship programme.

Non-employed students aged 16-19 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 type of 16-19 bursary but are likely to require financial help on a less frequent basis (for example, when travelling to exams). In this event, the Trust will provide support in kind, such as a travel pass, and shall decide on the details 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.

The Trust 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;
- To be treated as 'looked after' children; and
- Eligible for a bursary for vulnerable groups, where they have financial need.

When these students reach 18-years-old, their migration status will be considered. 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 Students in Defined Vulnerable Groups

Students with a financial need who meet one of the following criteria, in addition to the criteria outlined in sections 6.1, 6.2 and 6.3, can apply for a bursary for vulnerable groups.

The defined vulnerable groups are students who are:

- In care (note, 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 a dependent 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.

Please note: UC has now replaced IS, as well as the other benefits mentioned above, for current and future young people aged 16-18. However, students aged 19-25 and funded from the 16-19 budget (students aged 19+ continuing on a study programme or course they began when aged 16-18, and students with an EHCP) may still receive the legacy benefits mentioned.

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 have no actual financial needs (for example, because their financial needs are met via alternative means and/or because they have no relevant costs).

Where a bursary is provided, the funds will generally be up to £1,200 per annum for study programmes lasting 30 weeks or more. When calculating the amount, cases will be looked at individually and the outcome based on the needs of the student. Students will only receive the amount they actually need to participate. They will not automatically receive £1,200.

The Trust will exercise discretion, on a case-by-case basis, and provide more than £1,200 per annum if necessary for a student to remain in education. Any such additional payment will be made from either the discretionary bursary or from the relevant school's own funds.

If a student's study programme lasts for less than 30 weeks, they will be paid a pro-rata amount. The Trust will also consider the number of hours involved in a student's study programme when deciding whether a pro-rata payment is more appropriate.

The Trust will review the student's eligibility for a bursary for vulnerable groups each academic year. Students will only continue to receive a bursary for vulnerable groups if they continue to satisfy the criteria.

The Trust will provide support for students from the bursary fund by making payments in kind where possible. Regular payments for living costs will not be provided.

6.6 Discretionary Bursaries

In addition to the criteria outlined in sections 6.1, 6.2 and 6.3, students can apply for a discretionary bursary if they satisfy one or more of the following criteria:

- Students who live in a household with a total income of less than £33,000 per annum;
- Students who live in a single parent household or have one or more dependant siblings living in their household;
- Students who are young carers or parents (or have other additional responsibilities); and/or
- Students who travel more than eight miles to the institution.

Students who do not satisfy any of the above criteria, but who are able to demonstrate financial hardship arising from other reasons, may also apply for a discretionary bursary.

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

- The student's household income;
- The distance the student travels between home and the institution (or the location of a placement);
- The number of dependent children living in the student's household;
- The requirements of the student's study programme; and
- Whether the student has additional responsibilities which may mean they need extra help.

There is no set limit for the amount of discretionary bursary that can be awarded to students. The Trust will determine which students receive a discretionary bursary, and how much they receive on a case-by-case basis, taking into consideration the student's individual circumstances and their actual financial needs.

The Trust will review the student's eligibility for a discretionary bursary each academic year. Students will only continue to receive a discretionary bursary if they continue to satisfy the criteria.

6.7 Evidence

All 16-19 bursary applications must be supported by appropriate evidence, such as:

- 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; and
- A copy of the UC claim from the Department for Work and Pensions.

7.0 Application and Payment Process

7.1 Applications

Applications should ideally be submitted by 31st July each academic year to allow enough time for the Trust to assess the overall demand and make discretionary awards on a fair basis. This date will be clearly stated on the application form.

However, the Trust acknowledges that students' circumstances may change and therefore the application process will remain open throughout the academic year.

Applicants will be informed in writing (either via email or 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 Trust's Complaints Procedure, available on the website, www.qegsmat.com.

7.2 Payment Process

Payments will be paid in-kind rather than in cash. This may include, for example, travel passes, books, equipment, vouchers for meals or clothing.

7.3 Conditions for Receiving Bursary Funding

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

- Attendance of at least 95% at timetabled lessons, unless the absence is authorised;
- Students who are absent due to sickness must present a note from a qualified medical practitioner if their absence is longer than five school days;
- Holidays outside timetabled school holiday times are not permitted; and
- Students in receipt of bursaries will be expected to abide by the Trust's Behaviour Policy, available on the website, www.qegsmat.com.

All students are required to sign a declaration confirming they agree to these conditions. A copy of the signed declaration will be retained by the school for audit purposes.

Students who fail to meet these conditions may have their bursary withheld. However, the Trust will always take the individual circumstances of students into consideration. This includes considering the impact on attendance of illness, caring responsibilities or other exceptional circumstances.

Students will cease to be eligible for a bursary where they have been absent for a period of four continuous weeks or more (excluding school holiday periods) and where they have decided to withdraw from a study programme.

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

The Trust may also specify that students return any books and equipment at the end of their study programme for use by other students. This will be clearly communicated to students and their parents/carers upon confirming eligibility of the bursary.

8.0 Changes in Circumstances

Students and parent/carers are required to notify the school without delay of any changes in circumstances that may affect their eligibility for a bursary.

9.0 Record Keeping

Any paperwork and documents retained by the school for audit purposes will be kept securely in line with the Trust's Data Protection Policy, privacy notices and record retention schedule. These are available on the Trust's website, www.qegsmat.com.

10. Unspent Funds

The Trust cannot carry forward any discretionary bursary funding for more than one year. Unspent funding must be reported to the ESFA using the [online enquiry form](#), specifying the amount of funding and the year(s) it relates to, no later than 31st March each year. The ESFA will recover any unspent funds.

11.0 Monitoring Arrangements

This policy will be reviewed annually. At every review, the policy will be approved by the Board of Trustees.

Appendix 1

16-19 Bursary Fund Application – 2023/24 Academic Year

Please complete this form if you are a student applying for a 16-19 bursary. The information will be used to assess which bursary, if any, you are eligible for – either a bursary for defined vulnerable groups or a discretionary bursary.

You and your parent/carer will be required to sign a declaration to indicate that the information given in the form is both current and correct.

ALL INFORMATION PROVIDED WILL BE TREATED IN THE STRICTEST CONFIDENCE

You may be eligible for a 16-19 bursary if you are undertaking a full-time programme of study in the academic year 2023/24 and were under 19 years old on 31 August 2023.

If you are over the age of 19, you may be eligible for a discretionary bursary if you are completing a study programme you began when aged between 16-18, or if you have an EHCP.

SECTION 1 – Personal Information

First name:		Surname:		Form:	
Date of birth:		Age on 31 st Aug 2023:		Years	Months
Address: <i>Inc.</i> <i>postcode</i>					
Home phone no:		Mobile no:			
Email address:					

SECTION 2 – Your Courses

Please list the courses you are enrolled on.

1		2	
3		4	
5		6	

SECTION 3 – Your Household

	Parent/Carer 1	Parent/Carer 2
Surname:		
First name:		
Relationship to student:		
Home address:		
Home phone no:		
Mobile no:		
Email address:		

SECTION 4 – Bursaries for Vulnerable Groups

Please complete this section **only** if you think you may be eligible for a bursary for vulnerable groups of up to £1,200.

If you satisfy one or more of the below criteria, you **may** be eligible for a bursary for vulnerable groups. Please note, even if you meet the criteria, you are not automatically entitled to a bursary. Applications are considered on a case-by-case basis and a full assessment of your financial needs will be carried out first. You will not receive the bursary if you have no actual financial needs (because they are met from via alternative means and/or you have no relevant costs), or you may be offered a reduced allowance.

Please tick all that apply.

I am a student in care	
I am a student who is a care leaver	
I am a student who receives either Income Support (IS) or Universal Credit (UC)	
I am student who receives: <ul style="list-style-type: none"> • Disability Living Allowance (DLA) or Personal Independence Payments (PIP); and either • Employment and Support Allowance (ESA) or UC 	

SECTION 5 – Discretionary Bursaries

You **may** be eligible for a discretionary bursary if you satisfy one or more of the below criteria.

Please tick all that apply.

I am a student who lives in a household with a total income of less than £33,000 per annum	
I am a student who lives in a single parent household or have one or more dependent siblings living in my household	
I am a student who is a young carer or parent (or have other additional responsibilities)	
I travel more than 8 miles to school	

SECTION 6 - Proof of Income

This section must be completed by you, the student, if you live independently. However, if you are dependent on your parent(s)/carer(s), they must complete this section of your application.

In order that your application for a 16-19 bursary can be fully assessed, evidence of your circumstances is required. Information about what to submit in support of your application can be found in the table below. Please place a tick in the 'Copy Attached' column to indicate what information you have provided.

What is your annual gross household income?		£
Source of Income	Supporting Evidence Required	Copy Attached
Annual salary	P60 for 2022/23 or payslip for the month of March 2023 or payslip for the last week of March 2023 or Working Tax Credit Award Notice marked 2022/23	
Income Support or Universal Credit	Entitlement / Award letter – dated within the last 3 months	
Employment and Support Allowance	Entitlement / Award letter – dated within the last 3 months	
Disability Living Allowance or Personal Independence Payments	Entitlement / Award letter – dated within the last 3 months	
Job Seekers Allowance	Entitlement / Award letter – dated within the last 3 months	
Support under part VI of the Immigration and Asylum Act 1999	Entitlement / Award letter – dated within the last 3 months	
Guarantee element of state pension credit	Entitlement / Award letter – dated within the last 3 months	
Child Tax Credit	Entitlement / Award letter – dated within the last 3 months	
Working Tax Credit Run-On	Entitlement / Award letter – dated within the last 3 months	
Any other benefit	Entitlement / Award letter – dated within the last 3 months	
Grants or bursaries	Relevant paperwork detailing entitlement and amount paid	
Any other income	Relevant paperwork	

SECTION 7 – Declaration

Please read the declaration below carefully before signing:

1. I/We declare that the statements made on this form are true and to the best of my/our knowledge and belief are correct in every respect. I/We undertake to supply any additional information that may be required to support this application. I/We understand that if I/we refuse to provide information relevant to this claim the application will not be accepted. I/We also undertake to tell the school of any change in circumstances in writing. I/We agree to repay the school in full and immediately any sums advanced if the information I/We have given is shown to be false or deliberately misleading.

2. I/We am/are aware that the funding covers only this school year and that I/we must re-apply next year. I/We am/are aware there is no guarantee that funding will be received again in future years, even if it is received in the current year.

Signed: <i>(Student)</i>		Date:	
Signed: <i>(Parent/Guardian 1 named above:</i>		Date:	
Signed: <i>(Parent/Guardian 2 named above)</i>		Date:	

Please submit this form to your Head of 6th Form. All payments are dependent upon the agreed terms regarding attendance, punctuality and compliance with all general school rules and the maintenance of a standard of academic work which is in line with the targets set by the school.

<i>For School use only:</i>	
<i>Date Received:</i>	
<i>Bursary Approved: Yes or No</i>	<i>Guaranteed Award or Discretionary Award</i>
<i>Authorised By:</i>	<i>Date:</i>
<i>Amount of Award:</i>	<i>Date letter/bank details form issued:</i>
<i>Additional Notes:</i>	