

Post 16 Students Bursary Fund Policy

Designated Teacher: Director of Finance and Facilities

Reviewed by: Governors Policy Committee

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Contents:

Background

Eligibility

The claims process

What can Students claim for?

Staff roles and responsibilities

- The Student
- Bursars Office
- Post 16 Team
- Senior Leadership Team (SLT)
- Governing Body (GB)

Appeals

Quality Assurance

GORSE Academies Trust

Annexes:

Annex A Financial Assessment Form

Annex B Appeals Form

POST 16 STUDENTS BURSARY FUND POLICY

1. INTRODUCTION

- 1.1. This policy outlines the provision and management of the Bursary Fund for Post 16 Students. It is underpinned by the Education Funding Agency 16-19 Bursary Fund Guidance and the statutory duties within the Equalities Act 2010 and the Data Protection Act 1998.

2. BACKGROUND

- 2.1. As of September 2011 Educational Maintenance Allowance (EMA) ceased to exist. A new system was introduced known as The 16-19 Bursary Fund, designed to eliminate the gap in attainment between those from poorer and more affluent backgrounds, and to ensure every young person participates in and benefits from a place in 16-19 education and training.
- 2.2. As a provider, The GORSE Academies Trust will use its discretion to make Awards to young people in ways that best fit the needs and circumstances of its Students. Awards will be granted in order to ensure that the amount enables the Student to participate fully in their chosen course, either due to financial difficulties or in order to cover course related costs, where those costs have been identified as a specific barrier to participating in educational activities.

3. ELIGIBILITY

- 3.1. Special Bursaries of £1200 a year will be available for vulnerable Students who are:
- young people in care or care leavers,
 - young people in receipt of income support and
 - disabled young people in receipt of employment support allowance who are also in receipt of disability living allowance.
- 3.2. All Students in Years 12-13 with a household income of less than £25,000 are eligible to apply for a Discretionary Bursary.
- 3.3. Applications outside of the above criteria *may* be considered in **exceptional** circumstances and for a specific educational purpose.
- 3.4. Students will be required to have a 90% record of attendance and an effort grade of at least 'Good', unless there are exceptional circumstances which are supported by the Post 16 Team in order for a Discretionary Bursary to be awarded.

4. THE CLAIMS PROCESS

- 4.1. Students who wish to apply for a Bursary are required to submit a Financial Assessment Form (*Annex A*).

- 4.2. If the Students assessment form meets the eligibility criteria and an Award is granted, the Student will then be able to receive a minimum of £100 paid each term in order to support them with their continuing education. Claims will be paid in September, January and April directly into the Students bank account. It will not be possible for Students to 'roll over' their allowance from one term to the next. Funding amounts per term may vary depending upon the number of successful Awards granted.
- 4.3. A Bursary is only paid over a single year. Students who are enrolled on a two year course will have to apply each academic year if they wish to receive a Bursary Fund for the duration of their course. Applications may also be considered from Students whereby their circumstances have changed during the year. A previous successful application does not guarantee that an application will be successful in Year 2 as there may have been a change in circumstances which would affect the application.
- 4.4. The last date for claim forms to be submitted will be by the last day of October in term 1, last day of January in term 2 and the last day of April in term 3.
- 4.5. Payments for late applications will be backdated to the start of the term in which they were applied for.
- 4.6. Bursary Awards are made conditionally on the understanding that the Student adheres to the expectations of the School.

5. WHAT STUDENTS CAN CLAIM FOR?

- 5.1. This list is not exhaustive and provides examples of how Students may use their Bursary in order to meet their individual needs
- Books and equipment
 - Fees and examination re-sits
 - Transport costs to and from their place of education
 - Emergency accommodation and meals
 - Course trips
 - Attending interviews and Open Days
 - Other Educational Resource e.g. laptop/ tablet
- 5.2. All sensible, educationally linked requests will be considered. Where appropriate, payments can also be made 'in kind' e.g. travel passes or food vouchers.
- 5.3. Payments are not intended to subsidise social activities. Similarly they should not be used where the Student may be eligible for alternative financial support e.g. childcare payments.

6. ROLES AND RESPONSIBILITIES

6.1. The Student

- 6.1.1. To use the Bursary for educational purposes only
- 6.1.2. To adhere to the attendance and behaviour expectations of the School
- 6.1.3. To inform the Bursars Office in writing of any changes in their circumstances if they no longer meet the eligibility criteria for funding.
- 6.1.4. To repay the School **in full and immediately** any monies advanced to them if they are found to have supplied false or deliberately misleading information in order to secure an Award.

6.2. The Bursars Office

- 6.2.1. Administer the 'Financial Assessment Form'
- 6.2.2. Liaise with the Post 16 Team to provide information on which Students are eligible for the 16-19 Bursary Fund
- 6.2.3. Collect and securely store information regarding Students Bank details
- 6.2.4. Collect and securely store information regarding parents/ carers financial status
- 6.2.5. Administer Termly payments to Students to successful Bursary Fund applicants
- 6.2.6. Complete a 5% sample check of approved applications in the Summer Term as part of the Quality Assurance process

6.3. The Post 16 Team

- 6.3.1. To advertise the scheme to Students
- 6.3.2. To provide Students with Financial Assessment Forms
- 6.3.3. Liaise with the Bursars Office to provide information on Students Attendance and standards of behaviour
- 6.3.4. To inform Students on the outcome of their application
- 6.3.5. To inform the SLT of likely appeals.
- 6.3.6. To liaise with the Bursars Office to ensure that payments are made correctly and on time.

6.4. The Senior Leadership Team

- 6.4.1. To consider Stage 1 appeals and give a decision.

6.5. The Governing Body

- 6.5.1. To consider Stage 2 appeals and give a final decision.

7. APPEALS

- 7.1. Due to the nature of the Bursary Fund some Students may be unhappy with the decisions made by the Bursar's office (decision on financial eligibility). There is, therefore, an Appeals procedure in place.
- 7.2. Students who wish to challenge the outcome of their application can do so by completing an Appeals Form (*Annex B*) outlining why they dispute the decision and may provide further evidence to support their application. This should be submitted within 14 days of the initial decision being received.

7.3. Stage 1 Appeal - Senior Leadership Team

- 7.3.1. The Senior Leadership Team will then consider the appeal and give a decision.

7.4. Stage 2 Appeal - Governing Body

- 7.4.1. Should applicants be unhappy with the decisions made by SLT they will have the right to refer their appeal to the Governing Body. **The Governors' decisions are final.**

8. QUALITY ASSURANCE

- 8.1. In the summer term, the Bursars Office will complete a 5% sample check of applications approved in that year prior to the final instalment of monies being paid.
- 8.2. The Financial Director will decide whether cases require Awards to be recouped.

Bursary Fund Financial Assessment Form

Student details:

Surname/ Family name							
First name(s)							
Sex	male				female		
DOB (dd/mm/yyyy)							
Age as of 31 st August*	16		17		18		

* Student must be aged 16, 17 or 18 on the 31st August to apply

Address details:

Home Address	
Postcode	
Home telephone no	
Mobile telephone no	
Email address	

School/ College Details:

Name of School/ College							
School/ College Address							
Postcode							

Student Bank/ Building Society account details*:

Full name of Account holder							
Name of Bank/ Building Society							
Branch							
Sort Code							
Account Number							

* This should be the name as it appears on your cash/ debit card or bank statement

Course details:

Course title				
Attendance requirement	Full time		Part time	
No of guided learning hours (glh) per week				

Type of Bursary being applied for:

Special Bursary (£1200)	
Discretionary Bursary	

What do you intend to spend your Bursary Fund Award on?

	Tick as appropriate
Books and equipment	
Fees. Examination Re-sits	
Transport costs to and from the school/ college	
Emergency accommodation and meals	
Course trips	
Interviews and Open Days at Colleges/ Universities	
Stationery	
Other Educational resources Please specify:	

Free School Meals:

Are you and/ or your siblings eligible for free school meals?	Yes		No	
Siblings name(s)				

Financial Assessment

The following sections are to be completed by the person(s) responsible for the household bills

Parent/ Carer details:

	Person 1	Person 2
Surname/ Family name		
First name(s)		
Relationship to Student		
Home telephone no		
Mobile telephone no		

Income:

Are you employed? ***If yes, please submit P60 for details or if self employed, please submit latest SA302 or relevant proof of income.***

	Employed	Self employed		
Person 1	Yes		No	
Person 2	Yes		No	

If you are not currently employed, please indicate which benefits you are currently receiving

	Income Support	Job Seekers Allowance	Employment Support Allowance	Incapacity Benefit	Carers Allowance	Housing Benefit	Council Tax Benefit
Person 1							
Person 2							

Other Income:

Please indicate all other income received into the household

	Working Tax credit	Child Tax Credit	Child Benefit	Grants/ Bursaries etc	Disability Living Allowance	Employment Support Allowance	Any other income/ benefit Please specify
Person 1							
Person 2							
Student							

Evidence:

Evidence must be provided to back up the above information in order for an assessment to be made. Photocopies are acceptable.

The tables below show the evidence you will need to provide with your application form

Once you have declared and identified your benefits on the application, find the 'Type of Income' that applies to you in the first column and the 'Evidence Required' column will tell you what you need to provide. Please tick the end column to indicate which documents have been included in the application

If you are applying for a Special Bursary of £1200 you will need to provide evidence to demonstrate you meet the criteria and to support that claim related to certain benefit categories below

Type of income	Evidence required and timescales	✓
Annual salary	P60 for the last tax year or week 52/ month 12 (March) payslip	
Income Support	Entitlement/ Award letter – dated within the last 3 months	
Job Seekers Allowance	Entitlement/ Award letter – dated within the last 3 months	
Employment Support Allowance	Entitlement/ Award letter – dated within the last 3 months	
Incapacity Benefit	Entitlement/ Award letter – dated within the last 3 months	
Carers Allowance	Entitlement/ Award letter – dated within the last 3 months	
Housing Benefit	Entitlement/ Award letter – dated within the last 3 months	
Council Tax Benefit	Entitlement/ Award letter – dated within the last 3 months	
Working Tax Credit	Working Tax Credit Award Notice - Full Annual Award Notice and not partial Awards	
Child Tax Credit	Working Tax Credit Award Notice - Full Annual Award Notice and not partial Awards	
Child Benefit	Award letter	
Disability Living Allowance	Entitlement/ Award letter – dated within the last 3 months	
Grants or Bursaries	Relevant paperwork detailing entitlement and amount paid	
Any other benefit	Entitlement/ Award letter – dated within the last 3 months	
Any other income	Relevant paperwork. If self employed – latest SA302 from the Inland Revenue or evidence of other proof of income e.g. accounts.	

Declaration

Please read the declaration below carefully before signing.

1. I declare that the statements made on this form are true and to the best of my knowledge and belief are correct in every respect. I undertake to supply and additional information that may be required to verify the particulars given. I understand that if I refuse to provide information relevant to my claim the application will not be accepted.
2. I also undertake to inform the school of any alteration to any of the particulars in writing. I agree to repay the school in full and immediately any sums advanced to me if the information I have given is shown to be false or deliberately misleading.
3. I am aware that the funding covers only this academic year and that I must re-apply next year; there is no guarantee that I will receive funding for future years even if I am eligible for the current year.

Signed (Student)		Date	
Signed (Person 1 or 2)		Date	

For Office use only:

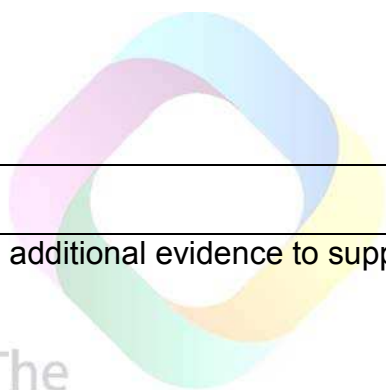
Date application received			
% attendance*		Effort grade*	
Application approved	Yes	No	
Authorised by			
Date of authorisation			

**** Information to be provided by the Post 16 Team***

Bursary Fund Appeal Form

Student Name	
Form	

Please state why you wish to appeal the outcome of your application for a Bursary Fund Award:



Please provide additional evidence to support your appeal:

The
GORSE Academies Trust

Please note that appeals must be submitted within 14 days of the initial decision being made

Signed (Student)		Date	
Signed (Parent)		Date	


For Office use only:

Student Name	
Form	

Reason for initial refusal

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Stage 1 Appeal – Senior Leadership Team

Appeal Outcome	Upheld		Rejected	
Reason for decision				
Signed (SLT)				

Stage 2 Appeal – Governing Body

Appeal Outcome	Upheld		Rejected	
Reason for decision				
Signed (GB)		Date		

