



# SIR THOMAS RICH'S

## Bursary Policy

<b>Date reviewed:</b>	July 2024
<b>Status:</b>	Good Practice
<b>Responsibility:</b>	The Senior Management Team will annually review this policy for fitness for purpose. Any recommended change will be agreed and passed to the Trustees' Finance Committee for approval.

### Contents:

- |   |  |
|---|--|
| 1. Background   | 9. Payments  |
| 2. Bursaries Available  | 10. Qualifying condition requirements                |
| i. General Bursary (officially known as the Vulnerable Bursary) | 11. Application                                      |
| ii. Discretionary Bursary                                       | 12. Process  |
| 3. Bursary Amounts  | 13. Appeals  |
| 4. General Eligibility  | 14. Confidentiality                                  |
| 5. Additional eligibility for General Bursary                   | 15. Change of young person's financial circumstances |
| 6. Additional eligibility for Discretionary Bursary             | 16. Young person transferring                        |
| 7. Those not eligible   | 17. Young person withdrawing                         |
| 8. Evidence   | 18. Supporting documents                             |
|   | 19. Further information                              |

## 1. Background

In March 2011, the Government announced a new 16-19 Bursary Fund scheme to provide financial assistance to those young people who face a financial barrier to continuing in education or training post-16.

The 16-19 Bursary Fund has been allocated by the Department for Education (DfE), via the EFA, the funding agency for 16-19 education and training.

This policy sets out the arrangements for how Sir Thomas Rich's School will prioritise and administer the 16-19 Bursary Fund in 2024/25.

The School is committed to ensuring the Fund is used to support financially disadvantaged young people beginning or continuing their education post-16 and achieving their learning aims.

The named contact at the School for all 16-19 Bursary support/enquiries is Mrs J Miller, Finance Office.

## 2. Bursaries available

There are two types of Bursary available:

### i. General Bursary

A General Bursary is available to all young people who meet the general eligibility criteria as set out in this policy *and* who have been identified as being most in need, as outlined in this policy.

### ii. Discretionary Bursary

A Discretionary Bursary is available to all young people who meet the general *and* additional eligibility criteria as outlined in this policy.

### 3. Bursary amounts

The 16-19 Bursary Fund is a limited fund determined by the ESFA.

The School will retain a portion of the 16-19 Bursary Fund to use as a hardship contingency fund to respond to in-year changes in circumstance.

The General Bursary amount is up to £1,200.

The Discretionary Bursary amounts are variable, dependent on the level of household income, and subject to the number of applicants.

### 4. General eligibility

To be eligible to receive a Bursary, all young people must be aged 16, 17 or 18 on 31 August 2024 and meet the residency criteria in the ESFA Funding Guidance 2024/25. Applicants should be aware that the School is allocated a finite amount of funding from central government for bursaries. If successful Bursary applications exceed allocated funding it will be distributed amongst applicants in relation to their priority levels of eligibility.

### 5. Additional eligibility for General Bursary

A General Bursary of up to £1,200 is available to all young people who are identified as being:

- currently or previously looked after (for a period of at least 13 weeks since the age of 14) by the Local Authority, and/or;
- in receipt of Income Support/Universal Credit in their own right, and/or;
- disabled and in receipt of both Employment Support Allowance/Universal Credit *and* Disability Living Allowance/Personal Independence Payments.

### 6. Additional eligibility for Discretionary Bursary

A Discretionary Bursary is available to all young people where the gross annual household income, as assessed by HM Revenue & Customs, does not exceed £28,000.

### 7. Those not eligible

Applications to the 16-19 Bursary Fund are not open to young people aged under 16 or over 19 on 31 August 2024.

### 8. Evidence

All applications to access the 16-19 Bursary Fund must be supported by appropriate evidence. Copies of evidence shall be retained by the School to provide financial assurance as required. All evidence will be treated as confidential.

Acceptable supporting evidence for the **General Bursary** will be either a:

- Statement from the Local Authority confirming the young person's current or previous looked after status;
- Recent Entitlement or Award Statement setting out the benefit to which the young person is entitled.

Acceptable supporting evidence for the **Discretionary Bursary**:

- **Part 1** of the latest **Tax Credit Award Notice** (TCAN) for the young person's household. This document from HM Revenue & Customs details entitlement to Tax Credits and the Total Income for the year 6 April 2023 to 5 April 2024.

- **P60 End of Year Certificate** for all adults in the young person's household who contribute to household costs. This certificate is a statement of earnings from an employer. It must be for the correct adult(s) and for the correct Tax Year (to 5 April 2024). The income will be shown as Total for year.
- **Universal Credit Award Statements** for the 3 most recent months.
- **Self -Assessment Tax Calculation (SA302)**. This is the equivalent of the P60 for self-employed people. It must be for the correct adult(s) and for the correct Tax Year (to 5 April 2024). The income will be shown as Total for year.
- Confirmation from the Local Authority of entitlement to **Free School Meals** (FSM).
- Details of any other **income based benefits** or **unearned income** (e.g. shares, savings, rental income)

## 9. Payments

Subject to meeting the condition requirements as detailed below, payments will be made monthly in arrears by BACS. A young person must have a valid bank account in their name unless there are exceptional reasons which mean an appointee has been named to manage the affairs of the young person.

## 10. Qualifying condition requirements

All young people in receipt of a Bursary must meet weekly punctuality and attendance requirements to ensure continued support. In addition, all young people in receipt of a Bursary must behave appropriately and submit work of an appropriate level and to required deadlines. Students will be expected to produce evidence at agreed intervals, throughout the bursary period, showing how their Bursary is being used. If the young person does not meet these conditions, the school reserves the right to withdraw or suspend Bursary payments.

These conditions will not be additional to those expected of any young person within the School.

## 11. Application

Applications for a Bursary must be made using the correct Application Form and should be submitted in full by **27 September 2024**. Applications made after this date will be considered as long as sufficient funds are available. However, once the Bursary Fund has been used, it will not be possible to consider further applications.

Consideration will be given to assisting any young person to make an application where they are unable to do so due to a level of learning difficulty and/or disability.

Consideration will also be given to assisting any young person in making an application where they are not able to provide supporting evidence due to difficulties with engagement or support from their parent/guardian/carer(s).

## 12. Process

All applications for a Bursary will be assessed by a 16-19 Bursary Application Panel, consisting of:

- **The Headteacher**
- **Head of Sixth Form**
- **Finance & Operations Director**
- **Bursary Administrator**

The Panel will review the application, supporting evidence and any other personal circumstantial evidence and young people will be notified of the outcome by the end of October.

Qualifying young people will be invited to an informal discussion with the Finance & Operations Director to discuss the conditions of the bursary and how it is administered.

### **13. Appeals**

If any young person or their parent/guardian/carer(s) is not satisfied with the outcome of their application, they should write to the Finance Manager within seven days.

The Finance & Operations Director will consider and respond to appeals within **two weeks** of receipt.

### **14. Confidentiality**

Applications and supporting evidence will be confidential to the 16-19 Bursary Application Panel. The applications and supporting evidence will remain confidential during processing, payment and storage. If it is necessary to obtain additional information to reach a decision, the young person and/or their parent/guardian/carer(s) will be told the reasons why this is necessary prior to sharing any further information.

### **15. Change of young person's financial circumstances**

Any young person in receipt of a Bursary has a duty to inform the School should their financial circumstances change, or those of their parent/guardian/carer(s) change (e.g. increase in household income). This would not automatically mean any future Bursary payments will be stopped but would result in a convening of the 16-19 Bursary Application Panel to determine whether the payments continue or be stopped and the funds redistributed.

### **16. Young person transferring**

Where a young person in receipt of a Bursary transfers *out of* the School to another education/training provider in-year, the School will liaise with that provider to ensure continuity of Bursary payments to enable the young person to complete the learning aims.

Where a young person in receipt of a Bursary transfers *into* the School from another education/training provider in-year, the School will liaise with that provider to ensure continuity of Bursary payments to enable the young person to complete the learning aims.

### **17. Young person withdrawing**

Where a young person in receipt of a Bursary withdraws from the School and does not transfer to another education/training provider, Bursary payments made prior to the date of withdrawal will not be recovered.

### **18. Supporting documents**

In addition to this policy being openly shared with all young people and their parent/guardian/carer(s), the following documents will be used in the 16-19 Bursary process:

1. Application Form
2. Information for young people
3. Information for parent/guardian/carer(s)

### **19. Further information**

Further national information on the 16-19 Bursary Fund can be found on the Department for Education website.