



16 to 19 Bursary Policy

(Statutory)

Approved: Summer 2024
Date of Next Review: Summer 2025

Equality Impact Assessment - Policy Review

In reviewing this policy, we have tried to make a positive impact on equality by considering and reducing or removing inequalities and barriers which already existed. We have ensured that this policy does not impact negatively on the dimensions of equality.

1. Introduction

The 16 to 19 Bursary Fund provides financial support to help students overcome specific financial barriers to participation so they can remain in education. There are two types of 16 to 19 bursaries:

1. Bursaries for defined vulnerable groups;
2. Discretionary bursaries, which institutions award using policies they set, in line with ESFA funding rules and their own policy.

Academies are expected to set their own criteria and expectations for administration of the Bursary fund. In doing so they must have a clear policy covering these arrangements as well as the application and appeals process agreed by the appropriate governing committee.

The following details how The Roseland Multi Academy Trust [‘the Trust’], and its member Sixth Forms at Falmouth School and Treviglas Academy, intend to administer the bursary allocation and distribute funding to eligible learners.

2. General

The bursary fund is intended to help students with the essential costs of participating in their study programme, so to help with the cost of essential books or equipment or with the cost of travelling to the Academy. The bursary fund is not intended to support costs unrelated to education (eg. living costs), extra-curricular activities or provide additional learning support such as counselling, mentoring or extra tutoring.

Eligible students or parents/carers must complete a bursary application form, identifying which bursary they are applying for and provide relevant evidence in order for the application to be assessed. Eligibility and evidence requirements are summarised on the application form, and detailed below.

Application forms are included within a student’s enrolment pack, available from the Sixth Form Administrator or on the Academy’s website. Applications are not time limited and may be made at any time during the academic year, and students or parents/carers may re-apply if their situation or eligibility criteria has changed since their last application.

The Trust operates a no-cash policy and as such, payments will be paid ‘in kind’ wherever possible (e.g. the Trust may purchase bus passes, equipment, books etc. on behalf of the student), or via the BACs system.

Requests for retrospective payments or reimbursement will only be considered in exceptional circumstances and when considered in the best interests of both the Trust and the student. Any agreed retrospective payment can only be made when accompanied with a valid receipt and shall only be reimbursed via BACs.

3. Emergency Food

For the 2024-25 academic year, the Trust can use the bursary fund in individual cases of severe hardship, to provide food support whilst a student attends a study programme, for a student considered to be in real need and without undertaking the checks on household income or gathering other evidence that would normally be required, and as detailed below.

For audit purposes, the Trust will retain:

- a record of the number of students supported in this way;
- the number of days this support is given;
- the value of support given to each student;
- a detailed rationale for the food support;
- the signed confirmation of receipt of funding by the student, if actual spend receipts are not obtained

Support is not expected to continue on an ongoing basis for any individual student, and the Trust will exercise its discretion in each case and remain mindful that this flexibility relates to food support only, as outlined within the DfE's 16 to 19 Bursary Fund guide 2023 to 2024 academic year.

4. Eligibility

Students must be enrolled at a Trust Sixth Form and meet the age and residency criteria which follow to be eligible for support from the bursary fund, as well as meet the Household Income threshold for discretionary bursary awards:

Age

A student must be aged 16 or over, but under 19, on 31st August on each year of study to be eligible for help from the bursary fund.

Students aged 19 or over are only eligible to receive a discretionary bursary 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). These two groups of aged 19+ students can receive a discretionary bursary while they continue to attend education (in the case of a 19+ continuer, this must be the same programme they started before they turned 19), as long as their eligibility continues and their institution considers they need the support to continue their participation.

Students aged 19 or over are not eligible for bursaries for vulnerable groups.

The Trust will generally only pay bursaries to students aged 16 or over. However, in exceptional circumstances where under 16 students are on funded 16 to 19 study programmes, Sixth Forms may use their discretion to pay bursaries to younger students (for example, where a student is enrolled within a Trust Sixth Form and following an accelerated study programme).

Residency

Students must meet the residency criteria set out by the [ESFA funding regulations for post-16 provision](#). This document also specifies the evidence institutions must see and retain for audit to confirm eligibility for post-16 funding (and therefore meet the residency criteria for bursary fund eligibility). A copy of this document is available from the Sixth Form Administrator or online under *Advice: funding regulations for post-16 provision*

Accompanied asylum seeking children (under 18 with an adult relative or partner)

As long as an asylum seeker has not had their application for asylum refused, the Trust can provide in-kind student support such as books, equipment, or a travel pass. The Trust cannot give cash to any asylum seeker unless they are an unaccompanied asylum-seeking child (UASC).

Unaccompanied asylum seeking children

Unaccompanied asylum seeking children are treated as looked after children and are eligible for a bursary for vulnerable groups ('in care' group), where they have a financial need.

When these young people reach legal adulthood at age 18, the Trust must consider their immigration status. If the asylum claim is decided in their favour, the local authority must provide them with the same support and services as they do care leavers. As such, they continue to be eligible for a bursary as a student from a vulnerable group until they reach the upper age limit. Where an asylum claim is not supported, the individual may not be able to stay legally in the UK. When asylum claims have been fully heard/the appeals process exhausted, an individual has no entitlement to public funds (with a few exceptions where the withdrawal of support would be seen as a breach of human rights).

5. Bursaries for defined vulnerable groups

Students who meet the criteria, and who have a financial need, can apply for a bursary for vulnerable groups. The defined groups reflect that these students are unlikely to be receiving financial assistance from parents or carers, so may need a greater level of support to enable them to continue to participate.

A bursary of up to £1,200 is available to students who meet the criteria, set out below. Students will be awarded the amount of support they need to participate based on an assessment of the types of costs they have, and may not be automatically awarded the maximum £1,200.

The defined vulnerable groups are students who are:

- in care or a care leaver of the Local Authority;
- receiving Income Support (IS), or Universal Credit (UC) because they are financially supporting themselves or financially supporting themselves and someone who is dependent on them and living with them, such as a child or partner
- receiving Disability Living Allowance (DLA) or Personal Independence Payments (PIP) in their own right as well as Employment and Support Allowance (ESA) or UC in their own right

The bursary for vulnerable groups can pay up to £1,200 per year to a student participating on a study programme that lasts for 30 weeks or more, if they are assessed as being in need of that amount of support. Students on study programmes of less than 30 weeks will be paid a pro-rata amount, as appropriate based on an assessment of their actual needs.

The Trust can also pay a bursary to a vulnerable group student of *more than* £1,200 if they are assessed as requiring extra help to remain in education. Any payments over £1,200 must be paid from the discretionary bursary allocation (detailed below). In such instances, all eligibility criteria and usual assessment processes for the discretionary bursary must be met.

Bursary awards will be paid 'in kind' (e.g. the Trust may purchase bus passes, equipment, books etc. on behalf of the student) wherever possible. In exceptional cases, where it is considered in the best interests of both the Trust and the student, students may receive payments equal to £30 a week made directly to the student's bank account via BACs. Payment will be made either bi-weekly or monthly as agreed between the Sixth Form and the Trust.

6. Discretionary bursaries

The discretionary bursary is to assist students with the cost of items they would otherwise need to pay for to participate, for example travel, essential books, equipment, or specialist clothing (such as protective overalls, for example). The bursary fund may also support with field trips and other course-related costs, as well as costs associated with attending industry placements, university interviews and open days.

It will not support extra-curricular activities where these are not essential to the students' study programme, or to provide living costs support.

The Trust welcomes applications from eligible students for the discretionary bursary whose gross annual household income is up to £80,000 per year. The level of contribution from the fund will vary depending on overall gross household income as follows:

- up to £60,000 per year, the bursary may reimburse up to 100% of the total cost;
- between £60,000 - £80,000 per year, the bursary may reimburse up to 75% of the total cost.

The above thresholds should be considered a maximum level of contribution, with the overall amount of contribution from the Bursary Fund being assessed on a case-by-case basis. The Trust reserves the right to request contributions from students or parents/carers regardless of the overall household income. There is no set limit for the total amount of discretionary bursary that can be awarded to individual students, and the total amount will vary depending on student need. The award will be identified through individual assessment of actual need using the Trust's application form and accompanying evidence, as well as through discussion with the student's form tutor and course teachers.

Where possible bursary awards will be provided 'in kind', in the form of equipment or services e.g. physical books, equipment or travel tickets etc. The Trust may also look to provide support through the discretionary bursary fund to students who are not automatically eligible for an award, but who face exceptional circumstances during the academic year which impact on their ability to participate in full time education. In all cases, proof of income or hardship will be asked for and awards are dependent upon available funds.

7. Assessment

Eligibility for a bursary award is assessed using the Trust's application form, together with appropriate accompanying evidence that could include (but not limited to):

- A recent benefit entitlement letter
- Written confirmation of the student's current or previous looked after status from the Local Authority
- Recent P60 Tax Credit Award Notice
- Universal Credit Award Notices (3 most recent monthly award statements)
- Evidence of self-employment income
- Confirmation of being in receipt of Free School provided by the Local Authority

Additionally, non-financial information will also be taken into consideration, for example details of the number of dependent children in the household or distance to travel to their Sixth Form.

Application forms must be submitted to the Sixth Form Administrator, either in writing or attached to an email, who will check forms are fully complete and have the required evidence needed for

correct and fair assessment. Incomplete application forms will be returned and will not be considered for assessment until any additional information required has been submitted.

Completed applications will then be assessed by **at least one** of the following:

- The Head of Sixth Form;
- The Deputy Head of Sixth; or
- A member of the academy's Leadership Team in the event of staff absence from the above.

Hereon these staff will be referred to as the 'Lead Assessor'.

Where possible, assessments will be considered by more than one of the above, through the formation of a Bursary Award Panel. The Panel **must** include at least one Lead Assessor, but may also include other members of the Leadership, Teaching or Support Staff from the academy. The Sixth Form Administrator or academy's Finance Administrator may **not** sit on such a panel, due to their involvement elsewhere within the assessment and award process in order to maintain appropriate segregation of duty. Formation of a panel is not necessarily required, but may be considered advantageous at certain periods in the year, such as the beginning of the academic year where there may be a higher volume or more complex applications, but less likely when considering a singular or low volume of applications later in the year. The Lead Assessor will determine whether to convene a panel or consider the application individually.

Awards will be considered on a case-by-case basis taking into consideration the actual student need and confirming eligibility. Students will then be notified of the decision by the Sixth Form Administrator via email to the student's email account, detailing next steps and how any approved award will be processed.

Once approved, awards will be processed in line with the Trust's internal 16 to 19 Bursary Procedure. In the instance of bursaries for defined vulnerable groups, an application will be made by the Sixth Form Administrator to the ESFA Student Bursary Support Service.

Each application, as well as a record of the assessment and outcome, will be retained at all times whilst the student is enrolled and in line with the Trust's records retention systems. Where applications are successful, a record will also be retained of individual student's claims throughout the year to ensure fairness and to ensure that claims do not exceed the government grant.

Once applications have been approved and any initial awards made, students will not be required to submit another application for further support during that academic year and may contact the Sixth Form Administrator should any additional support be necessary at a later date. Any additional request will be considered in line with the above by a Lead Assessor and processed as outlined within the Trust's internal 16 to 19 Bursary Procedure.

8. Conditions

Students in receipt of either the bursary for students in vulnerable groups or the discretionary bursary must notify the Sixth Form Administrator if their circumstances change.

Funding may be withdrawn for students who fail to attend regularly, and students in receipt of bursary funds will be expected to abide by the academy's Sixth Form Learning Agreement.

9. Appeals

If a student or parent/carer wishes to appeal against any decision relating to the bursary, then the appeals procedure below should be followed:

- Submit an appeal in writing or by email to the Sixth Form Administrator within 7 days during term-time of being notified of the award.
- The appeal will be reviewed by a Lead Assessor, with a written response provided within 7 days during term-time.

Students or parents/carers who are not satisfied with this decision may appeal to the Headteacher of the Academy. Should the Headteacher have been a part of any Bursary Award Panel, the appeal will be considered by another member of the academy Leadership Team who was not a part of the original panel. Their decision will be final and the outcome of the appeal will be communicated in writing.

Where circumstances change during the academic year and students become eligible for support, students should speak with the Head of Sixth Form or Sixth Form Administrator in the first instance, and may be directed to submit a new application. Appeals should not be submitted where this is the case, as additional evidence will be required for assessment and any re-application will be considered on its own merit.

10. Review & Communication

The Trust understands that students in vulnerable groups may be harder to identify or engage in education and are potentially less likely to be aware of the support available from the Bursary Fund. The Trust will therefore actively seek out and encourage students in vulnerable groups to apply for support.

The Head of Sixth Form or their appointed Deputy should submit an annual report to the Chief Financial Officer of the Trust outlining how the bursary fund has been spent and detail the outcomes, which will then be passed to the Trust Board, Business & Finance Committee and/or Local Monitoring Committees for review.

This policy is shared across all Trust Sixth Forms and will be reviewed on an annual basis by all Head of Sixth Forms in partnership with the Chief Financial Officer, taking into account the views of the Trust, students, and statutory guidance from the Department for Education (DfE) and the Education and Skills Funding Agency (ESFA).

Full details of the 16 to 19 Bursary Fund will be made available to all Post-16 and prospective Post-16 students via the school website, Post 16 assemblies, enrolment packs, tutors and notice boards.

11. Administration Contribution

The Trust reserves the right to charge up to 5% of the academic year allocation for administrative costs relating to the 16 to 19 Bursary Fund. This decision will be made by the Chief Financial Officer of the Trust and reported to the Trust's Business & Finance Committee each year.