



# **16-19 BURSARY FUND POLICY (ACADEMIES)**

## **2021/22**

**The OHC&AT Board of Directors has agreed this Policy and as such, it applies across all OHCAT Academies – 2<sup>nd</sup> July 2021.**

Jay Mercer  
Chair of OHCAT Board

A handwritten signature in black ink, appearing to read 'Jay Mercer', is positioned below the printed name and title.

# 16-19 Bursary Fund Policy (Academies)

## INTRODUCTION

Orchard Hill College and Academy Trust (OHC&AT) is committed to providing outstanding educational opportunities for all our pupils and students. As a family of providers working for mutual benefit, we believe that together we can offer the very best for our pupils and students and for their local communities.

This policy sets out arrangements for how Orchard Hill College Academy Trust (OHCAT) will operate the 16-19 Bursary Fund across its academies for the academic year 2021-22. This policy is based on the Education and Skills Funding Agency's (ESFA) guidance for the 16 to 19 bursary fund 2021 to 2022 academic year.

## WHAT IS THE 16-19 BURSARY FUND?

The 16-19 Bursary Fund is a scheme set up by the Department for Education (DfE) and funded by the ESFA. The Fund provides financial support to eligible students to help overcome their specific financial barriers to participation so they can remain in education and training.

## WHO IS ELIGIBLE TO APPLY?

There are two types of bursary: a discretionary bursary and a vulnerable bursary.

To be eligible for the **discretionary bursary**, a student must:

- Be enrolled at an OHCAT academy starting in September 2021.
- Have 'home' student status or have been granted full 'refugee' or 'asylum seeker' status.
- Have been 'ordinary resident' in the UK, EU or EEA continuously for the last three years with 'settled status' which means having indefinite leave to remain
- Have a household income of £28,000 or less per year.
- Be aged 16 or over but under 19 at 31 August 2021 **or**
- Be aged 19 or over with an Education Health and Care Plan (EHCP) **or**
- Be aged 19 or over and continuing on a study programme which began when aged 16-18.

To be eligible for the **vulnerable bursary**, students must meet the age, enrolment and residency criteria above and fall into one of the following categories:

- Young people who are looked after (in care)
- Young people leaving care
- Young people in receipt of Income Support or Universal Credit in place of Income Support, in their own name

- 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.

Students aged 19 or over are not eligible for the vulnerable bursary.

## **HOW IS THE 16-19 BURSARY FUND ALLOCATED?**

### **Discretionary Bursary**

Discretionary Bursaries are awards made to students by the academy to help young people overcome the individual financial barriers to participating in education, for example help with:

- travel
- educational visits
- books and equipment
- clothing
- specialist equipment
- other circumstances that prevent participation

Funding for the Discretionary Bursary is received directly by the academy from the ESFA. The allocation process for these funds is as follows:

- Students that apply will be assessed individually against the criteria and will be awarded a bursary fund based on their actual financial need
- Any unspent discretionary funding from the previous academic year will be prioritised for students based on their actual financial need in the current academic year
- Some funding will be held back for a contingency for students whose personal circumstances may change
- 5% of the discretionary fund will be held back to cover administrative costs

### **Vulnerable Bursary**

The Vulnerable Bursary Fund is designed to help support young people who face the greatest financial barriers to participate in education or training.

The academy has to apply for the Vulnerable Bursary via a Funding Claim form to the Student Bursary Support Service ([SBSS](#)) once eligible young people are identified. The Student Bursary Support Service, part of the ESFA, will then issue funds directly to the academy.

Applications must be supported by appropriate evidence, such as:

- A letter from the DWP setting out the benefit the young person is entitled, confirming that the terms of their benefit entitlement allow them to participate in further education or training
- Written confirmation of the young person's current or previous looked-after status from the Local Authority which looks after them or provides their leaving care services.

Eligible students can apply for a vulnerable bursary of **up to** £1,200.

## **HOW TO APPLY**

The Application Form for the 16-19 Bursary Fund Policy is at Appendix A.

Evidence of eligibility is required and should be included with the completed application form. Funding is not guaranteed by the acceptance of an application form. The academy will notify students/families in writing of the outcome of their application.

## **Conditions for receipt of student bursaries**

Receipt of both vulnerable student bursaries and discretionary bursaries is conditional on the student meeting attendance standards as defined by the academy.

## **Assessment and approval of applications**

Each application with supporting documentation will be assessed in strictest confidence using the checklist at Appendix B and approval form at Appendix C.

Discretionary fund payments will be subject to review and approval by a representative of the academy Senior Leadership Team.

## **High value equipment**

We may be able to help with the cost of high value equipment such as laptops, cameras and tablets where students require them to successfully complete their course. This will be dependent on the budget available. The equipment will remain the property of OHC&AT and should be returned once the course has been completed so it can be used by another student. To ensure this happens, all equipment will be kept at the academy unless specifically agreed otherwise. See Appendix D School Equipment for Student Use.

In special circumstances and at the discretion of the academy Senior Leadership Team, some students may be allowed to retain their equipment at the end of the course, where a particular need has been identified.

## **PAYMENT**

Please note that the academy can choose to pay Bursary awards 'in kind' e.g. by purchasing equipment required or may make payments directly into the student's bank account by BACs. The level of support which the academy can offer under the Discretionary Bursary is dependent on the funding received from the ESFA and the number of applications received.

*Please note: Students will need to have a current bank account. If the payment is to be made payable to someone other than the student, proof of Power of Attorney must be provided.*

## **RECORDING AND REPORTING**

Secure records will be kept of all bursary awards, receipts and payments for a period of six years.

An annual report on the number of bursary awards made and the total value will be produced by the academy.

## **APPEALS**

If a young person or their parent/carer are not satisfied with the outcome of their application, they should appeal in writing to the Principal of the academy within 10 working days, stating the reasons why. The Principal of the academy will review the application within 15 working days of receiving the appeal.

The decision of the academy Principal is final and will be given in writing within 10 working days of their decision.

## **POLICY REVIEW DETAILS**

<i>Version:</i>	2.1
<i>Reviewer:</i>	Lynn Barratt, Corrina Jenkins
<i>Approval body:</i>	Family Board
<i>Date this version approved:</i>	2 <sup>nd</sup> July 2021
<i>Due for review:</i>	Summer 2022

## APPENDIX A: 16-19 BURSARY FUND APPLICATION FORM 2021-22

Please complete this form and bring it together with your supporting evidence to the Academy you attend in order for your application to be processed.

Student details					
Title:		First name:		Surname:	
DOB:		Age: <i>(on 31<sup>st</sup> August 2021)</i>			
Address:					
Postcode:		Tel:		Email:	
Have you the right of abode and been resident in the UK for the last three years?				Yes	No
Do you have an Education Health and Care Plan?				Yes	No

Bursary criteria
<p>To qualify you must:</p> <ul style="list-style-type: none"> <li>• meet the ESFA's residency criteria</li> <li>• be aged 16 or over and under 19 on 31 August 2021 or</li> <li>• aged 19 or over with an Education Health and Care Plan (EHCP) or</li> <li>• aged 19 or over and continuing on a study programme which began when aged 16-18</li> </ul>

Vulnerable Bursary criteria		
To qualify you must fall into one of the below categories and produce the required evidence as stated.		
Are you in receipt of Income Support or Universal Credit? <i>(evidence required - Income Support or Universal Credit Statement Letter)</i>	Yes	No
Care Leaver or currently looked after in care? <i>(evidence required - letter from Local Authority)</i>	Yes	No
Disabled student in receipt of <b>both</b> Employment Support Allowance or Universal Credit and Disability Living Allowance/Personal Independence Payments <i>(evidence required, award letter showing in receipt of <b>both</b> ESA (UC) + DLA/PIP)</i>	Yes	No

Discretionary Bursary criteria
Your household income is one of the criteria, which will help us to assess your application. If your <b>TOTAL</b> Household income exceeds <b>£28,000 per annum</b> , you will not be eligible for a Bursary payment.
Please tick to indicate what type of evidence you have provided. If you cannot provide evidence then we cannot process your application for bursary payments.

P60		Income Support/ Universal Credit (award letter)		Full Tax Credit Award Notice	
Self-employed earnings (official tax return)		Other benefits/ pension (award letter)		Wage slips for household	

**Discretionary Bursary criteria continued....**

The amount of financial assistance you will receive is dependent on your personal circumstances. It is intended to help you with the costs of overcoming any financial barriers you may have when attending learning. Using the table below, please tell us what you will need financial assistance. This information is strictly confidential and will only be used for this assessment purpose.

What do you need financial assistance for?	How much will you need?
Travel	
Educational visits	
Books or equipment	
Clothing	
Specialist equipment	
Any other assistance or exceptional circumstance	

**Payment details**

Please note that the academy can choose to pay Bursary awards 'in kind' e.g. by purchasing equipment required or may make payments directly into the student's bank account by BACs. Please provide your bank details below as printed on your bankcard or statement.

Name of account holder	
Sort code	
Account number	
Name of bank or building society	

**Declaration**

I certify that the information I have given on this application form is true and accurate.

I understand that the information given on this form may be shared with other departments within the Academy including the Academy Trust finance team.

I understand that if I withdraw from the Academy I may be liable to pay back all or some of the monies awarded to me or the Academy on my behalf.

Print Name \_\_\_\_\_ Date \_\_\_\_\_

Signature \_\_\_\_\_ Relationship to student \_\_\_\_\_  
(if applicable)

**Power of Attorney**

If you wish the payment to be made to someone other than the student you must provide proof that they are responsible for the student's finances such as Power of Attorney. This can include a letter from the Department of Work & Pensions.

Payment to be made to \_\_\_\_\_



## APPENDIX B: ASSESSMENT CHECKLIST 2021-22

### FOR SCHOOL USE ONLY

#### Eligibility: all bursaries

	Student meets the age criteria
	Eligible education provision
	Student meets the residency criteria for post-16 provision
	Evidence of eligibility has been retained

#### Bursary for defined vulnerable groups

	Student falls within one of the defined vulnerable groups for example, in receipt of the specified benefits in their own right or in care/care leaver.
	Financial needs assessment carried out to confirm actual financial need and amount of support required. <b>No student should automatically receive £1,200.</b>
	Appropriate evidence seen and copies retained to confirm student's eligibility.
	Support awarded in kind (for example, books or equipment purchased on student's behalf) or BACs payment made. Receipts should be retained.
	Award letter issued to student confirming the amount of financial support, what support will be made in-kind and payment conditions.

#### Discretionary bursary

	Evidence to confirm the student meets the bursary fund criteria, including household income and statement of actual participation costs.
	Evidence of income and overall eligibility obtained, and copies retained.
	Assessment of student's actual financial needs carried out. <b>Block, blanket or flat rate payments are not permitted – the bursary award should reflect the actual costs the student has.</b>
	Support awarded in kind (for example, books or equipment purchased on student's behalf). Receipts should be retained.
	Award letter issued to student confirming the amount of financial support, what support will be made in-kind and payment conditions.

**APPENDIX C: APPROVAL FORM 2021-22**
**FOR SCHOOL USE ONLY**
**Eligibility – please tick appropriate box (✓)**

<b>Vulnerable Bursary</b>	Young people who receive income support/universal credit. Care leavers or young people who are looked after children. Disabled young people in receipt of both Employment Support Allowance and Disability Living Allowance/PIP.
<b>Discretionary Bursary</b>	Young people facing financial barriers to participation in education.

<b>16-19 Discretionary Bursary Fund Assistance Requested</b>	<b>Assistance Granted ✓</b>
Travel	
Educational visits	
Clothing	
Books or equipment	
Any other assistance or exceptional circumstance	

**SIGNED:**
**DATE:**
**NAME:**
**POSITION:**
*To be signed by a member of the Academy Senior Leadership Team*

## APPENDIX D: SCHOOL EQUIPMENT FOR STUDENT USE

### FOR SCHOOL USE ONLY

Student Name:

Equipment Provided:

Make:

Serial number:

Asset Tag Number:

#### **Conditions of school equipment being provided for student use**

All equipment supplied to the pupil/student remains the property of the school.  
Equipment must be returned to the school on request.

The equipment supplied is for the purpose of supporting the named student with their school work only. The equipment must not be passed onto a third party.

If there is any damage to the equipment the school must be notified immediately.

By signing this form

- I agree I have received the equipment listed above
- I agree to the above conditions of the school equipment being provided
- I agree to abide by the school's acceptable use of IT policy

Signed:

Print name:

Date equipment issued:

Signed by school representative:

Date equipment returned to school: