



## 16-19 Bursary Fund Policy

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## Introduction

- 1 Alderbrook School receives an annual allocation of 16-19 Bursary Funds from the Education & Skills Funding Agency (ESFA) to assist young people who face the greatest barriers to continuing in education or training post 16. This policy sets out the arrangements for how Alderbrook School will administer and allocate the 16-19 Bursary Fund in 2023-24.
- 2 The school is committed to ensuring the Fund is used to support financially disadvantaged young people continuing in their education post 16 and achieving their learning aims.
- 3 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 school or college, for example. The bursary fund is not intended to support costs not related to education (living costs), extra-curricular activities or provide learning support – services that institutions give to students – such as counselling, mentoring or extra tutoring.

## Student Eligibility

The 16-19 Bursary has **two types of award**:

- 4 Students in the 'vulnerable group' as defined by the ESFA (i.e. young people in care, 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) may be eligible to receive a **Vulnerable** Bursary Award of up to £1,200 per year. This is paid directly by the ESFA to the school.
- 5 The school may also make individual **Discretionary** Bursary Awards that best fit the needs and circumstances of our students. Bursary awards will be targeted towards students facing financial barriers to participation and achievement, such as the costs of examinations, curriculum trips, books or equipment etc.
- 6 The fund from which Discretionary Bursary Awards can be made is a finite amount and the school retains the right to hold a proportion back in order to respond to exceptional or circumstantial in year changes.
- 7 To be eligible to receive a bursary, students must be:
  - Aged over 16 and under 19 on 31 August in the academic year in which they start their course
  - Resident in the UK for 3 years or more
  - Enrolled on full time A level courses
  - On a means-tested benefit, or a dependant of parents who are on a means-tested benefit (we will use eligibility for Free School Meals (FSM) in the first instance), in financial hardship or in the 'vulnerable group' as defined by the ESFA above.

## Application and Assessment Procedure

- 8 As a school, we will ensure we assess the actual financial needs of individual students in addition to eligibility when awarding bursary funding. No student will be automatically be awarded a set amount of funding without an assessment of the level of actual financial need they have.

- 9 All applications for the Alderbrook School 16-19 Bursary Fund must be completed using the school application form (see Appendix 1).
- 10 Any applications will be assessed using the ESFA checklist
- 11 Students who are applying for the Vulnerable Bursary Award must be able to provide evidence that demonstrates they meet the eligibility criteria set out above to receive an award of up to £1200 per year.
- 12 If students are applying for a Discretionary Bursary Award they must be able to provide evidence that demonstrates their parents/carers are in receipt of a means-tested benefit and/or that they are in financial hardship. We will use our discretion to make awards to students in ways that best fit their needs and circumstances.
- 13 Priority for these discretionary awards will be given in the first instance to those students eligible for Free School Meals. All eligible students are encouraged to apply for FSM as soon as possible.
- 14 It is our intention to inform all applicants of the outcome of the assessment of their application within two weeks of submitting their completed application form. They will receive written confirmation of the outcome.
- 15 **Please note:** the Bursary Fund is a finite amount of money and will be distributed according to need in the fairest way possible. The value of any Discretionary Awards will depend on the total demand on the Fund. A portion of the Fund will be retained for contingency i.e. claims later in the year. The school also retains the right to use up to 5% of the total fund in order to cover administration costs.

#### Vulnerable Bursary Awards

- 13 Following a meeting with a member of the sixth form team and the finance team, where we will discuss priority payments needed up front, e.g. travel costs to school or equipment costs, we will then organise the remainder to be paid weekly at a rate determined by the number of weeks in the A level course.

#### Discretionary Bursary Awards

- 16 A significant portion of the total fund will be awarded on a discretionary basis to any individual student in genuine financial hardship for specific benefits. Such benefits might include UCAS fees, train tickets to open days, equipment for studies, business dress, educational trips etc. The funds can be used to pay for the benefit directly or to reimburse an expenditure supported by a receipt (see Appendix 2).
- 17 Payment of any Bursary will be conditional on students meeting certain income eligibility criteria as well as maintaining high standards of attendance, behaviour and effort. See Appendix 3 for Agreement with school – Attendance, Behaviour and Effort.
- 18 Examples of acceptable supporting evidence for the Discretionary Bursary are:
  - A full T602E Tax Credit Award Notice (TCAN) for all the adults in the young person's household. This document from HM Revenue & Customs details entitlement to Tax Credits and shows the total income for the year.
  - Other Income Support or Universal Credit award letters that show evidence of income.

- 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 most recent Tax year end. The income will be shown as Total for the Year.
  - Payslips from the previous 3 months for all adults in the young person's household.
  - 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 most recent Tax Year end. The income will be shown as Total for the Year.
  - Evidence of other benefits, pension awards etc.
  - Confirmation from the Local Authority of entitlement to Free School Meals (FSM).
- 19 To receive bursary payments students must have a bank account in their own name that will accept BACS payments (it is not possible to make BACS payments into a post office account). If students do not have a bank account, they will need to apply to open one. If there is a delay in setting up a bank account that will result in further financial hardship it may be possible to make interim payments in exceptional circumstances. In this case, the student plus one parent/carer will be required to attend a meeting with the Finance Officer. Both student and parent/carer will be required to sign for the receipt of interim funds.
- 20 Any books, reference materials and non-consumable equipment funded by the Bursary remain the property of Alderbrook School and must be returned to Alderbrook School at the end of the course, or before if students leave early.
- 21 Students will be required to repay any overpayments resulting from early withdrawal from a course or change in circumstances.

## Records and Data Protection

- 22 Staff involved in administering the 16-19 Bursary will comply with Alderbrook School's policy on the storage and transfer of information supplied in the course of application and payment of funds.

## Fraudulent Claims

- 23 We must protect public funds from the possibility of fraudulent claims. We will ask for detailed information to prove eligibility so we can distribute funds fairly. If a claim is considered fraudulent during our spot checks or auditing processes and evidence is found that misleading or fraudulent information has been knowingly submitted by a student or parent, resulting in the student receiving a bursary they were not entitled to, we will request that the money awarded is repaid in full. If a student fails to repay the award, court action may be taken.

If institutions find evidence that misleading or fraudulent information has been knowingly submitted by a student or parent, resulting in the student receiving a bursary they were not entitled to, they should

## Appeals

- 24 If an application is unsuccessful, students have the right to appeal against the decision in writing to the Headteacher. The letter should clearly state why they feel the award should be reconsidered. They may be invited to provide additional information or invited to discuss individual circumstances as part of the appeal.

## Monitoring and Audit

25 Alderbrook will monitor the bursary payments as per the ESFA guidance

## Appendix 1

### 16-19 Bursary Application Form

Please complete all details in full as your application cannot be considered without all the information requested. If you need further information or help completing the application please contact the Sixth Form Administrator.

#### Section 1: Student's Personal Details

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Surname

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First Name(s)

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Date of Birth

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#### Section 2: Eligibility for a Vulnerable Group Bursary

You may be entitled to receive a bursary of up to £1,200 per year if you are in any of the categories described below. Please tick any that apply and submit the relevant evidence, which is listed, to the Sixth Form Administrator:

- ☐ I am a young person who is looked after in local authority care  
*Evidence – confirmation letter from your local authority*
- ☐ I am a young care leaver  
*Evidence – confirmation letter from your local authority*
- ☐ I, the student, receive income support or universal credit in my own right  
*Evidence – your most recent letter from the Department for Work and Pensions (DWP) regarding receipt of this benefit*
- ☐ I, the student, receive Employment and Support Allowance AND Disability Living Allowance or Personal Independence Payments in my own right  
*Evidence – confirmation by the DWP of receipt of BOTH allowances*

If you have ticked any of the categories above you do not need to fill in Section 3 of this form. Please continue to Sections 4 (Bank details) and 5 (Declaration).

### Section 3: Eligibility for a Discretionary Bursary

Alderbrook will assess your eligibility for the Discretionary 16-19 Bursary in line with its own policies, available funding and your financial need. Please complete the following section as fully as you can, and ask for help if you need it. Your need will be assessed on the information you provide and there is no guarantee that you will be eligible for a Bursary or a guarantee of the level of funding you may receive.

- 3.1 Are you eligible for Free School Meals? ☐ YES ☐ NO

If Yes, please give the date of notification of eligibility.

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- 3.2 Do you, or your parents that you live with, receive any other means-tested state benefits?

*Means-tested state benefits include - Income support, Income-based Job Seeker's Allowance or Employment and Support Allowance, Support under Part VI of the Immigration and Asylum Act 1999, The Guarantee element of State Pension Credit, Child Tax Credit (not Child Benefit), Universal Credit etc. Please ask if you're not sure.*

☐ YES ☐ NO

- 3.3 If you answered YES to question 3.2 please provide evidence of the means-tested benefit. Normally, this will need to be written confirmation/benefit entitlement letter from the relevant Agency, e.g. a letter from the Local Authority confirming your eligibility for Free School Meals / a letter from the Department for Work and Pensions confirming your eligibility for Income Support. Please provide original documents which will be returned to you.

*Receipt of a means-tested benefit alone does not guarantee a Discretionary Bursary for your studies.*

- 3.4 If you answered NO to question 3.2 above, please provide further information explaining why you need financial support.
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### Section 4: Bank Account Details

To receive bursary payments, students must have a bank account in their own name that will accept BACS payments (it is not possible to make BACS payments into a Post Office account). If students do not have a bank account, they will need to apply to open one. If there is a delay in setting up a bank account that will result in further financial hardship it may be possible to make interim payments. Please see 'Payments' section on page 3 of the Policy for further details

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Full Name of Account Holder

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Name of Bank or Building Society

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Branch

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Sort code

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Account Number

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Building Society Reference / Roll No

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#### Section 5: Declaration

I confirm that I have read the 16-19 Bursary Fund Policy. I also confirm that I have read and agree to obligations outlined in the Student Handbook. I confirm the information given on the form is complete and accurate at the time of application and that I will inform Alderbrook School immediately of any change in circumstances. I understand that any attempt to dishonestly obtain a Bursary shall be treated as fraud and will be subject to disciplinary procedures. (See Section 22 Fraudulent Claims)

The person applying for the Bursary is expected to sign the declaration in all cases.

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Student's signature

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Print name

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Date

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☐ **I have the right of abode in the UK and have been resident in the UK for the last three years.**

Evidence – birth certificate OR valid passport / Right to Remain if applicable

If you have included evidence that your parent /carer is in receipt of a means-tested benefit they must also sign the declaration.

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Parent / carer signature

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Print name

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Date

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*Before sending in your application form please check to make sure that you have completed all the sections relevant to your circumstances and that you have enclosed originals of the relevant evidence*

*to support your claim. If you have not, your application will be returned to you and there will be a delay in any potential Bursary payment made.*

### Official Use Only

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Date application received

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Date application reviewed

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Approved by Assistant Headteacher i/c Sixth Form:

Date:

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Date application resubmitted (if applicable)

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Date resubmitted application reviewed (if applicable)

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### Assessment

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Vulnerable ☐ Approved ☐ Refused ☐ Not Applied For

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Discretionary ☐ Approved ☐ Refused ☐ Not Applied For

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Evidence

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Bank details



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Amount, schedule and conditions for payments

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Completed

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Date

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Date student notified

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## Appendix 2

### 16-19 Bursary Claim Form for Half Termly Expenditure

This form should be used by students who are eligible for the 16-19 Bursary. The claim should be submitted after expenditure has occurred. Students may submit a maximum of one claim each half term.

In the majority of cases, receipts should be provided. Where this is not possible, an explanation should be given.

Funds will be allocated according to the total budget available (finite amount) and **it is possible that claims will only be partially reimbursed or not at all.**

Date	Supplier	Details of Items Purchased	Amount Claimed £	Receipt Y or N
Total Claimed				

I confirm that the amounts listed above relate to legitimate expenditure incurred during my studies.

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Student Name

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Student Signature

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Date

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Please hand this completed form together with all receipts to the Sixth Form Administrator

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Approved by the Assistant Headteacher i/c Sixth Form ☐ YES ☐ NO Signature

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Approved by the Finance Director ☐ YES ☐ NO Signature

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Date

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### 16-19 Bursary Claim Form for Half Termly Expenditure Guidelines

The following types of expenditure may be claimed if receipts are provided:

- Books, equipment and other items directly required for your courses
- Business Dress costs – up to a maximum of £250 (Not 'dress down' Friday clothing items – please see Monday-Thursday Sixth Form dress code)
- Transport costs (e.g.: bus pass)
- Travel to universities for Higher Education interviews and open days
- UCAS fees
- Other - please seek approval before making a claim.

***It is important that you always seek the approval before making any purchase of a single item in excess of £100. Please direct your query via our Sixth Form Administrator.***

## Appendix 3

### Agreement with the School - Attendance, Behaviour and Effort

The 16-19 Bursary is paid on condition that students meet certain conditions. The following procedures explain what is expected from the student and the school.

#### Students are expected to:

- Attend at least 95% of lessons, Private Study periods and registrations as detailed on timetables.
- Ensure they are punctual to all lessons and register their attendance.
- Meet standards of effort, appearance and behaviour as agreed to in the Sixth Form Handbook. *If students receive an information or negative referral regarding poor behaviour or poor effort they will not be eligible for the Bursary payment that week if in receipt of the weekly bursary or if students are not paid weekly the opportunity to access bursaries in the future may be withdrawn.*
- Follow the school absence procedure.
- *It is the student's responsibility to notify the school of the reasons for any absences, preferably before they occur (in the case of driving test, medical appointments that can't be made outside of school hours etc.) or as soon as possible after the absence.*
- If a timetable changes over the course of the year and this affects the number of guided learning hours students must inform the Director of Sixth Form immediately as this may affect eligibility.

#### Alderbrook will:

- Keep records of attendance, using Lesson Monitor.
- Monitor attendance and any absence. Students will be informed of the possibility of non-payment due to unaccounted absence as the claim is submitted.
- Let students know within a reasonable time if the payment/ claim has been stopped.
- Respond to any queries or problems that students wish to discuss about the Bursary. Any disputes about non-payment should be addressed in the first instance to your Head of Year/Director of Sixth Form.

#### Getting permission for an absence (authorised absence)

It is understood that there is very occasionally a reason why students may need to apply for permission to be absent. It is up to the school to agree with this planned absence and if agreed in advance of the absence, then the Bursary payment will not be affected. Students must provide the Bursary Co-ordinator with a note in advance of this absence. The following list gives examples when a permission may be granted on a limited basis:

- Specialist medical appointment which cannot be arranged outside School hours.
- Official University/College/Employer interview or visit. Seek permission beforehand.
- Work experience placement.

- Participation in a significant extra-curricular event e.g. County/Regional sports events.
- Driving test (theory or driven) - but NOT driving lessons.
- Official Religious observance.
- Other events at the discretion of the Headteacher arranged in advance.

### Other kinds of absence (unauthorised absence)

Bursary is given on condition of at least 95% attendance. The following reasons for absence would not generally be acceptable:

- Holidays
- Part or full time work which is not part of your programme of study
- Leisure activities
- Birthdays, weddings or similar celebrations
- Babysitting younger siblings
- Shopping
- Driving lessons
- Being late
- Missed buses (except in unavoidable circumstances such as buses not turning up due to extreme weather, traffic accidents, etc.).

Where an absence genuinely could not be foreseen in advance, you should nevertheless make arrangements to tell the school/college as soon as possible on the day in question.

## Appendix 4

### What the bursary fund cannot be used for

The bursary fund is not intended to:

- provide learning support – services that institutions give to students – for example, counselling,
- mentoring or extra tutoring
- support extra-curricular activities where these are not essential to the students' study programme
- support general household incomes

Schools are not permitted to use the bursary fund in any way that would give them a competitive advantage over other institutions. Examples include:

- fees for access to facilities in the institution
- block subsidy of the canteen
- block subsidy of transport, or support for travel for all students regardless of family incomes
- block provision of equipment, material or books
- making bonus payments to reward attendance or achievement
- payments to support students' general living costs

Schools must not use the bursary as a way of incentivising attendance or as a marketing tool to encourage students to choose their institution over another.

Where Schools use non-bursary funds to provide free travel for all their students, they must make clear that this is an offer from the institution, rather than being supported via the bursary fund.