



Waterfront UTC

16 – 19 Bursary Fund

Policy Author:	Kyle Taylor - Director of Finance & Operations
Executive Policy Owner:	Kyle Taylor - Director of Finance & Operations
Approval by:	Level 3- Chief Executive
Approval Date:	July 2023
Next Review Due:	July 2024

1. Aims

Our school aims to:

- › Have clear and transparent processes for the use and allocation of 16 to 19 bursary funds
- › Make clear to parents and students the type of support which is available and the means of applying for it
- › Make clear to parents and students the attendance and behaviour conditions for receiving the funds

2. Guidance

This policy is based on advice from the Education and Skills Funding Agency (ESFA) on the <https://www.gov.uk/government/publications/16-to-19-bursary-fund-guide-2023-to-2024-academic-year>

3. Definitions

- › 'In care' is defined as: children looked after by a local authority on a voluntary basis (section 20 of the Children Act 1989) or under a care order (section 31 of the Children Act 1989)
- › 'Looked after child' is defined as: a child in the care of a local authority or who is provided with accommodation by the authority in the exercise of any functions for more than 24 hours (section 22 of the Children Act 1989)
- › 'Care leaver' is defined as:
 - A young person aged 16 and 17 who was previously looked after for a period of 13 weeks consecutively (or periods amounting to 13 weeks), which began after the age of 14 and ended after the age of 16, or
 - A young person aged 18 or above who was looked after prior to becoming 18 for a period of 13 weeks consecutively (or periods amounting to 13 weeks), which began after the age of 14 and ended after the age of 16

4. Roles and responsibilities

4.1 The Trust

The Chief Executive has overall responsibility for approving this 16 to 19 bursary fund policy

4.2 The head of school

The head of school is responsible for ensuring relevant staff are familiar with this 16 to 19 bursary fund policy, and that it is being applied consistently.

4.3 Staff

Our staff are responsible for implementing this 16 to 19 bursary fund policy consistently, with support from the Central Trust Finance Team who are ultimately responsible for ensuring financial compliance and implementation of both the eligibility process and physical payments and authorisation of evidence process

4.4 Parents

Parents are expected to notify staff or the head of school of any concerns or queries regarding this 16 to 19 bursary fund policy.

4.5 Raising Awareness

Waterfront UTC aims to raise awareness of the bursary to ensure it reaches those students in sixth form who would benefit from receiving a bursary. The school commit to:

- Making prospective pupils and parents aware of the bursary on open days
- Posting information about the bursary on the school website and appending posters around the sixth form area
- Providing all sixth form students with access to the bursary policy and application form. Ensuring the Head of Sixth form/ sixth form team are available (by appointment) to discuss with any students who have questions or need support in completing an application
- The Head of Sixth form will ensure that sixth form tutors are aware of the policy, to ensure they will promote it to their tutor groups. Additionally, they will ensure that the pastoral team are aware of the policy and application process to allow pastoral staff to flag/ identify students in sixth form who may benefit from the a bursary and be eligible to receive it.
- The School will use the evidence available to them to signpost particular groups of students to the Bursary to ensure they are aware of the Bursary policy, this in particular will include students who are or have previously been entitled to Free School Meals and students who are looked after or former looked after children and students for whom the school have received pupil premium for.

5. How we use the bursary fund

Financial support is available to eligible students from the 16 to 19 bursary fund. See section 6 below for details of our eligibility criteria.

The fund is intended to support students, aged 16 to 19, in overcoming specific financial barriers to participation so they can remain in education.

There are 2 types of 16 to 19 bursaries:

- › Bursaries for defined vulnerable groups; and
- › Discretionary bursaries

We use the fund to provide students with support to fund:

- › Transport
- › Books
- › Equipment (Including a laptop which must be returned at the end of the students' studies)
- › Uniform – in line with the 6th form dress code
- › Field trips and other course-related costs
- › The costs of attending university interviews and open days
- › Emergency meal support for individual cases of severe hardship to provide meal support on the days a student attends their study programme. There are no additional checks needed under this point.

In line with the Bursary guidance the School/Trust will retain 5% of the bursary funding within the schools budget to recoup the administration costs of delivery the policy.

6. Eligibility criteria for the 16 to 19 bursaries

6.1 Age

To be eligible for either bursary in the 2023 to 2024 academic year, students must be at least 16 years old but under 19 years old on 31 August 2023. Where a student turns 19 within the academic year and is still attending Waterfront UTC for their Education they will continue to be eligible until the end of the academic year.

Students aged 19 or over are eligible only for a discretionary bursary if they:

- › Are continuing on a study programme or course which they began when they were aged 16 to 18 years old, or
- › Have an education, health and care (EHC) plan

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

In exceptional circumstances, where students under 16 years old are on a funded 16 to 19 study programme at our school, we may use our discretion to pay bursaries to these younger students. However, if these students are enrolled at another institution that receives public funding for them, they will not be eligible for bursary funding.

The school/ Trust will use the eligibility checklist to ensure students are eligible to receive the bursary [https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1145246/16 to 19 Bursary checklist.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1145246/16_to_19_Bursary_checklist.pdf)

6.2 Eligible education provision

Waterfront UTC sixth form provision is funded by the ESFA and therefore it is an eligible education provision.

6.3 Residency

Students must meet the residency criteria in the [ESFA funding regulations for post-16 provision](#).

6.4 Asylum seekers

Accompanied asylum seekers under 18 with an adult relative or partner and asylum seekers aged 18 and above are entitled to education but are not entitled to public funds. If necessary, they can apply to the Home Office for suitable housing and cash for essentials.

We will provide in-kind support such as books, equipment and a travel pass to asylum seekers who have not had asylum refused.

Unaccompanied asylum-seeking children:

- › Are the responsibility of the local authority;
- › Are to be treated as 'looked after' children; and
- › Are eligible for a bursary for vulnerable groups, where they have a financial need

When these students reach 18 years old, we will consider their immigration status. They will still be eligible for a bursary as a student from a defined vulnerable group if the asylum claim is in their favour and will be treated as a 'care leaver' until they reach the upper age limit.

6.5 Bursaries for young people in defined vulnerable groups

Students with a financial need, who meet one of the following 4 criteria below, in addition to the criteria outlined in sections 6.1, 6.2 and 6.3 above, can apply for a bursary for vulnerable groups.

The defined vulnerable groups are students who are:

- › In care (NB: those who are privately fostered are not classed as looked after);
- › Care leavers;
- › 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; or
- › Receiving Disability Living Allowance (DLA) or Personal Independence Payments (PIPs) in their own right as well as Employment and Support Allowance (ESA) or UC in their own right

UC has now replaced IS, as well as other benefits above, for current and future young people aged 16 to 18. However, students aged 19 to 25 and funded from the 16 to 19 budget (19+ continuers and students with an EHC plan) may still receive the legacy benefits listed above.

Students who meet the criteria for a bursary for vulnerable groups are not automatically entitled to a bursary. Students will not receive the bursary if they do not have any actual financial need (for example, because their financial needs are met from other sources and/or because they have no relevant costs).

Where a bursary is provided, the funds will generally be up to £1,200 per year for study programmes lasting 30 weeks or more. When calculating the amount, cases will be looked at individually and base the outcome based on a particular student's needs. Students will only receive the amount they actually need to participate and will not automatically receive £1,200 if they do not need the full amount.

We can use our discretion, on a case-by-case basis, and provide more than £1,200 per year if such would be necessary in all the circumstances for the student to remain in education. Any such additional payment will be paid either from our discretionary bursary allocation or our own funds.

If a student's study programme lasts for less than 30 weeks, they will be paid a pro-rata amount. We will also consider the number of hours involved in a student's study programme when deciding whether a pro-rata payment is more appropriate.

We will review the student's eligibility position each academic year. Students will only continue to receive a bursary for vulnerable groups if they continue to satisfy the criteria.

We will provide this support for students from the bursary fund by making payments in kind where possible. It will not be provided it as regular payments for living costs.

6.6 Discretionary bursaries

In addition to the criteria outlined in sections 6.1, 6.2 and 6.3 above, students can apply for a discretionary bursary if they satisfy one or more of the following criteria:

- Gross household income needs to be below £28,000 per year or
- The student or their family is in receipt of benefits

Students who do not satisfy any of the criteria listed in this section, but who are able to demonstrate financial hardship arising from other reasons, may apply for a discretionary bursary.

In assessing any application for a discretionary bursary, we will consider:

- › Level of household income
- › Distance to travel between the student's home and the school
- › The requirements of their study programme
- › Whether the student has additional responsibilities that may mean they need extra help

The guidance provides no set limit on the amount of discretionary bursary that can be awarded to students, however the school will generally set the maximum at £2,000, unless there are exceptional circumstances arising from the individual assessment of a student's bursary application. We will base all decisions around which students receive a discretionary bursary, and how much bursary they receive, on each student's individual circumstances and their actual financial need.

We will review the student's eligibility position each academic year. Students will only continue to receive a discretionary bursary if they continue to satisfy the criteria.

6.7 Evidence

All applications for 16 to 19 bursaries must be supported by appropriate evidence. Examples of acceptable evidence we may request are:

- › A copy of the UC or IS award notice, in the student's name
- › Documents such as a tenancy agreement in the student's name, a child benefit receipt, birth certificate or utility bills

- › Written confirmation of the student's current or previous looked-after status from the relevant local authority
- › A copy of the UC claim from Department of Work and Pensions

7. Application and payment process

7.1 Applications

Applications should ideally be submitted by the end of September to allow enough time for our school to assess the overall level of demand and make discretionary awards on a fair basis. This date will be clearly stated on the application form.

However, we acknowledge that students' circumstances may change and therefore the application process will remain open for the whole school year.

Applicants will be notified in writing via email as to whether their application has been successful, together with the amount of funding awarded. If a student wishes to appeal the outcome of their application for a bursary, they must follow the school's complaints procedure.

Applications can only be considered if completed on the application form (found at the end of this document) will appropriate supporting evidence. We are students to ensure the form is completed fully, and evidence provided in full to ensure we can assess the application as quickly as possible to ensure a swift commencement of any bursary payments

7.2 Payment process

Payments are made using the following process:

- › BACS payments are made to students bank accounts, we are not permitted to pay the funds from Bursaries into parent or carer bank account.
- › Where possible the school will assess the pupils level of support required from the bursary and look at associated evidence provided e.g. evidence of the cost of a monthly bus pass. The school will individually assess the pupils case to determine a set monthly payment for that individual. For students who do not need support with a set monthly eligible cost, this option will not be available as we do not make fixed payments unless the results of the individual assessment show this is required for that particular student.
 - The individual will be required to provide evidence in the form of receipts or invoices, for the first two months of the Bursary
 - Following this payments are made linked to attendance, but the school reserves the right to stop or pause payments should they suspect funds are not being used for intended purposes
- › Students may receive payment in kind, upon production of receipts for items agreed, where the expenditure is not a regular monthly cost.

Please note that as part of our checks to prevent fraud a member of the central finance team will need to call the student to confirm that the bank details on the application form are theirs and have not been amended by anyone else. Students who are vulnerable may ask the Sixth Form team to join them for this short conversation. We are unable to make payment until details have been confirmed.

7.3 Conditions for the receipt of bursary payments

Payments of the bursary are conditional on students meeting the following conditions in relation to their standards of attendance and behaviour:

- › Attendance at or above 92% [subject to exceptional circumstances]
- › Following The Howard School's Sixth Form code of conduct
- › Following The Howard Schools Behaviour policy

All students are required to sign a declaration confirming that they agree to these conditions.

Students who fail to meet these conditions may have their payment withheld, but we will always take students' individual circumstances into consideration. This includes considering the impact on attendance that might be caused by illness, caring responsibilities or other exceptional circumstances.

We will stop payments where students have been absent for a period of 4 continuous weeks or more (excluding holidays) and where students have decided to withdraw from a study programme.

We reserve the right to reclaim money from students where it is not spent for the reasons it was awarded and by signing the declaration students agree to pay back any money where it has not been spent for the intended reason.

We will consider the impact of such an action on the individual student before taking a final decision to do so, and any decision will be confirmed to the student in writing.

The School may specify that students return any books and equipment purchased for them through the bursary, such as a laptop, at the end of their study programme for use by other students. This will be clearly communicated to students and their parents upon confirming eligibility for the bursary.

8. Change in circumstances

If there are changes in circumstances, which may affect eligibility for a bursary, applicants and/or parents/carers must notify the school without delay.

9. Record keeping

Any paperwork and documents we retain for audit purposes (for example, copies of application forms, documents as evidence and any agreements signed by students) will be kept securely in line with our data protection policy, privacy notices and record retention schedule. These are available on request.

APPLICATION FOR 16-19 BURSARY FUNDING

Academic Year 2023-24

Application Process

Eligibility will be determined via formal application process. You must ensure that all questions on the application form are answered clearly and attach relevant supporting documents (copies are preferable. If you provide originals that you require back please make this clear on your application).

Please return your completed form and supporting evidence **by Friday 8th September 2023** to:

[Insert school contact]

The School will aim to process the information within 10 school days following the deadline, and will inform you in writing, of the outcome.

All eligible payments will be subject to compliance with the School Code of Conduct, Attendance Policy and adherence to subject work deadlines.

All bursary payments will be issued by **BACS Payment** to the **students account**. All queries should be brought to the attention of the Head of Sixth Form in the first instance.

Please complete all information in BLOCK capitals:

Surname: _____

Forename: _____

Date of Birth: _____

Year and Form: _____

Present Address: Postcode: Home Telephone No: Parent Mobile No:	Previous address (if moved in last 12 months): Postcode: Home Telephone No:
Student Mobile:	
Student Email:	

Details of Parents/Carers of applicant:

Surname	Forename(s)	Single/Married/Living with partner

Details of other Dependents in the family home:

Name	Date of Birth	Are they in full time education/training? <i>(Yes or No)</i>

Please answer the following questions in support of your application.

(Questions 1 – 4)

1. Are you a young person in care?	Yes	No
2. Are you a young carer?	Yes	No
3. Are you a young person in receipt of income support?	Yes	No
4. Are you a disabled young person in receipt of employment and support allowance who are also in receipt of disability living allowance?	Yes	No

If you answered YES to question 3 or 4 please attach evidence with your application form

5. Are you eligible for free school meals?	Yes	No
Please confirm that the school meal service will be used and state the cost per day claimed	£	

6. Do you require support for Transport Costs?	Yes	No
<p>Please provide details of these requirements and approximate costs with evidence where possible. You are required to submit evidence of the costs for this section. For instance if you need support with a bus pass you should include a screenshot of the monthly cost of the bus pass/ ticket you will need.</p>		
7. Other assistance required	Yes	No
<p>Please specify precisely the assistance required, including cost, and detail what educational benefit will be gained)</p>		

Financial Information (to be completed by Parent/Carer)

*Eligibility will be determined where the joint parental income is no more than **£28,000** per annum
As this is a means tested grant, proof of your financial circumstances will be required. Applications received without evidence **will not** be processed*

Income from Employment

Gross Salary/Wage	£	Per week/month/year
Occupation (Please state if Unemployed)		

Gross Salary/Wage of Spouse/Partner	£	Per week/month/year
Occupation (Please state if Unemployed)		

Other Income

Job Seekers Allowance	£	Per week/month/year
Income Support	£	Per week/month/year
Child Benefit	£	Per week/month/year
Working Families Tax Credit	£	Per week/month/year
Maintenance Payments	£	Per week/month/year
Disability/Incapacity Benefit	£	Per week/month/year
Other Income (Please specify)	£	Per week/month/year
Total	£	

***Please supply evidence of your household income. Evidence may include:**

- **P60**
- **Receipt of Benefit Notification,**
- **Tax Credit Award Notification**
- **Self Employed Income Notification.**

**Payment Information for BACS – Please complete in BLOCK CAPITALS.
This must be the students own bank account.**

Name:	
Address:	

Bank Name:	
Account Number:	
Sort Code:	
Ref:	<i>The Howard Academy Trust</i>
Email address for Remittance Advice:	

Document Checklist

You must supply all relevant documents with your application. Please confirm which information is enclosed. For auditing purposes, we must keep all the supporting documentation with your application. Where possible please supply copies *not* original documents.

Please Tick Appropriate Column:

Supporting Documentation:	Copy	Original
1.		
2.		
3.		
4.		
5.		
6.		

DECLARATION:

I/We certify that the information given on this form is correct to the best of my/our knowledge and belief. I/We understand that all information given may be checked with the Benefits

Agency or HM Revenue and Customs and that the submission of incorrect information may result in legal action.

I/We undertake to inform the Finance Department immediately should there be any changes to the details given and understand that the information may be checked with the Benefits Agency or HM Revenue and Customs and that the submission of incorrect information may result in legal action.

Signature of Applicant:

Date:

Signature of Parent/Carer:

Date:

FOR OFFICE USE ONLY

Evidence seen by:

Funding Approved:

Funding Declined:

PLEASE RETURN THE COMPLETED APPLICATION FORM TOGETHER WITH EVIDENCE OF BENEFIT (where appropriate)