



## **16-19 Bursary Fund Policy**

### **Terms of Reference**

This policy has been written in conjunction with the “16 to 19 Bursary Fund guide: 2021 to 2022 academic year” which is produced by the Education and Skills Funding Agency (ESFA) and can be accessed on the following website:

<https://www.gov.uk/guidance/16-to-19-bursary-fund-guide-2021-to-2022-academic-year>

### **General**

1. This policy sets out the arrangements for administering the ESFA 16-19 Bursary Fund allocation to Montsaye Academy.
2. The policy will be reviewed each academic year as new guidance is issued by the ESFA. Montsaye Academy cannot guarantee that individuals supported under this fund in 2021-22 will continue to be funded in 2022-23, or funded to the same extent.
3. The Fund is administered in accordance with the ESFA 16-19 Bursary Fund Guidance for 2021-22, which provides full details of the scheme.
4. Receipt of a bursary is conditional on the student meeting all expectations set by the school, in particular with regards to attendance, punctuality, behaviour and academic achievement. Failure to comply could result in part of the bursary award being withheld. All students will sign a Learning Agreement at the start of the academic year, which must be complied with.
5. Montsaye Academy will not discriminate against students on the basis of any protected characteristic as defined in current equalities legislation.
6. Montsaye Academy will make every effort to publicise the scheme and will adopt an application process which is clear and transparent.
7. The Academy will retain a small contingency to cover the cost of bursaries awarded throughout the academic year due to possible changes in the financial or domestic circumstances of individual students.
8. In exceptional circumstances, the Academy will consider “one off” applications from students who do not meet standard eligibility criteria.
9. The scheme will be administered by Sixth Form Staff at Montsaye Academy.

## What is the 16-19 Bursary Fund?

This Fund is allocated to individual schools and colleges that offer a Post 16 provision. The Fund is intended to help support those young people who face the greatest barriers to continuing in education or training Post-16.

Payments will usually be made directly into student's bank accounts, although "in kind" payments may occasionally be made, e.g. payment for a school trip or specific equipment.

## Who is eligible for a bursary?

To be eligible to receive a bursary in the 2021-22 academic year a student must be aged 16 or over but under 19 at 31<sup>st</sup> August 2021. 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 or have an Education, Health and Care Plan (EHCP)

Students must meet the residency criteria in ESFA funding regulations for post-16 provision in the 2021-22 academic year. They must be participating in provision that is subject to inspection by a public body that assures quality (Ofsted) and is funded by the ESFA, the European Social Fund or otherwise publicly funded. They must be working towards a qualification (up to and including level 3) that is accredited by Ofqual or is pursuant to Section 96 of the Learning and Skills Act 2000.

There are two types of bursary that a student may be eligible for; a **vulnerable groups bursary** or a **discretionary bursary**. Vulnerable group students are considered high priority. Discretionary bursary students are considered either medium or low priority.

### Vulnerable groups bursary – High Priority Group

This is a bursary with a maximum value of £1,200, which is available to support young people in nominated vulnerable groups. This amount is drawn down from the ESFA, and is separate to the funds available for discretionary bursary students. Students should only receive the amount they actually need to participate and institutions should not automatically award £1,200 if they do not need the full amount.

The defined vulnerable groups are as follows:

- Students who are in care
- Students who are care leavers
- Students who receive Income Support or Universal Credit 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
- Students who receive 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.

Proof of entitlement (original documentation) will be required and copies will be kept securely on file.

The payment of the vulnerable groups bursary will be paid by BACS direct to the young person's bank account in the following months:

- October 2021
- January 2022
- April 2022

In some circumstances, a proportion of the full award may be paid "in kind", for example, payment towards a school trip.

The ESFA recommends that it should be made clear in this policy that there is the possibility of no or a limited award for the vulnerable groups bursary. Meeting the criteria for a vulnerable groups bursary does not automatically mean that funding will be given. Montsaye Academy needs to consider the circumstances of each student on a case-by-case basis. We will assess whether no bursary should be awarded (because the student has no financial need) or to award a reduced amount (because the financial help needed is limited).

### **Discretionary bursary**

This bursary is intended to support students from lower income families as they complete Post 16 education. Discretionary bursaries are intended to provide support with the costs of remaining in full time education e.g. transport, books and equipment, school meals, travel to open days and other course-related costs such as study visits.

The bursary fund is not intended to support extra-curricular activities where these are not essential to the students' study programme.

The fund allocated to Montsaye Academy is a fixed and finite sum and allocations may therefore not exceed the total sum available. It may not be possible to support every application and so priority will be given to those students from families with the lowest household income and/or highest demonstrated need. **The amounts paid will be subject to the number of students in the category and the availability of funds.**

### **Medium Priority Group**

This is for students who fall into the following category:

- The student is eligible for a free school meal and/or is classed as Pupil Premium or
- The gross annual household income is below £20,000

Proof of entitlement i.e. confirmation from the Local Authority of entitlement to free school meals will be required, along with evidence of receipt of benefits/low income within the household. Copies of all documentation will be kept securely on file.

The payment of the discretionary bursary will be paid by BACS directly to the young person's bank account in instalments. In some circumstances, a proportion of the full award may be paid "in kind", for example, payment towards a school trip.

## Lower Priority Group

In the event of funds remaining within the Academy's Bursary Fund allocation once all medium priority awards have been allocated, awards may be made to the following applicants:

- Students of families with an annual household income of between £20,000 and £25,000

Proof of low-income entitlement (original documentation) will be required and copies of all documentation will be kept securely on file. Evidence could be 3-6 months bank statements, wage slips or P60.

Eligible students in this group may apply to the 16-19 Bursary for a contribution toward items such as the cost of transport, essential course equipment or materials, trips, costs incurred with attending open days and UCAS fees. This could be a one-off payment for a specific item or a cash bursary for support, dependent upon need.

The payment of the discretionary bursary to medium and low priority groups will be paid by BACS direct to the young person's bank account in the following instalments:

- Payment 1                      October 2021
- Payment 2                      December 2021
- Payment 3                      February 2022
- Payment 4                      April 2022
- Payment 5                      May 2022

## The Application Process

All students joining or continuing with the Sixth Form at the start of September will be given information about the Bursary. Copies of all documentation and the application form can be found on the school website, and can be collected from Mrs McNish, Sixth Form Centre Manager. Applications for an award of a bursary must be made on the appropriate application form.

All applications will be reviewed by sixth form staff at the earliest opportunity. Applications will be considered alongside this bursary policy, and the Checklist produced by the ESFA. Once all applications have been received and reviewed, a decision will be made about the success of each application and the nature and value of support that will be provided. The available funds are limited and the Academy must target funds to the students with the greatest needs. Eligibility cannot therefore guarantee an award.

For vulnerable group bursary applicants (high priority) we will need original documentation setting out the benefits received, or written confirmation of their current or previous looked after status from the Local Authority which looks after them.

For discretionary bursary applicants (medium priority) we will check the list provided by the Local Authority which confirms which students are eligible for Free School Meals, and are therefore eligible for the bursary. Proof of household income will also need to be submitted.

For discretionary bursary applicants (low priority) the assessment process is likely to take longer as proof of eligibility will be required. We will seek proof of eligibility once all medium priority students have been awarded their bursary. The type of evidence required in order to verify household

income could include a Universal Credit award notice, P60s, evidence of self-employed income or bank statements.

Details of all successful applications will be passed to the Finance Department, together with the amount, timing and conditions of the bursary awarded. Applicants and their parents will be notified in writing whether or not their application has been successful. The letter will set out the full details of the award, and the conditions attached to it.

If a family's financial circumstances change during the year, meaning a student is no longer eligible, the bursary may be withdrawn.

## **Appeals Procedure**

If any young person or their parent / carer are not satisfied with the outcome of their application, they should write to the Principal outlining their reasons why. Two of the following will consider the appeal:

- Principal
- Senior Vice Principal
- Business Manager

The Academy will aim to consider and respond to appeals within **two weeks** of receipt. If the appeal is upheld or partly upheld, it will be referred back to the Assistant Principal with responsibility for the Sixth Form with recommendations.

If the appeal is not upheld the appealing party will be directed to the Academy's Complaint Procedure.

## **Fraudulent Claims**

Where an application is found on investigation to have been made based on false information, payment may be discontinued. The individual concerned may be subject to disciplinary action and possible referral to external authorities. Montsaye Academy may seek to recover any funds or goods obtained.