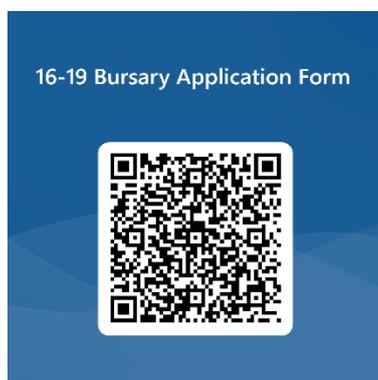




# Policy on Bursary / Discretionary Fund for 16 – 19 year olds

<b>Committee ownership for this policy:</b> F&P, Curr, Incl, Prem, RR6, FGB	RR6
<b>Must be approved by FGB: Y / N</b>	N
<b>Required by:</b>	Governing Body
<b>Frequency of review:</b>	Annually
<b>Date last reviewed:</b>	Autumn 2023
<b>Date of next review:</b>	Autumn 2025
<b>Display on website: Y / N</b>	Y
<b>Responsible</b>	Headteacher Rutlish & Headteacher Ricards Lodge
<b>This policy will be subject to ongoing review and may be amended prior to the scheduled date of next review in order to reflect changes in legislation, where appropriate.</b>	



## 1. Overview 16 - 19 Bursary Fund and how is it managed across RR6

**Aims:** The 16 to 19 Bursary Fund is made available by the government to provide financial support to help students overcome the specific financial barriers to participation they face so they can remain in education after the age of 16.

- The sixth form receives a set amount of Discretionary Bursary funding each year and can apply for additional Funding for students who meet the criteria for the Vulnerability Bursary.
- This may mean that eligible students do not receive the same amount of financial support each year, depending on the number of applicants and differing levels of need.
- The amount will be dependent on application evidence.
- Wherever possible, students will receive the bursary in kind. For example, textbooks and travel tickets will be purchased for the student by the sixth form. If this is not possible, students will be reimbursed into their personal bank account when evidence of necessary expenditure has been provided e.g. students must ensure all receipts are retained.
- Most students will purchase resources at the start of the school year but in-year requests will be considered in line with course requirements.
- Each school in RR6 is permitted to use up to 5% of their school bursary fund allocation for administrative costs relating to the 16-19 Bursary Fund.
- RR6 schools will use the 16-19 Bursary Checklist, provided by the EFA when assessing applications for support from the 16-19 Bursary Fund.
- **Each school will assign a committee for the administration of the fund.** The makeup will include a member of the sixth form leadership team, a finance representative and one other member of the senior leadership team. This group will meet at least three times a year to review the policy and procedures, make updates in line with DFE guidance, ensure compliance and review and agree fair practice. This group may meet more frequently when there are issues that need to be resolved.
- The committee will report annually to the RR6 Governors subcommittee and the Finance and Resources subcommittee of the respective schools Rutlish and Ricards Lodge.
- The financial risk will be held by each school separately for the administration of the Post 16 Bursary to their own students. Auditing of the fund will be undertaken in the usual auditing process for each school.

## 2. What can the Bursary Fund be used for?

- Books, equipment, art materials or stationery
- Cost of transport to visit a university or travel required as part of a course e.g. trip
- Laptop or IT software for a course - students who do not own a laptop are able to borrow a school laptop during the school day.
- Protective/specialist clothing to meet the school dress code or course requirements.
- Students who qualify for a Bursary will receive financial support for any compulsory trip required by the examination board specification, e.g. Geography field trip.

**3. Types of Bursary:** There are 2 types of 16 to 19 bursary

### 3.1 Vulnerable Bursary

Students who are in one of the groups detailed below are eligible to apply for a vulnerable bursary of up to £1200 (e.g. up to £200 per half term). The defined vulnerable groups, as defined by the Government, are students who are:

- in care
- 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
- 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
- Rutlish and Ricards Lodge will draw down funds for the vulnerable groups separately, whenever they identify and verify new students who meet the criteria. This can be done at any point in the year when a student becomes eligible. To do this school business managers/finance managers access the SBSS online portal.

Students will be required to provide Ricards Lodge and Rutlish School with proof of eligibility to meet the criteria for this bursary application to be considered.

### 3.2 Discretionary Bursary

Ricards Lodge and Rutlish School can award discretionary bursaries to students who have a financial need and this will be awarded based on individual circumstances.

**Discretionary Bursary 1:** if are entitled to **Free School Meals** (annual household income of £16,190 or less), students qualify for a Band 1 discretionary bursary

**Discretionary Bursary 2:** students who have a total household income of **between £16,190 and £25,000**.

## 4. Eligibility

RR6 must ensure that our funding reaches those students most in need of financial support.

- To be eligible for a bursary in the academic year, students must be aged 16 or over at 31st August 2023.
- Students aged 19 or over are only eligible to receive a discretionary bursary if they are continuing a study programme, they began aged 16 to 18 (19+ continuers) or have an Education, Health and Care Plan (EHCP).
- Eligibility for both the Vulnerable and Discretionary Bursary is determined by both household income and financial need. Supporting evidence is required for both types of bursary.
- Students must satisfy the government criteria for residency and proof of identity (passport) must be provided.
- The residency criteria set out by the EFA explains that, in order to be eligible, a person needs to be settled in the UK on 1st September and has been resident in the UK for the three years preceding the 1st September.
- Please be aware that there is a finite amount of bursary funding for the school to allocate.
- Making an application does not guarantee bursary support.

## 5. Application process

### 5.1 At the start of the Year 12

- Deadline for initial applications is 9 October 2023.
- Use the online application form for your registered school [appendix 1]
- All applications completed online for sixth form administrator for each respective RR6 site to check
- Where a student has a change of circumstance in-year they should alert their Head of Year as soon as possible.
- If students are already registered for Free school meals no further evidence is required.
- If students are not entitled to free school meals but the total household income is between £16,190 and £25,00 they will need to provide documentary evidence.
- Photocopies will be taken of the documentation which can be returned.
- Applications can be made throughout the year if financial circumstances change.
- Applications will be processed as quickly as possible but may take up to two weeks.
- The outcome of each application including the amount awarded will be shared with the applicant in writing.

## 5.2 At the start of Year 13

- Students in Y13 must complete a self-declaration form to confirm that since starting Post 16 education their household circumstances have not changed.

## 6. Evidence of Household Income

All applications to access the 16-19 Bursary Fund must be supported by appropriate evidence. Guidance for has confirmed that the DFE 'have decided to relax this requirement for the academic year so that the bursary fund rule is consistent with that for **free meals** in further education'.

RR6 will keep the bursary policies under review to ensure we continue to provide support to students who need it. The Dfe guidance states: - "For example, students from households being supported via lower income jobs could be in more financial need than a student in receipt of free school meals or where the family receives other benefits. An assessment of individual need should help to identify whether they are struggling to afford the books and equipment they need or to cover their essential travel costs."

- Evidence used to support an application should be the most recent and up to date documentation available.
- Students in Y13 must complete a **self-declaration form** to confirm that since starting Post 16 education their household circumstances have not changed.
  - 'Current eligibility for free meals only requires a single check of household income for each phase of education (Primary, Secondary or 16 to 19).
  - In making decisions about bursary awards, institutions can now exercise discretion as to whether they carry out checks annually or just once at the beginning of a student's study programme.
  - If an institution decides not to carry out annual checks of bursary fund eligibility, it must ensure a signed and dated (hard copy or electronic) self-declaration form is obtained from the student to confirm that their household circumstances have not changed'. 2.2 DFE Guidance
- Original documents need to be submitted and the school will take photocopies and return the originals.
  - For those submitting universal credit award letters, online print outs will be accepted as original copies.
  - Types of valid evidence of income include:
    - Universal Credit
    - Working Tax Credit
    - Child Tax Credit
    - Child Benefit
    - Income support
    - Job Seekers' Allowance
    - Disability Living Allowance
    - Personal Independent Payment (PIP)
    - Child support/maintenance payments
    - Employment (most recent P60)
    - Self-employed (latest filed accounts)
    - Other sources of income (e.g. property, shares...)
  - All adults in the household must provide the most recent financial evidence of their income.
  - All evidence should enable the school to reliably calculate the household's total annual income so sufficient documents must be provided.
  - Each case will be considered individually and further information may be required to support the application.
  - Any exceptions that are made are based on individual needs.
  - Universal Credit evidence. RR6 will use the DFE guidance in calculating the household income of an applicant who is in receipt of Universal Credit or other benefits.

## 7. Privacy

Applications will be treated with the strictest of confidence and any information provided will be destroyed after 7 years as per financial retention guidelines.

## 8. How much do students receive?

The amount will be dependent on two factors 1) the funds allocated from the Education Funding Agency to the school 2) The type of bursary the student qualifies for.

The Bursary fund is intended to help students with the **essential costs** of participating in their study programme. This includes; books, equipment, travel, specialist clothing for a course. It is not intended to support living costs.

*“No student should automatically be awarded a set amount of funding without an assessment of the level of actual financial need they have.*

*Institutions must ensure they have a clear and accessible policy or statement setting out how they will use their bursary fund, the eligibility criteria they use and any terms and conditions they set.” 2.4 DFE Guidance*

## **9. Payments**

Once funding is approved, transfers will be made via BACS directly into the students' own bank account, provided they meet the criteria set out in the above contract.

## **10. Appeals**

Any student who wishes to appeal decisions regarding their bursary application should make this in writing, within one calendar month of the decision, to the Head of Sixth Form at the students' school.

## **11. Fraud**

Fraudulent applications and supporting evidence will be referred to the police. Any payments and resources received will need to be returned to the sixth form and may result in a permanent exclusion.

## **12. Conditions for receiving bursary funding**

At RR6 we make payments for both the bursary for vulnerable groups and the discretionary bursary conditional on the student meeting agreed standards of attendance and behavior.

- If a student's attendance drops below 90% they will no longer be eligible to access the bursary funds.
- If a student's behavior is affecting the success of other students, they will no longer be eligible for the bursary funds.
- Illness and caring responsibilities and other exceptional circumstances will be accounted for in our decision.
- We retain the right to keep equipment bought for bursary students on site.

## **13. Complaints and appeals**

Any student or parent who is unhappy with how RR6 schools have managed the application for bursary funding should follow the institution's own complaints procedure for Ricards Lodge or Rutlish School respectively.

## **14. Exceptions**

The guidance to school allows the following exceptions

### **14.1 Emergency Food**

RR6 staff can use the bursary fund in individual cases of severe hardship, to provide food support whilst a student attends their study programme, for a student they consider to be in real need, without undertaking the checks on household income or gathering other evidence that would normally be required. We expect this to only apply to a very small number of the total 16 to 19 student cohort.

For audit purposes, RR6 must retain a copy of:

- a record of the number of students supported in this way
- the number of days this support is given
- the £'s value of support given to each student along with the rationale for the food support
- the signed confirmation of receipt of funding by the student, if actual spend receipts are not obtained
- The DfE does not expect this arrangement to continue on an ongoing basis for any individual student - RR6 will exercise discretion in each case and will be mindful that this flexibility relates to food support only and not the cost of living.