



**Belper School & Sixth Form Centre**

**Policy and Procedures for the 16-19 Bursary Fund**

**From September 2019**

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## **Policy and Procedures for the 16-19 Bursary Fund**

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## Belper School & Sixth Form Centre

### 1. Introduction

The [16-19 Bursary](#) replaces the Education Maintenance Allowance (EMA), and is to help the most vulnerable young people aged 16 to 19 to participate in full-time education or training.

The aim of this document is to provide outline principles to which Belper School & Sixth Form Centre will adhere to in administering the 16-19 bursary fund to ensure that learners accessing learning post 16 experiencing financial hardship receive appropriate support. It may typically be used for:

1. Transport
2. Books and Equipment
3. Hardship Costs
4. Additional Course Costs
5. Other discretionary areas

This document should be read in conjunction with the EFA guidance [16 to 19 Bursary Fund](#)

### 2. Policy Aims

- 2.1 To ensure that the 16-19 Bursary Fund is administered in accordance with EFA guidelines and policies.
- 2.2 To explain the roles and responsibilities of staff and students.
- 2.3 To explain the procedure for making applications
- 2.4 To explain the appeals procedure.
- 2.5 To ensure that the Governing body receives appropriate reports on the administration of the 16-19 Bursary Fund

### 3. Criteria and Eligibility for the 16-19 Bursary Fund:

Belper School and Sixth Form Centre has been allocated a fixed sum of money for the 16-19 Bursary Fund. 5% of the total cost will contribute towards Centre administrative costs, while a 10% contingency will be held back in the first instance for applications during the course of the year (i.e. after the "Window 1" application deadline 20<sup>th</sup> Oct 2018). The remaining 85% will be prioritised and allocated as follows:

The 16-19 Bursary has two elements to the funding:-

**3.1. Vulnerable Bursary Awards** of £1,200 per year to 'vulnerable' young people in the following groups (pro-rata for courses lasting less than 30 weeks a year) and meeting the student "Commitment Condition" stated below in Step 3.

- you're in or recently left local authority care
- you get Income Support or Universal Credit because you're financially supporting yourself
- you get Disability Living Allowance (DLA) in your name and either Employment and Support Allowance (ESA) or Universal Credit
- you get Personal Independence Payment (PIP) in your name and either ESA or Universal Credit

**NB. Evidence will be required by the school.** Applications for Vulnerable Bursary's are made through the Student Bursary Support Service as part of the EFA.

**3.2. Discretionary Awards** targeted at young people outside of the 'vulnerable' groups identified above and who are facing financial barriers to participation.

Belper School & Sixth Form Centre will be able to distribute the rest of the money to support any student who faces financial barriers to participation in education, such as costs of transport, food or equipment. Belper School & Sixth Form Centre will have the freedom to decide the scale of the bursaries, whether to pay weekly, monthly or annually, and how to link it to behaviour or attendance.

#### 4. Criteria for Discretionary Awards

The sum allocated to the School will be allocated in the following way:

**Step 1:** Eligible learners can apply for 16-19 Bursary up to a maximum of **£600** to provide funds for essential course materials, equipment and Transport funding. Payments are to be made across all course and programme areas for people aged 16-19.

Priority will be given to students who fall within the 3 Tiers below:

The Payment levels are to be assessed for each eligible learner using the Gross Household and Learner Income Bands identified below.

- **Student Tier A** – students who have successfully claimed Free School Meals for the current or previous academic year.
- **Student Tier B** – Students whose household income is less than £21,000 (based on former EMA threshold)  
Evidence : Working tax Credit annual statement letter from HMRC
- **Student Tier C** – Students whose household income is less than £26,000 (based on former EMA threshold)  
Evidence : Working tax Credit annual statement letter from HMRC

Each Tier then has a specific weighting multiple for a share of this residual fund – see below:

**Step 2:** The size of maximum payment depends upon the Student Tier and number of applicants.

Tier	Weighting Multiple	No. of eligible students
A	4	a
B	2	b
C	1	c

The Student Tier C funding amount is the baseline and is arrived by calculating:

$$\frac{\text{Total residual funding}}{(4a + 2b + 1c)}$$

From this amount Student Tier A and Student Tier B can be calculated.

Student Tier B funding value = £2C

Student Tier A funding value = £4C

## **Additional Student Requests**

If a student is facing additional financial difficulties that are providing a barrier to their education and they fall outside of the above 3 tiers they can apply accordingly but will be asked to provide supporting evidence in order to validate their application and circumstances. Decisions will be dealt with on an individual basis and come from the funds not allocated to the Tiers above. **As a guide applications in this category would not usually apply where household income exceeds £31,000.** In addition to household income, the school may consider other factors, e.g. distance to travel from the institution, the number of dependent children in the household or whether the young person has additional responsibilities that may mean they need extra help, for example, they are a young carer or a parent.

### **Step 3: Commitment Condition**

Students will be reviewed termly re their attendance at pre set dates. In order for each payment to be authorised, students must have a 90% authorised attendance during the review period or since the start of the course (if term 1). Students have a fresh start after each review thus allowing a Spring or Summer term payment to be possible even if they did not qualify for Autumn. This attendance review will take place centrally and students will be informed if they have unauthorised absences and invited by letter to discuss this with a member of the support staff within one week before the payment is suspended. Students must also meet the criteria as set down in the Sixth Form Contract in relation to behaviour.

### **In Year Applications and the Contingency Fund Planning – Window 2**

It is recommended that Belper School & Sixth Form Centre, hold back a percentage of funding (10%) to cater for learners suffering financial hardship during the academic year. This can also include learners who may not have been eligible at the start of the academic year but circumstances change mid-year or for learners eligible for payments joining mid year. Applications outside of “Window 1” (**Friday 18th October 2019**) will be from the Contingency Fund (10% of total Bursary Fund Centre allocation). Where possible Window 2 applications will be funded on the same basis as window 1 (pro rata). Window 2 will close **Friday 17th January 2020**.

We will notify the EFA if any of the 16-19 Bursary Fund has not been allocated after the Window 2 process and await their instructions (as per guidance document) on how to administer the remaining funds.

## **5. Timing and Amounts of Payments**

**5.1.** Students are only eligible for payments if they are legitimately enrolled and attending as defined by the criteria.

**5.2** Applications for 2019/20 Bursary Funds may be made in the time periods below:

- **Window 1:**

For a response by 8th November 2019 applications with evidence should be received by 18<sup>th</sup> October 2019

- **In Year Applications – Window 2:**

**The final deadline for applications for the 16-19 Bursary Fund for 2019-20 will be Friday 17th January. Responses on applications will be made by Friday 7<sup>th</sup> February 2020.**

\* All applications outside of Window 1 will also be pro rata based on the student enrolment date and academic year.

**5.3.** It is expected that at least 85% of the funds for the year will be allocated in October.

#### **5.4. Payment Schedule:**

<b>Attendance</b>	<b>Review Date</b>	<b>Payment Date</b>	<b>Bursary Amount</b>
Term 1:	1 week after Bursary agreed	Review Date plus 2 weeks	40%
Term 2:	End of first full week	Review Date plus 2 weeks	30%
Term 3:	End of first full week	Review Date plus 2 weeks	30%

#### **Important Notes**

1. In certain cases, payments may not be made direct to the student or may only be made on production of a valid invoice or receipt.
2. Students should ensure they have a bank account in their name through which to receive funds.
3. Cheques which are not collected or cashed within 4 weeks of the advised date by students will be cancelled and the funding reallocated.
3. If a partial allocation is made, the payments will be related proportionately.

### **6. Responsibilities**

#### **6.1 Student**

- Students making applications undertake to provide accurate information and appropriate documentary evidence where needed.
- Students in receipt of an award should comply with School/College rules and regulations as detailed in the Sixth Form Learning agreement and outlined in more detail on the web site.
- Students must inform the Bursary Fund Manager of changes in their financial circumstances.

#### **6.2 Sixth Form Pastoral Team**

- Provide details of the 16-19 Bursary Fund to students and inform them where application packs are available from.

#### **6.3 Bursary Administration Assistant**

- Distribute application packs to students – online copy of application form also made available for download
- Ensure the form is completed appropriately and that documentary evidence is provided or confirmed where required.
- Produce a collated report for use at Bursary Fund Panel Meetings
- Ensure that reasons for panel's (see 6.6) decision are accurately recorded and details passed onto the Finance Officer.
- Inform students on the outcomes of their application.

#### **6.4 School 16-19 Bursary Fund Manager / Head of Sixth Form**

- Make decisions on applications with a member of Senior Leadership Team
- Act as the first point of contact to receive any appeal
- Provide details to confirm students has / has not met the "Commitment Conditions"
- Liaise with finance officer to ensure timely payment of Bursary funds

- Liaise with Finance Officer to ensure that audit requirements are met
- Ensure that fund is publicised in an appropriate manner
- Review the policy each year and present it to governors for approval, together with a report on the take-up against the criteria used and a financial analysis of the expenditure.

### **6.5 16-19 Bursary Fund Panel**

- This will consist of the Bursary Fund Manager and one Senior Leader
- The panel will consider each application and ensure that awards are granted fairly and equitably in accordance with the fund guidelines
- The panel will meet to assess whether students have met the attendance criteria for each payment, in accordance with the fund guidelines

## **6. The Appeals Panel**

The Appeals Panel will consist of a Senior Leader involved in the original decision plus one other member of the Leadership Team (LT) and the Assistant Head of Sixth Form.

The Appeals Panel will consider any appeals not resolved by the Bursary Fund Manager.

### **6.8 Finance Officer**

- Ensure funds are paid to students in accordance with the decisions of the panel.
- Notify the student at the termly review dates re whether attendance conditions are being met before making/with holding a payment.
- Administer the cash-flow in accordance with audit and EFA requirements.
- Liaise with Bursary Fund Manager to ensure that audit requirements are met.
- Produce summary financial report for the Bursary Fund Manager.

### **6.9 Governing Body (SMEC)**

Receive report from the Bursary Fund Manager – detailing the take-up against the criteria used and a financial analysis of the expenditure. Review policy annually.

## **7. Procedures**

To make an application a student must obtain an application form from the school website or the Sixth Form Office and submit the form with any necessary supporting evidence to the Sixth Form Office.

The Bursary Fund Manager organises a meeting of the Bursary Fund Panel for Applications for Windows 1 & 2. The panel will consider each claim and make a decision in accordance with the fund guidelines and whether the student has met the Commitment Conditions. A brief explanation of the decision will be recorded on the form. Applicants will be notified of the decisions in writing. The claim forms will be sent to the Finance Officer who will send the appropriate first payment to each student.

Where a Vulnerable student has claimed for the Vulnerable Bursary the Bursary administrative assistant will complete the on-line form via the Student Bursary Support Service. Once confirmed the application is successful the Finance officer can release the funding upon receipt from the SBSS.

The Bursary Fund Panel will then meet once a term to confirm whether students have met the eligibility criteria for the subsequent payment for that term. Details of their decisions will be passed onto the Finance Officer and students notified of the decision accordingly. Payments will be signed for and collected from the Sixth Form Office.

The Finance officer will retain evidence of these payments on file for 6 years.

## **8. Appeals Procedure**

Students who consider that their claim has been inappropriately assessed can appeal by writing to the Bursary Fund Manager giving reasons, normally within 4 weeks of panel decision. If required, the Bursary Fund Manager will arrange a meeting of the Appeal Panel. The claim will be reassessed and the student informed of the decision in writing within 10 days of the Panel meeting.

## **9. Review of policy**

The policy will be reviewed annually, in accordance with recommendations from the School's audit services and EFA requirements by the Bursary Fund Manager.