



# GEORGE ABBOT SCHOOL

<b>Policy Title:</b>	<b>16-19 Bursary Policy</b>	
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<b>Date of most recent review:</b>		<b>May 2022</b>
<b>Date of next review:</b>		<b>May 2023</b>
<b>School Mission Statement:</b>	Academic excellence within a strong community of equality and respect, where potential and opportunity are realised.	

## 16-19 Bursary Fund

The 16-19 Bursary Fund is provided by the Central Government to facilitate financial support for young persons to overcome specific barriers to participation so they can remain in education.

This policy sets out the arrangements for how George Abbot School will prioritise the 16-19 Bursary Fund for the academic year 2022/23.

George Abbot School is committed to ensuring the fund is used to support financially disadvantaged young people taking up or continuing in their education or training Post 16.

The named contacts at the school for all 16-19 Bursary support/enquiries are Nina Thorns, Director of Sixth Form and Lisa Wilde, Head of Finance.

## Bursaries Available

There are two types of 16-19 Bursary available:

- *Vulnerable Bursary* – which is available to all young people who meet the general eligibility criteria as set out in this policy and who have been identified as being most in need.
- *Discretionary Bursary* – which is available to all young people who meet the general and additional eligibility criteria as set out in this policy.

## General Eligibility

To be eligible for the Bursary in 2022/23, all young people must:

- be aged 16 or over but under 19 at 31 August 2022.
- be aged 19 or over at 31 August 2022 and have an Education, Health and Care Plan (EHCP).
- be aged 19 or over at 31 August 2022 and continuing on a study programme they began aged 16-18 ('19+ continuers').
- meet the residency criteria in Education and Skill Funding Agency, (ESFA) 2022 to 2023 academic funding regulations for post 16 education.

## Additional Eligibility for Vulnerable Bursary

To be eligible for the Vulnerable Bursary in 2022/23, the young person must be:

- Currently in care.
- A Care leaver.

- In receipt of Income Support, or Universal Credit in place of Income Support, **in their own right**.
- In receipt of Employment and Support Allowance; Universal Credit and Disability Living or Personal Independence Payments, **in their own right**.

In some cases, a young person might be eligible for a Vulnerable Bursary because they are in one or more of the defined groups above but, their financial needs are met already and/or they have no relevant costs. For example, a young person in local authority care whose educational costs are covered in full by the local authority. In this case a student would not qualify for a financial bursary.

A '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.

### **Foster care, including privately arranged foster care**

A young person placed with a foster carer by the local authority, including where the foster carer is on the books of an independent fostering agency, is classed as looked after. They meet the criteria for the 'in care' vulnerable group where they need financial support to participate.

A child who is privately fostered (in other words, a private arrangement is made between the parent and the person who will care for the child) is not classed as a looked after child and is not eligible for the bursary for vulnerable groups.

In some instances, a young person may have been in the care of the local authority and the care transferred to another party via a permanent form of fostering such as a Special Guardianship Order. In these circumstances, the young person is defined as having left care so is now a care leaver. They must meet the definition of a 'care leaver' in full (so, the period of weeks and age range set out above). If they do, they are eligible for help from the bursary for vulnerable groups, where they need financial support to participate.

George Abbot School may decide if those students eligible for a vulnerable bursary, may also receive extra payments over the £1,200 allocated for specific items if this is deemed necessary for them to remain in education.

George Abbot School will assess each application individually and applicants should be aware that there is the possibility of no award or limited award. Each award will be dependent upon each student's specific individual need.

### **Additional Eligibility for Discretionary Bursary**

George Abbot School is awarded an amount of discretionary bursary money each year by the Education and Skills Funding Agency (ESFA), which is for young people who are not eligible for a vulnerable bursary. It is the school's responsibility to determine the fairest way of distributing this money. They should always ensure the bursary policy is designed to ensure funding reaches those young people who are most in need of financial support. George Abbot School will always comply with the requirements of the Equality Act 2010 when setting their criteria and will not discriminate against their students, either directly or indirectly, because of their protected characteristics.

George Abbot School will use household income, in some way, to help establish the amount of support they award to a student. This can be used in conjunction with other factors, such as distance to travel from the institution and the number of dependent children in the household, as well as the actual participation needs the student has.

George Abbot School will ask for the three most recent monthly award statements to support each bursary application. The take-home pay figure will be used in addition to the amount of Universal Credit after all deductions to give a total monthly income. Using 3 months statements will act as a guide to the household income for a quarter of a year and can be used as the basis of annual household income.

George Abbot School uses a weighted points system to determine the individual financial needs of each student to assist with allocating funding fairly. The points system is described below:

3 points:

- Eligible for the Vulnerable Bursary

2 points

- Family in receipt of Tax Credits/Income Support/Universal Credit

1 point : (may be awarded showing evidence of the following circumstances)

- Level of household debt impacting on child's education and wellbeing.
- Travel costs are a burden financially on the family.
- Number of dependants in the household.
- Medical conditions restricting household income.
- Household income below £29,500 per year.
- Any other circumstances that require consideration.

The points-based system is awarded at the discretion of the school and is subject to a range of factors. It will allow the school to prioritise particular students who are in most need of finance if funds do not cover the overall needs of the cohort.

George Abbot School is permitted to use discretionary funding received in the academic year, plus any underspend from the previous year, (see underspends below). The total amount is divided using the total points score for all discretionary students.

Funds allocated to discretionary bursary students is limited to demand. Therefore, prioritisation will be based on the points-based system.

#### **Typical discretionary funding allowance:**

- All bursary allocations will be made on the needs of the individual and students will not automatically awarded a flat rate payment.

There is no set limit for the amount of discretionary bursary that can be awarded to students. George Abbot School can award discretionary bursaries equal to or higher than the bursary for vulnerable groups maximum if it has been clearly identified that an individual student requires this level of funding.

#### **Evidence**

All applications to access the 16-19 Bursary Fund must be supported by appropriate evidence. Copies of evidence shall be retained by George Abbot School to provide financial assurance as required. All evidence will be treated as confidential and destroyed after 6 years of the young person leaving the Academy.

Acceptable supporting evidence for the **Vulnerable Bursary** will be either:

- Statement from the Local Authority confirming the young person's current looked after status (Academy are able to clarify this information).
- Recent Entitlement or Award Statement setting out the benefits to which the young person is entitled.

Acceptable supporting evidence for the **Discretionary Bursary** will be either:

- Recent Entitlement or Award Statement setting out the benefits to which the young person is entitled.
- Latest Tax Credit Award Notice for the young person's household. This document from HM Revenue & Customs details entitlement to Tax Credits and the Total Income for the correct (previous) Tax year.

- 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 the correct Tax Year. The income will be shown as total for year.
- Self-Assessment Tax Calculation this is the equivalent of the P60 for self-employed people. It must be for the correct adult(s) and for the correct Tax year. The income will be shown as total for year.
- Confirmation from the Local Authority of entitlement to Free Academy Meals (FSM).
- If the student lives between households then the school will liaise with all parties to identify the financial need.

### **Application**

Applications for a Bursary must be made using the correct Application Form and should be submitted to Nina Thorns (Director of Sixth Form) with the appropriate supporting evidence.

### **Method of Payment**

George Abbot School will liaise with the student to discuss how the funding can provide the best support possible, based on an individual basis. Where possible, George Abbot school will buy resources directly (in kind) e.g. bus tickets, books, equipment. When these payments are made we will explain the value of the payments to the student and how they have been deducted from their total bursary award. Where payments are made directly to a student, this will be done via a BACS transfer directly into the student bank account.

### **How the funding is used to prioritise support for disadvantaged students**

Once the value of each bursary is established, a personalised, costed learning plan will be set up to support the specific needs of each student. This will be written and managed by the Finance Officer.

This will include, for example, travel passes, educational resources, protective clothing/equipment, electronic equipment or an individual costing plan for any compulsory educational trips. George Abbot School can specify students must return books and equipment at the end of their study programme to be used again by other students where appropriate. The returning of equipment should occur on the day of their final exam/last practical lesson. All awarded bursary funding will be costed to the individual's needs.

To give an example: if we decided IT equipment (a laptop or tablet) is necessary for the student to complete their study programme, it can be bought with bursary funds. However, the equipment should be returned to the academy once the student has completed the study programme for re-use by another student. If keeping this laptop or tablet in school is the best way of ensuring this happens, we have the right to set this as a condition. Any IT equipment returned must be data cleansed before being re-issued to another student.

If any student is unable to afford food whilst on site, and is not currently eligible for FSM, then the bursary can be used as a short-term measure. Additionally, the local food bank will be contacted to offer the family additional support. The student may also be applicable for Free School Meals.

It is the policy of George Abbot School that all resources purchased using bursary funding will be retained by the academy once the student has left and re-allocated to another identified student in the following year.

### **Exclusions – what the Bursary cannot be used for**

The bursary fund is not intended to:

- Provide learning support e.g. counselling, mentoring or tutoring
- Support extra curricular activities where they are not essential to the study programme
- Support general household incomes

Schools cannot use the bursary funds in any way that would give them a competitive advantage over other institutions, for example:

- Fees for access to facilities in the academy.
- Block subsidy of meals.
- Block subsidy of transport.
- Block provision of equipment, material or books.
- To make bonus payments to reward attendance or achievement.

### **Change of Young Person's Financial Circumstances**

Any young person in receipt of a Bursary has a duty to inform the school should their financial circumstances change, or those of their parent/carer.

### **Young Person Transferring**

Where a young person in receipt of a bursary transfers out of the Academy to another education/training provider in-year, the school will liaise with that provider to ensure continuity of bursary payments.

### **Young Person Withdrawing**

Where a young person in receipt of a Bursary withdraws and does not transfer to another education/training provider, bursary payments made prior to the date of withdrawal will not be recovered but any scheduled payments to be made after the date of withdrawal will not be made.

### **Underspends**

Academies are permitted to carry any unspent funds over to the next academic year. Any unspent funds that are carried forward cannot be added to general institution funds and must continue to be used to support students in Post 16 education.

Academies must fully utilise any unspent funds for discretionary bursary before using their new academic year allocation.

### **Removing bursary funding**

George Abbot School will make payments for the bursary fund - both for the bursary for vulnerable groups and the discretionary bursary - conditional on the student meeting agreed standards of attendance and behaviour.

George Abbot School must ensure any standards they set are clear, accessible and understood by students.

George Abbot School will obtain and retain evidence a student has seen and agreed to the conditions. This might be an agreement signed by the student or a signed declaration that forms part of the institution's bursary fund application form.

George Abbot School can withhold payments if a student does not meet agreed standards, such as 95% attendance, but they should always consider the individual circumstances of the student first. Sanctioning a student to the extent their bursary funding had been stopped for a whole term, for example, is not recommended as it can stop students attending and undermine the purpose of the bursary fund.

George Abbot School will always consider the impact on attendance that might be caused by illness, caring responsibilities or other exceptional circumstances. This should be built into the payment conditions agreed between the student and their institution, so both parties are aware of the potential effect on payments.

George Abbot School will stop payments where students have been absent for a period of 4 continuous weeks or more (excluding holidays, or if there is evidence that the student intends to return) and where students have made a decision

to withdraw from a study programme. George Abbot can also take money back from students if they have not spent it for the reasons it was awarded to them. However, we will consider the impact of such an action on the individual student before taking a final decision to do so.

### **Recycling Vulnerable Bursary funds**

Academies may accrue some unused vulnerable bursary funds during the academic year, for example:

- if a student leaves early after only receiving part of their vulnerable bursary.
- if the full amount is not paid to a student because they did not meet the agreed conditions, academies are expected to recycle this funding and use it to offset funding claims to the SBSS for other vulnerable students until 30 April 2023. For example, rather than claiming £1,200 for a newly identified vulnerable student, the institution may already be holding £600 which they claimed for a student who has now left and is not now being used for that student. The institution should recycle the £600 for a new vulnerable group student, claiming only £600 from the SBSS to give them the total amount of funding they need.

Where an institution holds enough funds to cover the costs of a new vulnerable bursary in full, they should still submit a funding claim form to the Student Bursary Support Service (SBSS) (showing a zero amount) to ensure the ESFA has accurate information about the numbers of vulnerable students.

Institutions can add any vulnerable bursary funding they have claimed, but no longer need, for vulnerable students to their discretionary bursary allocation in the later part of the academic year - from 1 May 2023.

Institutions that have incorrectly claimed vulnerable bursary funds for a student (because they did not meet the criteria, for example), should try to recycle this funding against other vulnerable students on subsequent funding claims. However, if the institution has no other vulnerable students, the incorrectly claimed funds must not be added to their discretionary bursary allocation (because they were claimed in error). Instead, institutions should contact ESFA to arrange to return the funds: [enquiries.efa@education.gov.uk](mailto:enquiries.efa@education.gov.uk)

### **Fraud**

The Department for Education takes all concerns relating to financial irregularity or impropriety seriously and will instigate an investigation where it considers concerns have been raised in good faith and there is sufficient evidence to warrant it.

Academies are responsible for investigating instances of fraud relating to bursary fund applications.

### **Audit**

16 to 19 bursary funds are subject to assurance as part of normal assurance arrangements.

### **Management Information**

The ESFA has stopped the annual voluntary management information collection for the 16 to 19 bursary fund. Academies should now complete the Individualised Learner Record (ILR) or Academy census as appropriate.

### **Administration Fees**

Academies are permitted to use up to 5% of their allocation for administrative costs.