



16-19 BURSARY FUND POLICY (ACADEMIES)

2023-24

The OHC&AT Board of Trustees has agreed this Policy and as such, it applies across all OHCAT Academies – 13th July 2023.

Jay Mercer

Chair of OHCAT Board

A handwritten signature in black ink, appearing to read 'Jay Mercer', is written over a thin horizontal line.

16-19 Bursary Fund Policy (Academies)

INTRODUCTION

Orchard Hill College and Academy Trust (OHC&AT) is committed to providing outstanding educational opportunities for all our pupils and students. As a family of providers working for mutual benefit, we believe that together we can offer the very best for our pupils and students and for their local communities.

This policy sets out arrangements for how Orchard Hill College Academy Trust (OHCAT) will operate the 16-19 Bursary Fund across its academies for the academic year 2023-24. This policy is based on the Education and Skills Funding Agency's (ESFA) [guidance for the 16 to 19 bursary fund 2023 to 2024 academic year](#).

WHAT IS THE 16-19 BURSARY FUND?

The 16-19 Bursary Fund is a scheme set up by the Department for Education (DfE) and funded by the ESFA. The Fund provides financial support to eligible students to help overcome their specific financial barriers to participation so they can remain in education and training.

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

WHO IS ELIGIBLE TO APPLY?

There are two types of bursary: a discretionary bursary and a vulnerable bursary.

To be eligible for the **discretionary bursary**, a student must:

- Be enrolled at an OHCAT academy starting in September 2023.
- Have 'home' student status or have been granted full 'refugee' or 'asylum seeker' status.
- Have been 'ordinary resident' in the UK, EU or EEA continuously for the last three years with 'settled status' which means having indefinite leave to remain.
- Have a household income of less than £40,000 per year.
- Be aged 16 or over but under 19 at 31 August in the enrolling academic year **or**
- Be aged 19 or over with an Education Health and Care Plan (EHCP) **or**
- Be aged 19 or over and continuing on a study programme which began when aged 16-18.

To be eligible for the **vulnerable bursary**, students must meet the age, enrolment and residency criteria above and fall into one of the following categories:

- Young people who are looked after (in care)
- Young people leaving care
- Young people in receipt of Income Support or Universal Credit in place of Income Support, in their own name
- Young people in receipt of 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.

Students aged 19 or over are not eligible for the vulnerable bursary.

Students on apprenticeship programmes or other waged training are not eligible for bursary funding.

Residency

Students must meet the residency criteria in the ESFA funding regulations for post-16 provision.

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.

The Academy will provide in-kind support (e.g. books, equipment, 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, the Academy 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.

HOW IS THE 16-19 BURSARY FUND ALLOCATED?

Discretionary Bursary

Discretionary Bursaries are awards made to students by the Academy to help young people overcome the individual financial barriers to participating in education, for example help with:

- travel
- educational visits
- books and equipment
- clothing
- specialist equipment
- other circumstances that prevent participation

Funding for the Discretionary Bursary is received directly by the Academy from the ESFA. The allocation process for these funds is as follows:

- Students that apply will be assessed individually against the criteria and will be awarded a bursary fund based on their actual financial need
- Any unspent discretionary funding from the previous academic year will be prioritised for students based on their actual financial need in the current academic year
- Some funding will be held back for a contingency for students whose personal circumstances may change
- 5% of the discretionary fund will be held back to cover administrative costs

Vulnerable Bursary

The Vulnerable Bursary Fund is designed to help support young people who face the greatest financial barriers to participate in education or training.

The Academy has to apply for the Vulnerable Bursary via a Funding Claim form to the Student Bursary Support Service ([SBSS](#)) once eligible young people are identified. The Student Bursary Support Service, part of the ESFA, will then issue funds directly to the Academy.

Applications must be supported by appropriate evidence. Examples of acceptable evidence we may request include:

- 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.

Eligible students can apply for a vulnerable bursary of **up to** £1,200.

HOW TO APPLY

The Application Form for the 16-19 Bursary Fund Policy is at Appendix A. Applicants should complete this form and bring it to the Academy they attend.

Evidence of eligibility is required and should be included with the completed application form.

Funding is not guaranteed by the acceptance of an application form. The Academy will notify students/families in writing of the outcome of their application.

Conditions for receipt of student bursaries

Receipt of both vulnerable student bursaries and discretionary bursaries is conditional on the student meeting attendance standards as defined by the Academy.

Assessment and approval of applications

Each application with supporting documentation will be assessed in strictest confidence using the checklist at Appendix B and approval form at Appendix C.

Discretionary fund payments will be subject to review and approval by a representative of the Academy Senior Leadership Team.

High value equipment

We may be able to help with the cost of high value equipment such as laptops, cameras and tablets where students require them to successfully complete their course. This will be dependent on the budget available. The equipment will remain the property of OHC&AT and should be returned once the course has been completed so it can be used by another student. To ensure this happens, all equipment will be kept at the Academy unless specifically agreed otherwise. See Appendix D: School Equipment for Student Use.

In special circumstances and at the discretion of the Academy Senior Leadership Team, some students may be allowed to retain their equipment at the end of the course, where a particular need has been identified.

PAYMENT

Please note that the Academy can choose to pay bursary awards 'in kind' e.g. by purchasing equipment required or may make payments directly into the student's bank account by BACs. The level of support which the Academy can offer under the Discretionary Bursary is dependent on the funding received from the ESFA and the number of applications received.

Please note: Students will need to have a current bank account. If the payment is to be made payable to someone other than the student, proof of Power of Attorney must be provided.

RECORDING AND REPORTING

Secure records will be kept by School Business Managers of all bursary awards, receipts and payments for a period of six years.

An annual report on the number of bursary awards made and the total value will be produced by each Academy and submitted to the Trust Finance team for review.

APPEALS

If a young person or their parent/carer are not satisfied with the outcome of their application, they should appeal in writing to the Principal of the Academy within 10 working days, stating the reasons why. The Principal will review the application within 15 working days of receiving the appeal.

The decision of the Principal is final and will be given in writing within 10 working days of their decision.

POLICY REVIEW DETAILS

<i>Version:</i>	2.3
<i>Reviewer:</i>	Corrina Jenkins
<i>Approval body:</i>	Family Board
<i>Date this version approved:</i>	13 th July 2023
<i>Due for review:</i>	Summer 2024

APPENDIX A: 16-19 BURSARY FUND APPLICATION FORM 20223-24

Please complete this form and bring it, together with your supporting evidence, to the Academy you attend in order for your application to be processed.

Student details					
Title:		First name:		Surname:	
DOB:		Age: <i>(on 31st August 2023)</i>			
Address:					
Postcode:		Tel:		Email:	
Have you the right of abode and been resident in the UK for the last three years?				Yes	No
Do you have an Education Health and Care Plan?				Yes	No

Bursary criteria
To qualify you must: <ul style="list-style-type: none"> • meet the ESFA's residency criteria • be aged 16 or over and under 19 on 31 August 2022 or • aged 19 or over with an Education Health and Care Plan (EHCP) or • aged 19 or over and continuing on a study programme which began when aged 16-18

Vulnerable Bursary criteria		
To qualify you must fall into one of the below categories and produce the required evidence as stated.		
Are you in receipt of Income Support or Universal Credit? <i>(evidence required - Income Support or Universal Credit Statement Letter)</i>	Yes	No
Care Leaver or currently looked after in care? <i>(evidence required - letter from Local Authority)</i>	Yes	No
Disabled student in receipt of both Employment Support Allowance or Universal Credit and Disability Living Allowance/Personal Independence Payments <i>(evidence required, award letter showing in receipt of both ESA (UC) + DLA/PIP)</i>	Yes	No

Discretionary Bursary criteria					
Your household income is one of the criteria, which will help us to assess your application. If your TOTAL Household income exceeds £40,000 per annum , you will not be eligible for a Bursary payment.					
Please tick to indicate what type of evidence you have provided. If you cannot provide evidence then we cannot process your application for bursary payments.					
P60		Income Support/ Universal Credit (award letter)		Full Tax Credit Award Notice	
Self-employed earnings (tax return)		Other benefits/ pension (award letter)		Wage slips for household	

The amount of financial assistance you will receive is dependent on your personal circumstances. It is intended to help you with the costs of overcoming any financial barriers you may have when attending learning. Using the table below, please tell us what you will need financial assistance. This information is strictly confidential and will only be used for this assessment purpose.

What do you need financial assistance for?	How much will you need?
Travel	
Educational visits	
Books or equipment	
Clothing	
Specialist equipment	
Any other assistance or exceptional circumstance	

Payment details

Please note that the academy can choose to pay Bursary awards 'in kind' e.g. by purchasing equipment required or may make payments directly into the student's bank account by BACs. Please provide your bank details below as printed on your bankcard or statement.

Name of account holder	
Sort code	
Account number	
Name of bank or building society	

Declaration

I certify that the information I have given on this application form is true and accurate.

I understand that the information given on this form may be shared with other departments within the Academy including the Academy Trust finance team.

I understand that if I withdraw from the Academy I may be liable to pay back all or some of the monies awarded to me or the Academy on my behalf.

Print Name _____ Date _____

Signature _____ Relationship to student _____
(if applicable)

Power of Attorney

If you wish the payment to be made to someone other than the student you must provide proof that they are responsible for the student's finances such as Power of Attorney. This can include a letter from the Department of Work & Pensions.

Payment to be made to _____

APPENDIX B: ASSESSMENT CHECKLIST 2023-24

FOR SCHOOL USE ONLY

Eligibility: all bursaries

	Student meets the age criteria
	Eligible education provision
	Student meets the residency criteria for post-16 provision
	Evidence of eligibility has been retained

Bursary for defined vulnerable groups

	Student falls within one of the defined vulnerable groups for example, in receipt of the specified benefits in their own right or in care/care leaver.
	Financial needs assessment carried out to confirm actual financial need and amount of support required. No student should automatically receive £1,200.
	Appropriate evidence seen and copies retained to confirm student's eligibility.
	Support awarded in kind (for example, books or equipment purchased on student's behalf) or BACs payment made. Receipts should be retained.
	Award letter issued to student confirming the amount of financial support, what support will be made in-kind and payment conditions.

Discretionary bursary

	Evidence to confirm the student meets the bursary fund criteria, including household income and statement of actual participation costs.
	Evidence of income and overall eligibility obtained, and copies retained.
	Assessment of student's actual financial needs carried out. Block, blanket or flat rate payments are not permitted – the bursary award should reflect the actual costs the student has.
	Support awarded in kind (for example, books or equipment purchased on student's behalf). Receipts should be retained.
	Award letter issued to student confirming the amount of financial support, what support will be made in-kind and payment conditions.

APPENDIX C: APPROVAL FORM 2023-24
FOR SCHOOL USE ONLY
Eligibility – please tick appropriate box (✓)

Vulnerable Bursary		Young people who receive income support/universal credit. Care leavers or young people who are looked after children. Disabled young people in receipt of both Employment Support Allowance and Disability Living Allowance/PIP.
Discretionary Bursary		Young people facing financial barriers to participation in education.

16-19 Discretionary Bursary Fund Assistance Requested	Assistance Granted ✓
Travel	
Educational visits	
Clothing	
Books or equipment	
Any other assistance or exceptional circumstance	

SIGNED:
DATE:
NAME:
POSITION:

To be signed by a member of the Academy Senior Leadership Team

APPENDIX D: SCHOOL EQUIPMENT FOR STUDENT USE

FOR SCHOOL USE ONLY

Student Name:

Equipment Provided:

Make:

Serial number:

Asset Tag Number:

Conditions of school equipment being provided for student use

All equipment supplied to the pupil/student remains the property of the school.
Equipment must be returned to the school on request.

The equipment supplied is for the purpose of supporting the named student with their school work only. The equipment must not be passed onto a third party.

If there is any damage to the equipment the school must be notified immediately.

By signing this form

- I agree I have received the equipment listed above
- I agree to the above conditions of the school equipment being provided
- I agree to abide by the school's acceptable use of IT policy

Signed:

Print name:

Date equipment issued:

Signed by school representative:

Date equipment returned to school: