



Herschel Grammar School 16-19 Bursary Fund 2023-24 Policy

1. Background

The 16-19 Bursary Fund scheme provides financial assistance to those young people who face a financial barrier to continuing in education or training post-16.

The 16-19 Bursary Fund has been allocated by the Education Funding Agency (EFA), the body responsible for funding 16-19 education and training.

This policy sets out the arrangements for how the Herschel Grammar School (the School) will prioritise and administer the 16-19 Bursary Fund in 2023-24.

The 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 and achieving their learning aims.

The named contact at the School for all 16-19 Bursary support/enquiries is the Bursary Fund Co-ordinator.

2. Bursaries available

There are two types of Bursary available:

i. Vulnerable Bursary

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

ii. Discretionary Bursary

A Discretionary Bursary is available to all young people who meet the general *and* additional eligibility criteria as set out in this policy.

3. Bursary funding

The 16-19 Bursary Fund is a limited fund determined by the EFA. The School will retain at least 10% of the 16-19 Bursary Fund to use as a hardship contingency fund to respond to exceptional or circumstantial in-year changes.

4. General eligibility

To be eligible to receive a Bursary, all young people must be aged 16, 17 or 18 at 31st August 2023 and meet the residency criteria in the EFA Funding Guidance.

5. Additional eligibility for Vulnerable Bursary

Young people in the defined vulnerable groups are usually living apart from their parents/carers, so can get social security benefits in their own right. The defined vulnerable groups are young people who are:

- in or recently left local authority care;
- getting Income Support or Universal Credit in their own name;
- getting Employment and Support Allowance (ESA) **and** either Disability Living Allowance (DLA) or Personal Independence Payment (PIP) in their own name;
- getting Universal Credit in their own name in place of Income Support or ESA.

6. Additional eligibility for Discretionary Bursary

A Discretionary Bursary is available to all young people where:

- their **gross** annual household income, as assessed by HM Revenue & Customs in the last Tax Year, does not exceed **£20,000** and/or;
- where the young person, or a sibling, qualifies for Free School Meals (FSM).

7. Those not eligible

Applications to the 16-19 Bursary Fund are not open to young people aged under 16 or over 19 at 31st August 2023.

8. Evidence

All applications to access the 16-19 Bursary Fund must be supported by appropriate evidence. Copies of evidence shall be retained by the School to provide financial assurance as required. All evidence will be treated as confidential and destroyed within 1 year of the young person leaving the School.

Examples of acceptable supporting evidence for the **Vulnerable Bursary** are:

- Statement from the Local Authority confirming the young person's current or previous looked after status.
- Recent entitlement or award statement setting out the benefit to which the young person is entitled, and confirming that the recipient can be in further education or training.

Examples of acceptable supporting evidence for the **Discretionary Bursary** are:

- **A full Tax Credit Award Notice (TCAN)** for the young person's household. This document from HM Revenue & Customs details entitlement to Tax Credits and shows the total income for the year.
- 3 most recent monthly **Universal Credit** award letters that show evidence of income.
- **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 for the correct Tax Year (to April 2023). The income will be shown as Total for the Year.
- **Payslips** from the previous 3 months.
- **Self-Assessment Tax Calculation (SA302)**. 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 (to April 2023). The income will be shown as Total for the Year.
- Evidence of other benefits, pension awards, etc.
- Confirmation from the Local Authority of entitlement to **Free School Meals (FSM)**.

9. Payments

The majority of the funding will be used to purchase school and educational related resources on your behalf. However, there may be rare occasions when we need to make payments directly to you. These payments will be via BACS to a bank account in the name of the young person. The young person must have a valid account in their name unless there are exceptional reasons which mean an appointee has been named to manage the affairs of the young person.

10. Qualifying condition requirements

Eligible young people will need to complete a qualifying learning period of 6 weeks before they are able to receive Bursary payments. However, any eligible young person can make

an application ahead of the six week qualifying period and in a case of extreme hardship, consideration will also be given for payment in advance of the six-week period.

All young people in receipt of a Bursary must meet weekly punctuality and attendance requirements of 90% to ensure continued support. In addition, all young people in receipt of a Bursary must behave appropriately and submit work of an appropriate level and to required deadlines. If the young person does not meet these conditions, the School reserves the right to withdraw or suspend Bursary payments.

These conditions will not be additional to those expected of any young person within the School.

11. Application

Applications for a Bursary must be made using the correct Application Form and should be submitted in full by **Friday 20th October 2023**. Applications made after this date will be considered provided sufficient funds are available. However, once the Bursary Fund has been used, it will not be possible to consider further applications.

Consideration must be given to assisting any young person to make an application where they are unable to do so due to a level of learning difficulty and/or disability. Please see Miss Ali if you require assistance.

Consideration must also be given to assisting any young person in making an application where they are not able to provide supporting evidence due to difficulties with engagement or support from their parent/guardian/carer(s).

12. Process

All applications for a Bursary or to access the contingency fund will be assessed by a 16-19 Bursary Application Panel, consisting of:

- Headteacher
- School Business Manager

The Panel will review the application, supporting evidence and any other personal circumstantial evidence and young people will be notified of the outcome within four school weeks of the deadline of applications.

13. Appeals

If any young person or their parent/guardian/carer(s) are not satisfied with the outcome of their application, they should write to the Headteacher outlining their reasons why. The Headteacher will convene a 16-19 Bursary Appeals Panel, consisting of:

- Headteacher
- A member of the Governing Body

The Panel will consider and respond to appeals within **three school weeks** of receipt. If the appeal is upheld or partly upheld it will be referred back to the 16-19 Bursary Application Panel with recommendations. If the appeal is not upheld the appealing party will be signposted to the School's Complaints Procedure.

14. Confidentiality

Applications and supporting evidence will be confidential to the 16-19 Bursary Application Panel and in the event of an appeal, the 16-19 Bursary Appeals Panel. The applications and supporting evidence will remain confidential during processing, payment and storage. If it is necessary to obtain additional information to reach a decision, the young person and/or their parent/guardian/carer(s) will be told the reasons why this is necessary prior to sharing any information further.

15. Change of young person's financial circumstances

Any young person in receipt of a Bursary has a duty to inform the School should if their financial circumstances, or those of their parent/guardian/carer(s) change (e.g. increase in

household income, Free School Meals being withdrawn for a sibling). This does not automatically mean any future Bursary payments will be stopped but would result in a convening of the 16-19 Bursary Application Panel to determine whether the payments continue or be stopped and the funds redistributed.

16. Young person transferring

Where a young person in receipt of a Bursary transfers *out of* the School to another education/training provider in-year, the School will liaise with that provider to ensure continuity of Bursary payments to enable the young person to complete the learning aims.

Where a young person in receipt of a Bursary transfers *in to* the School from another education/training provider in-year, the School will liaise with that provider to ensure continuity of Bursary payments to enable the young person to complete the learning aims.

17. Young person withdrawing

Where a young person in receipt of a Bursary withdraws from the School, 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.

18. Supporting documents

In addition to this policy being openly shared with all young people and their parent/guardian/carer(s) please see the Application Form.

19. Further information

Further national information on the 16-19 Bursary Fund can be found on the Education Funding Agency website.