

## DOVE HOUSE SCHOOL ACADEMY TRUST

### 16- 19 Bursary Policy

<b>Policy Title</b>		16-19 Bursary Policy	
<b>Author / Reviewer</b>		Governance Lead/Finance and Resources Director	
<b>Trustee Committee</b>		Delegated to the Interim Headteacher	
<b>Signed by Chris Toner (Interim Headteacher)</b>			
<b>Reviewed</b>	June 2021	<b>Approved</b>	July 2021
		<b>Next Review</b>	May 2022

#### Aims and Principles

This policy sets out the arrangements for Dove House School Academy Trust to operate the 16-19 Bursary Fund for the academic year 2021-22. This policy is based on the Education and Skills Funding Agency’s (ESFA) 16 to 19 Bursary Fund Guide 2021 to 2022.

At Dove House School Academy Trust, we provide 16-19 bursaries for students to ensure they have access to their studies, where they would otherwise be unable to do so for financial reasons. We are committed to closing the attainment gap between students from poorer and more affluent backgrounds, ensuring that every student participates in, and benefits from, a place in 16-19 education and training.

There are two types of bursaries available and each bursary must meet the eligibility criteria. The government sets out specific criteria for the **vulnerable bursary** which entitles students to funding, whilst the eligibility criteria for the **discretionary bursary** is determined by our school. In **both** cases, the school is responsible for determining whether a student’s application has been successful.

We are dedicated to:

- ❖ Distributing 16-19 bursaries via a fair and equal process that is transparent, accountable and easily understood.
- ❖ Ensuring that information regarding the application, award and administration of 16-19 bursaries is available to all.
- ❖ Widening access to, and participation in, sixth form education.

- ❖ Ensuring all students who are eligible for funding have access to it.

### **Eligibility**

- ❖ A student must be 16 or over, but under 19 years old on 31 August before the academic year in question to be eligible for bursaries for that academic year.
  - ❖ Where a student turns 19 during their programme of study, they will continue to receive the bursary up until the end of the academic year in which they turn 19, or until the end of the programme of study, whichever is sooner.
  - ❖ 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 or have an EHCP.
  - ❖ Students aged 19 or over are not eligible for bursaries for vulnerable groups.
  - ❖ If any student is on an apprenticeships programme, or any waged training, they are employed rather than in education and are therefore not eligible for a bursary.
  - ❖ Where a student's circumstances change, they can apply more than once. In this case, the student will be reassessed, including a one-to-one interview, to determine if there are any exceptional circumstances to consider.
  - ❖ All students will be assessed individually for either bursary. Evidence must be provided to support applications – a full list of supporting evidence is outlined in our 16-19 Bursary Application Form (Appendix 2).
- ❖ Students must meet the residency criteria for post-16 provision

### **Vulnerable bursaries**

Students who meet the criteria and who have a financial need can apply for a bursary for vulnerable groups. The defined groups reflect that these students are unlikely to be receiving financial assistance from parents or carers so may need a greater level of support to enable them to continue to participate.

Dove House School Academy Trust's eligibility criteria for receiving a vulnerable bursary includes students who are:

- ❖ In care.
- ❖ Care leavers.
- ❖ Receiving Income Support or Universal Credit because they are financially supporting themselves and/or someone who is dependent on them and living with them, such as a child or a partner.
- ❖ Receiving Disability Living Allowance or Personal Independence Payments in their own right, as well as Employment and Support Allowance (ESA) or Universal Credit in their own right.

- ❖ Students who claim ESA or Universal Credit in their own right, are able to do so whilst living in the parental home – there is no requirement to be living independently. Dove House School Academy Trust will remind parents (via the application form) that they will not be able to continue to claim Child Benefit if the student successfully applies for ESA.

At Dove House School Academy Trust, students will be participating on a course lasting 30 weeks or more and on a full-time basis and can therefore apply for a vulnerable bursary of up to £1,200, if they need that amount of support.

Proof will be needed to evidence that a student is eligible for the bursary, in line with the guidance provided in Appendix 1 and our application form (Appendix 2).

Dove House School Academy Trust is responsible for assessing whether students are eligible to receive a vulnerable bursary and will only submit a funding claim to the Student Bursary Support Service (SBSS) once sufficient evidence has been provided of the amount they actually need to participate.

Dove House School Academy Trust may decide that although a young person may be eligible for a bursary because they are in one or more of the defined vulnerable groups, the bursary is not required as they do not have any actual financial need.. If financial needs are already met and there are no other relevant costs, Dove House School Academy Trust may decide not to allocate a bursary to the student.

Where Dove House School Academy Trust refuses a student's application to receive a vulnerable bursary, the reasons for this will be explained in writing. If a student, or the student's parents or support worker, still wants to claim a bursary for vulnerable groups, Dove House School Academy Trust will assess whether:

- No bursary should be awarded, as the student has no financial needs; or
- A reduced bursary should be awarded, as the level of financial help needed is limited.

### **Discretionary bursaries**

Dove House School Academy Trust will ensure that discretionary funding is allocated to the students who are **most in need** of financial support in each year they require support.

The institution's eligibility criteria for being considered for a discretionary bursary includes:

- ❖ Students who receive or have previously received free school meals.
- ❖ Students living in a low-income household, defined for our purposes as less than £16,190.
- ❖ Students who have additional responsibilities, such as being a young carer or parent.
- ❖ Students who are from a single parent family or have two or more dependent siblings in their family
- ❖ Students who are completing a placement where specialist equipment and clothes are required

- ❖ Exceptional cases, dealt with at the discretion of the Headteacher, to respond to a typical need not identified through a formula approach.

Typical items the bursary could fund are:

- ❖ Transport costs, that are not met by the statutory transport duty of the Local Authority
- ❖ Books and equipment
- ❖ Uniform or specialist clothing
- ❖ Educational trips
- ❖ Meals

Dove House School Academy Trust will assess individual applications based on each individual's circumstances and their actual financial need. This assessment will be documented and evidence to support the claims will be obtained and retained for auditing purposes in accordance with the Checklist in Appendix 1.

The assessment will be based on a student's financial needs and Dove House School Academy Trust will consider any unearned income, such as shares/investments, savings and rental income.

Dove House School Academy Trust will use in-kind payments over cash payments wherever possible.

Dove House School Academy Trust will follow good practice to make payments on a regular basis (e.g. weekly or monthly) to help the student manage their finances. The schedule of payment will be advised upon approval of the application.

This also allows that if a student has a payment withheld due to failing to meet the conditions, then they will not be left without financial support for a long period.

In the exceptional circumstance where a student cannot administer their own account and manage their own funds, then the bursary will be managed by the student's parent/carer.

Dove House School Academy Trust can insist that students only spend the bursary payments that have been made to them on the support that has been identified as part of the application process e.g. if the bursary has been awarded for equipment costs, it is expected that it is only that which the money is spent on.

Dove House School Academy Trust will manage the discretionary bursary to keep payments within budget. **This may mean that some applications are unsuccessful.**

Where Dove House School Academy Trust decides that a student is ineligible for **discretionary** funding, the reasons for this will be explained in writing.

### **Conditions for Receiving Bursary Funding**

Receipt of a vulnerable or discretionary bursary will be conditional on the student meeting the agreed standards set by Dove House School Academy Trust.

The conditions of payment will be clear and accessible to students and parents as part of the application form, as well as being thoroughly explained as part of the induction process.

Evidence that the student has seen and agreed to the conditions will be kept for audit, such as an agreement signed by the student.

The agreed standards are:

- ❖ Students in receipt of bursaries must have 85 percent attendance, unless the absence is authorised
- ❖ Students that are absent due to sickness will be expected to present a note from a qualified medical practitioner if their absence is longer than 5 days
- ❖ Vacation breaks outside timetabled school holiday times are not permitted
- ❖ Students in receipt of bursaries will be expected to abide by the Behaviour Policy of Dove House School Academy Trust

Where there are concerns regarding a student's attendance or behaviour, the school will discuss the issue with the student and consider individual exceptional circumstances before withholding any payments.

Dove House School Academy Trust will stop payments where a student has been absent for a period of four continuous weeks or more, excluding holidays or if there is evidence that the student intends to return.

Dove House School Academy Trust will also stop payments where a student withdraws themselves from a study programme.

Money may be taken back from students if it has not been spent for the reasons it was awarded to them. Before doing so, Dove House School Academy Trust will always consider the impact of this on the student.

Dove House School Academy Trust may specify that students return any books and equipment, such as a laptop, at the end of their study programme for use by other students. This will be clearly communicated to students and their parents upon confirming eligibility of the bursary.

### **Recycling bursaries**

Dove House School Academy Trust can recycle unused funding for bursaries for vulnerable groups until 30 April 2022, e.g. if a student leaves early after only receiving part of their bursary.

Where Dove House School Academy Trust has accrued funds, it will use them for another student, rather than claiming for the full £1,200, e.g. if a student left and £700 was unspent, Dove House School Academy Trust will only claim £500 towards another eligible student.

If Dove House School Academy Trust has enough funds to cover the costs of a full bursary (£1,200), it will submit a funding claim showing a value of zero to the SBSS and use the amount to fund the new student.

Dove House School Academy Trust can add any funding for bursaries for vulnerable groups it has claimed, but no longer needs, for eligible students for discretionary bursaries (from 1 May 2022). Funds will be allocated in this way on a case-by-case basis after assessing students' needs.

Dove House School Academy Trust can also carry forward any unspent funds to the next academic year – any carried funds **must** only be used to support students.

If Dove House School Academy Trust has no other students who are eligible for a bursary for vulnerable groups, they will contact the ESFA and arrange to return the funds.

### **Student Declarations**

Students and their parent/carer will sign a declaration when they apply for either a vulnerable or discretionary bursary, confirming that any evidence given in support of the application is correct.

By signing the declaration, the student and their parent/carer are agreeing to all the conditions and eligibility criteria.

Dove House School Academy Trust will retain copies of the declaration and supporting documentation for six years, in line with DfE requirements.

### **Managing applications**

Applications for the 16-19 bursary should be submitted by the 30<sup>th</sup> of September each academic year, using the application form in Appendix 2, to allow Dove House School Academy Trust to assess overall demands and distribute discretionary awards fairly.

Dove House School Academy Trust understands, however, that some needs may arise throughout the academic year. As such, Dove House School Academy Trust does not implement a final cut-off date for applications and reserves the right to retain some funds for discretionary award applications later in the year.

### **Fraud**

Dove House School Academy Trust has the right to investigate any suspected instances of fraud relating to bursary fund applications.

If evidence comes to light that supplied information is misleading or fraudulent, Dove House School Academy Trust will stop any further payments and will attempt to recover any payments already provided to the student.

Where significant fraud is identified, Dove House School Academy Trust will report this to the ESFA – this includes the following:

- The amount of money is in excess of £1,200
- The particulars of the fraud are novel, unusual, systematic or complex
- There is likely to be great public interest due to the nature of the fraud or the people involved

The matter may also be referred to the police, with the possibility of the student and/or their parent/carer facing prosecution.

### **Exclusions**

The bursary fund will not be used by Dove House School Academy Trust for any reasons which would give them a competitive advantage over other institutions, such as:

- Enrolment or administration fees imposed by Dove House School Academy Trust
- Fees for access to facilities at Dove House School Academy Trust
- Block subsidy of the canteen
- Block subsidy of transport, or support for travel for all students regardless of family income
- Block provision of equipment, material or books
- Paying bonus payments to reward attendance or achievement
- Payments to support student's general living costs

Block payments to students for attendance, irrespective of their actual financial need, will not be paid.

The bursary fund will only be used for supporting students who have a genuine financial difficulty which might prevent them from continuing in education, rather than acting as an incentive for attendance or as a marketing tool.

### **Complaints and appeals**

Complaints made regarding Dove House School Academy Trust's provision of support will be dealt with in accordance with the procedure set out in the Complaints Policy.

### **Monitoring and review**

This policy will be monitored by the Finance and Resources Director.

This policy will be reviewed annually by the Finance and Resources Director and by the Governance Lead and will be approved by the Headteacher.

## Appendix 1: 16-19 Bursary Fund Assessment Checklist 2021-22

We will use this checklist when assessing student applications for support from the 16 to 19 Bursary Fund.

### 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 (bus pass, meal vouchers, books or equipment purchased on student's behalf). Receipts should be retained.
- Award letter issued to student confirming the amount of support, what support will be made in-kind and payment conditions.

### Discretionary bursary

- Evidence to confirm the student meets the institution's 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 (bus pass, meal vouchers, books or equipment purchased on student's behalf). Receipts should be retained.
- Award letter issued to student confirming the amount of support, what support will be made in-kind and payment conditions.



## Appendix 2: 16-19 Bursary Application Form

### 16–19 VULNERABLE BURSARY APPLICATION FORM

This form should be used by students when applying for a 16–19 bursary. The form should be completed by the student. However, the declaration should be signed by both the student and their parent/carer to indicate that the information given in the form is correct and up-to-date.

#### Student details:

Personal details		
Full Name:		
Date of birth:		
Home address (including postcode):		
Home telephone no:		
Mobile telephone no:		
Email address:		
Residency status:  (you will need to provide proof of status)	<input type="checkbox"/> I confirm that I have legally lived in the UK for the 3 previous years before my course start date OR <input type="checkbox"/> Refugee <input type="checkbox"/> Asylum Seeker <input type="checkbox"/> Humanitarian Protection <input type="checkbox"/> Settled Status <input type="checkbox"/> Leave to remain <input type="checkbox"/> Other	
Parent/Carer details		
	Parent/Carer one	Parent/Carer two
Full Name:		
Relationship to student:		
Home address (including postcode):		
Telephone no:	Home  Work  Mobile	Home  Work  Mobile

Email address:		
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### Bursary applicable:

Students who qualify for a Vulnerable Bursary are entitled to up to £1,200. Students who are eligible for a Discretionary Bursary are assessed individually and funding allocated to those students who are most in need of financial support.

Each application will be assessed individually by Dove House School Academy Trust.

Student welfare			
Tick all of the below criteria that apply to you, as appropriate.			
Vulnerable Bursary	I am a student in care	<input type="checkbox"/> Yes	<input type="checkbox"/> No
	I am a recent care leaver	<input type="checkbox"/> Yes	<input type="checkbox"/> No
	I am in receipt of Income Support or Universal Credit	<input type="checkbox"/> Yes	<input type="checkbox"/> No
	I am in receipt of both Disability Living Allowance or Personal Independence Payments and Employment Support Allowance or Universal Credit	<input type="checkbox"/> Yes	<input type="checkbox"/> No
	I am on a course which has a duration greater than 30 weeks	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Discretionary Bursary	I am (or have previously been) eligible for Free School Meals	<input type="checkbox"/> Yes	<input type="checkbox"/> No
	My total gross household income is less than £16,190	<input type="checkbox"/> Yes	<input type="checkbox"/> No
	I have additional responsibilities e.g. young carer or parent	<input type="checkbox"/> Yes	<input type="checkbox"/> No
	I am from a single parent family or have two or more dependent siblings in my family	<input type="checkbox"/> Yes	<input type="checkbox"/> No
	I am completing a placement where high cost specialist equipment and clothes are required	<input type="checkbox"/> Yes	<input type="checkbox"/> No
	Exceptional cases: I have a separate need, not identified (please provide further information)	<input type="checkbox"/> Yes	<input type="checkbox"/> No

If you have selected yes to any of these criteria, please provide suitable original documentation as evidence to support your claim and attach it to this form e.g. benefits letter, confirmation from FSM checking system. Any evidence will be photocopied, dealt with in the strictest confidence and the original will be returned.

If applying based on low-income household criteria please provide any of the following: 3 most recent Universal Credit monthly award statements, P60 (tax year ended April 2021), Last 3 months payslips for all household adults, Evidence of self-employment income (tax year ended 5<sup>th</sup> April 2021) or Accountants letter.

### What do you need financial assistance for?

Please fill out this section with as much detail as possible so Dove House School Academy Trust can assess what support will be contributed on your behalf.

<b>Categories</b>			
<b>Which items do you need help to pay for?</b>		<b>Details of what is needed and cost</b>	<b>How often and for how long?</b>
Transport/Travel:	<b>Yes/ No</b>		
Books and/or equipment:	<b>Yes/ No</b>		
Clothing, workwear and shoes:	<b>Yes/ No</b>		
Educational trips/visits:	<b>Yes/ No</b>		
School meal vouchers:	<b>Yes/ No</b>		
Other (please specify):	<b>Yes/ No</b>		

## Payment details:

Please note that Dove House School Academy Trust may choose to pay Bursary awards 'in kind' e.g. by purchasing text books, school meal vouchers, travel passes or equipment or may make payments directly into the student's bank account by BACS, in which case receipts will need to be provided.

Student's Bank or Building Society details	
Please fill out this table with the bank details of <u>your</u> bank account.	
Name of branch:	
Address of branch:	
Name of account holder:	
Sort code:	
Account number:	

N.B. Bursary payments should only be made to the student's bank or building society account. Payments can be made into a joint account **ONLY** if the student is a named account holder on said joint account. You must attach a current account statement to this form as evidence.

## General Data Protection Regulation (GDPR):

Any information given to Dove House School Academy Trust will be used for the purpose of processing your application for a 16-19 bursary. Dove House School Academy Trust has the duty to protect public funds that are handled by the school. The information provided in this form may be used to prevent and detect fraud. For the same reason, the information provided may be shared with third party organisations who handle public money. You will be informed if your information is being shared in accordance with the GDPR. The information will be held in accordance with storage requirements defined by the GDPR and will be held for as long as it is necessary.

## Declaration:

I confirm that the information provided in this application is true and accurate. I understand that any incorrect information provided will lead to the rejection of the 16-19 bursary application. If any information presented in the form changes, I will inform Dove House School Academy Trust immediately to ensure funding is allocated correctly. I understand that if I withdraw from the school I may be liable to pay back all or some of the monies awarded to me.

Name (Student):	Signed:	Date:
Name (parent/carer):	Signed:	Date:

Office use only	
Date application received:	
Date of bursary review:	
Evidence submitted?	
Has the learner's application been accepted or declined?	
Which categories have been approved?	<input type="checkbox"/> Transport/Travel <input type="checkbox"/> Books and/or Equipment <input type="checkbox"/> Clothing, workwear and shoes <input type="checkbox"/> Educational Trips/Visits <input type="checkbox"/> School meal vouchers <input type="checkbox"/> Other
Amount of Bursary agreed	£ _____
Reason for application being declined:	