APPENDIX 13

16-19 Bursary Fund Policy

This policy was approved and ratified by the Governing Body of

Cox Green School

on 20th October 2015

Signed: _____

Chair of Governors

Date: _____

Version	Authorisation	Approval Date	Effective Date	Next Review
1	Full Governing Body	03/12/13	03/12/13	Sept 2015
2	Full Governing Body	20/10/15	20/10/15	Sept 2017

Cox Green School: A company limited by guarantee; Registered in England, Company Number 07831255, Highfield Lane, Maidenhead, Berkshire, SL6 3AX.

Background

In March 2011, the Government announced a new 16-19 Bursary Fund scheme to provide financial assistance to those young people who face a financial barrier to continuing in education or training post-16.

This policy sets out the arrangements for how Cox Green School will prioritise and administer the 16-19 Bursary Fund in 2015/16.

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 aim(s).

The School will retain a **5%** of the 16-19 Bursary Fund in order to administer the fund.

The contact at the School for all 16-19 Bursary support/enquiries is Miss Kelly Burchmore.

General Eligibility

To be eligible to receive a Bursary, all young people must be aged 16, 17 or 18 at 31/08/15 and meet the EFA residency requirements as set out in document *EFA Funding Regulations for post-16 provision 2015 to 2016.* This document sets out the evidence that is required to confirm eligibility.

Bursaries Available

There are three types of Bursary available:

Level 1 - Vulnerable Bursary

A Vulnerable Bursary of **up to £1,200** is available to all young people who are identified as being:

- currently in care or care leavers (previously looked after for a period of at least 13 weeks since the age of 14)
- in receipt of Income Support (or Universal Credit) in their own right;
- getting Employment Support Allowance (ESA) and Disability Living Allowance (DLA) or Personal Independence Payments in their own right

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

- 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.

Level 2 - Discretionary Bursary

A Discretionary Bursary of up to **£600** is available, subject to availability of funds to all young people where:

- their **gross** annual household income, as assessed by HM Revenue & Customs, does not exceed **£16,190** and/or;
- where the young person, or a sibling, qualifies for Free School Meals (FSM), and/or;
- where the young person's parent/carer(s) are in receipt of one of the following:
    - Income Support
    - Income Based Jobseekers Allowance.
    - Employment Support Allowance.
    - Universal credit
    - Guarantee element of State Pension Credit.

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- Wider family circumstances e.g. single parent family, student carer, number of dependent children in household

Level 3 - Discretionary Bursary

If funds are available after allocation of the level 2 discretionary bursaries a discretionary Bursary of up to **£300** is available, subject to availability of funds to all young people where:

- their **gross** annual household income, as assessed by HM Revenue & Customs, does not exceed **£25,000** and/or;
- where the young person, or a sibling, qualifies for Free School Meals (FSM), and/or;
- where the young person's parent/carer(s) are in receipt of one of the following:
  - Income Support
  - Income Based Jobseekers Allowance.
  - Employment Support Allowance.
  - Universal credit
  - Guarantee element of State Pension Credit.
- Wider family circumstances e.g. single parent family, student carer, number of dependent children in household

Evidence

Acceptable supporting evidence for the **Level 2 and Level 3 Discretionary Bursaries** will be either:

- **A full T602E Tax Credit Award Notice** (TCAN) for the young person's household. This document from HM Revenue & Customs details entitlement to Tax Credits and shows total income for the year 6 April 2014 to 5 April 2015.
- **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 5 April 2015). The income will be shown as Total for year.
- **Payslips or Bank Statements** from the last 3 months for all adults in the young person's household**.**
- **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 5 April 2015). The income will be shown as Total for year.
- Other Income Support, Universal Credit award letters, pension awards etc.
- Confirmation from our FSM checking system that the applicant or a sibling is entitled to **Free School Meals**

Contingency Eligibility/Exceptional Circumstances

Subject to availability of funds, any young person meeting general eligibility requirements and facing financial hardship due to exceptional reason or circumstance change can apply to access the contingency funds on an individual basis by submitting an application in writing.
Any applications will be considered by the 16-19 Bursary Application Panel having taken guidance from the school SAFE Team.

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Payments

Subject to meeting the condition requirements as detailed below, payments will be made in the following instalments:

- Autumn Term (50%)
- Spring Term (25%)
- Summer Term (25%)

Payments will be made via BACS (Banker's Automated Clearing Services) 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.

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 the terms of the Sixth Form Code of Conduct 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.

Application

Applications for a Bursary must be made using the correct Application Form and should be submitted in full **as soon as possible**. 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.

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).

Process

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

- **Sixth Form Mentor – Miss Kelly Burchmore**
- **Information, Advice and Guidance Officer - Mrs Sara Mckay**
- **The students' Academic Mentor**

The Panel will review the application, supporting evidence and any other personal circumstantial evidence and young people will be notified of the outcome within **two weeks** of receipt.

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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**
- **Appointed Governor**

The Panel will consider and respond to appeals within **two 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 Complaint Procedure.

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.

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/guardian/carer(s) change (e.g. increase in household income that would affect the young person's entitlement to Free School Meals). 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.

Attachment 1 - Information for parent/guardian/carer(s)
Attachment 2 - Information for young people
Attachment 3 - Application Form

Signed: _____

Chair of Governors

Date: _____

Date of Review:_____

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Cox Green School
16-19 Bursary Fund 2015/16
Information for Parent/Guardian/Carer(s)

1. **What is the 16-19 Bursary Fund**

In March 2011, the Government announced a new 16-19 Bursary Fund scheme to provide financial assistance to those young people who face a financial barrier to continuing in education or training post-16.

2. **What is it for?**

The 16-19 Bursary is a limited fund made available for supporting eligible young people with the costs of transport, food, books, educational visits or other course materials or equipment essential to successfully completing their programme of study.

3. **Who is it for?**

The 16-19 Bursary is targeted towards those young people considered most in need of financial support. The Government has identified a priority group of young people and have asked that Schools give priority to this group first and offer them a **Vulnerable Bursary**. After this group has been considered, the School expect to have a small amount of funding available for other young people in need of financial support. The School has set **eligibility criteria** to ensure the remaining funds go to those who are seen to need it most. Any young person who meets these eligibility criteria can apply for one of 2 levels of **Discretionary Bursaries**.

4. **What are the eligibility criteria?**

Young people can apply for a Bursary if they are aged 16, 17 or 18 at 31st August 2015, meet the national residency requirements and at least one of the criteria listed below.

Level 1 Bursary - They can apply for a **Vulnerable Bursary** if they are:

- currently in care or care leavers (previously looked after for a period of at least 13 weeks since the age of 14)
- in receipt of Income Support (or Universal Credit) in their own right;
- getting Employment Support Allowance (ESA) and Disability Living Allowance (DLA) or Personal Independence Payments in their own right

Level 2 and 3 Bursaries - They can apply for a **Discretionary Bursary** if either:

- your gross annual household income, as assessed by HM Revenue & Customs, does not exceed £16,190 (Level 2) or £25,000 (Level 3) and/or
- they, or a sibling, qualify for Free School Meals (FSM), and/or;
- you are in receipt of one of the following:
  - Income Support
  - Income Based Jobseekers Allowance.
  - Employment Support Allowance.
  - Universal credit

- Guarantee element of State Pension Credit.

- Wider family circumstances e.g. single parent family, student carer, number of dependent children in household

5. **Can they still apply if they don't meet the eligibility criteria?**

Yes, providing they meet the age and residency eligibility criteria. The School is keeping back some of the available 16-19 Bursary Fund for exceptional circumstances for one-off payments or additional support.

6. **How and when do they apply?**

To apply, they must complete the **16-19 Bursary Fund Application Form** and submit this to Miss Burchmore with the correct **supporting evidence.**
For those students already in receipt of the Bursary, supporting documents will need to be supplied <u>each year</u> in order for the Bursary to be continued.

7. **How much is the Bursary?**

The **Level 1 Vulnerable Bursary** is up to £1,200, the **Level 2 Discretionary Bursary** is up to £600 and the **Level 3 Discretionary Bursary** is up to £300. The exact amount is dependent on individual circumstances and funds available.

8. **Will the Bursary affect any benefits I may be receiving?**

No, it will not affect any benefits or financial support you are receiving from elsewhere.

9. **How and when does it get paid?**

If your young person applies and is successful, they will need a **Bank Account** in their own name for the money to be paid into. It will be paid in three instalments: **Autumn Term** 2015 (50%), **Spring Term** 2016 (25%) and **Summer Term** 2016 (25%) subject to them meeting the terms of the Sixth Form Code of Conduct.

10. **How do I find out more?**

If you wish to make an application please request a full application pack from the Sixth Form Office which can be contacted directly on 01628 629415 ext 367 or log onto the Cox Green School-Sixth Form Website. The application pack will contain the **16-19 Bursary Fund Policy** which provides further information, including details on eligibility criteria and **supporting evidence** needed. Alternatively you can talk in confidence to Miss Burchmore if you need help making an application.

Cox Green School
16-19 Bursary Fund 2015/16
Information for Young People

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The 16-19 Bursary is targeted towards those young people considered most in need of financial support. The Government has identified a priority group of young people and have asked that Schools give priority to this group first and offer them a **Guaranteed Bursary**. After this group has been considered, the School expect to have a small amount of funding available for other young people in need of financial support. The School has set **eligibility criteria** to ensure the remaining funds go to those who are seen to need it most. Any young person who meets these eligibility criteria can apply for a **Discretionary Bursary**.

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Level 2 and 3 Bursaries - You can apply for a **Discretionary Bursary** if either:

- Your gross annual household income, as assessed by HM Revenue & Customs, does not exceed £16,190 (Level 2) or £25,000 (Level 3) and/or
- You, or a sibling, qualify for Free School Meals (FSM), and/or;
- Your parent/carer(s) receive a certain type of income based benefit.
- You have wider family circumstances e.g. single parent family, student carer, number of dependent children in household

5. **Can I still apply if I don't meet the eligibility criteria?**

Cox Green School
16-19 Bursary Fund 2015/16
Information for Young People

Yes, providing you meet the age and residency eligibility criteria. The School is keeping back some of the available 16-19 Bursary Fund for exceptional circumstances for one-off payments or additional support.

6. **How do I know if I am eligible?**

You will need to discuss this with your parent/guardian/carer(s). If you need help to do this, or are not sure what to ask, you can talk in confidence to Miss Burchmore. There is also an Information for Parent/Guardian/Carer(s) document you can take home, which may help.

7. **How and when do I apply?**

To apply, you must complete the **16-19 Bursary Fund Application Form** and submit this to Miss Burchmore with the correct supporting evidence.
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Cox Green School
16-19 Bursary Fund Application 2015/16

Student Details

Surname	
Forenames	
Address	
Postcode	
Date of Birth	

Level Required - Please tick which level of payment you are applying for:

Level 1 – Identified vulnerable students eligible for £1200.00 bursary	
I am a young person in care	
I am a young care leaver	
I am in receipt of Income Support or Universal Credit	
I am in receipt of both Disability Living Allowance (or Personal Independence Payments) and Employment Support Allowance (ESA) (or Universal Credit as a replacement to ESA)	

Level 2 – Identified students eligible for a discretionary bursary of up to £600	
I am in receipt of Free School Meals	
My total household income is less than £16,190	
Level 3 – Identified students eligible for a discretionary bursary of up to £300	
My total household income is more than £16,190 but less than £25,000	

Cox Green School
16-19 Bursary Fund Application 2015/16

Household Income *(Required for Level 2 and Level 3 applications)*

Please include the required **original** supporting documentation with this form. All evidence will be photocopied and dealt with strictest confidence. (*Please do not send any original documentation in the post. The students should bring this directly to Miss Burchmore in the Sixth Form Office who will photocopy and return ASAP).*

My total household income is:	£

Please tick the supporting documentation provided

Receipt of benefit	
P60 (*tax year 2014-2015*)	
Full Tax Credit Award (T602E) for *tax year 2014-2015*	
Evidence of self-employment income (*tax year 2014-2015*)	
Last 3 months Payslips for all household adults	
Last 3 months banks statements for all household adults	

Bank Account Details

Bursary payments will be made via BACS payment direct to a bank account in the students name.

Please complete the bank account details required.

Student Bank or Building Society details

Full name of Account Holder *(This should be as it appears on your cash or debit card, or statement)*	
Name of Bank/Building Society	
Branch	
Sort Code	___ ___ -- ___ ___ -- ___ ___
Account Number	___ ___ ___ ___ ___ ___ ___ ___

Cox Green School
16-19 Bursary Fund Application 2015/16

Your account number may not be the same as the cash or debit card number; you can find it on a bank or building society statement. Most account numbers are 8 digits long. If you are unsure your bank or building society can advise you.

Sixth Form Office use only	
Date application received	
Date application reviewed	
Supporting documentation provided, photocopied and returned	
Level of Bursary agreed	