



Kendrick School

16-19 Bursary Fund Policy 2023-24

Version: BFP V1 2021	
Version: BFP V2 2022	
Version: BFP V3 2023	

Summary of key actions for parents/carers and students
1. Read the policy to ensure the eligibility criteria and due dates are met – parents/carers and students
2. Submit application form and supporting evidence by 16/09/2023 - parents/carers only
3. Submit student bursary assessment form and supporting evidence by 16/09/2023 – students only

Bursary Policy 2023-24

1. Background

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

The School is committed to ensuring the Bursary 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).

To comply with the latest ESFA 16-19 Bursary Fund guidance Kendrick School will ensure that full supporting evidence for each application is available and that the award is made as per the funding regulations document.

The named contacts at the School for all 16-19 Bursary support/enquiries are Ms Le Croisette and Mrs Gill Hearn.

2. Bursaries Available

There are two types of Bursary available:

A. Vulnerable Student Bursary

A Vulnerable Student Bursary is available to all young people who meet the general eligibility criteria *and* who have been identified as being in a vulnerable group, as set out in this policy. Vulnerable young people (those in care; care leavers; young people receiving Income Support and young people receiving both Disability Living Allowance and Employment Support Allowance) – up to £1200 per year

B. 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. The amount of Discretionary Bursary received will vary from student to student, depending on, for example, eligibility based on household income, and their actual financial needs such as the distance they need to travel and the requirements of their study programme.

C. Emergency Food

Kendrick School can use the Bursary Fund in individual cases of severe hardship, to provide food support whilst a student attends their study programme, for a student they consider to be in real need, without undertaking the checks on household income or gathering other

evidence that would normally be required. It is expected to only apply to a very small number of the total 16 to 19 student cohort and not on an on-going basis.

1. Bursary Amounts

The 16-19 Bursary Fund is a limited fund determined by the Education Skills Funding Agency (ESFA). For 2023-24 the School has been allocated a total 16-19 Bursary Fund of **£7,748**. Kendrick School will manage the number and size of discretionary bursary awards to keep within budget.

The School will retain up to 5% of the 16-19 Bursary Fund to administer the fund and to use as a hardship contingency fund to respond to exceptional or circumstantial in-year change. The contingency fund will be reviewed in April 2024 and any remaining funds will be considered for distribution to eligible young people based on their individual needs on a case by case basis towards the end of the academic year.

The Vulnerable Student Bursary amount will be £1200

A proportion of any Bursary may be retained by the School and used to support the central costs of books, equipment, and educational trips.

Students in receipt of bursary funding will be identified on the school census.

2. General Eligibility

To be eligible to receive a Bursary, all young people must be aged 16, 17 or 18 at 31/08/2023 and meet the ESFA residency requirements.

Age Criteria:

- Must be 16 or over but under 19 as at 31/08/2023.
- Students 19 or over may receive a discretionary bursary if they are still on a programme they began between 16-18 or they have an EHCP (Education, Health & Care Plan) Students over 19 are not eligible for a 'Vulnerable Groups' bursary)
- Students between 14-16 may be awarded a discretionary bursary if they are following an accelerated study programme but NOT if they are attending college as part of a KS4 programme.

Educational Eligibility:

- Students must be undertaking provision that is funded by the ESFA and subject to inspection by a public body (Ofsted)
- Students on Apprenticeship Programmes, undertaking distance learning provision or in waged training are NOT eligible for the bursary.

Residency:

- Students must have legally lived in the UK for the three previous years. For the small number of eligible students who do not meet this test, institutions should take steps to satisfy themselves that the student is legally resident in the UK.

3. Additional Eligibility for Vulnerable Student Bursary

Students who are deemed to be in ‘Vulnerable Groups’ should be awarded support based on an individual assessment of the type of costs they incur but no more than £1200 per year.

‘students should only receive the amount they actually need to participate, and institutions should NOT automatically award students £1200 if they do not need the full amount’

Students who are deemed to be in ‘Vulnerable Groups’ must also be undertaking a study programme of at least 30 weeks or more. (below 30 weeks they should receive a pro-rata award. The amount of study hours per week should be taken into consideration when deciding on an award amount and the payment may be pro-rata for students studying less hours than others)

Definitions of Vulnerable Groups are as follows: -

- In Care
- Care Leavers
- Receiving Income Support or Universal Credit because they are supporting themselves or themselves and a dependent who lives with them (Child/Partner)
- Receiving Disability Living Allowance or Personal Independence Payments in their own right
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More detailed criteria for identifying ‘Vulnerable’ students is available in the 2022-23 guidance document as is the definition of ‘evidence’ to support their bursary application.

Target Group	Evidence Required
<p>Looked after Children, or previously looked after children, i.e. cared for by the Local Authority</p> <p>Most Looked After Children have, or will have had a social worker.</p>	<p>A letter from your Social Worker, Key Worker or Local Authority</p>
<p>In receipt of Income Support</p> <p>Or</p> <p>In receipt of Universal Credit in your own name</p>	<p>A letter dated within 3 months from Job Centre Plus</p> <p>This letter needs to confirm your name, address and that you receive Income Support/Universal Credit</p> <p>If you have a letter older than 3 months, please also provide a bank statement that shows a payment going into your account within the last 3 months</p> <p>We cannot accept a letter older than 3 months without the support of a bank statement</p>

4. Additional Eligibility for Discretionary Bursary

A Discretionary Bursary is available, subject to availability of funds, to all young people to support the student's participation in their learning programme paying towards:

- The cost of travel passes (to/from school)
- Essential books / equipment / clothing (e.g., protective overalls)
- Field Trips as part of the learning programme
- The cost of attendance at industry placements
- The cost of attending University Interviews and Open days
- Vouchers or credits for meals

The funding cannot be used to support:

- Counselling or Mentoring
- Extra-curricular activities that are not essential to the student's learning programme
- Low household/family incomes
- Bonus payments for rewarding attendance or achievements
- General living costs of the student
- Block canteen subsidies
- Block equipment/book/resource provision
- Block travel subsidies

Audit Requirements

Auditors will be looking for evidence of the following as required by the ESFA:

- Total number of applications received in the year
- Value awarded for each application
- Purpose of the funding request from the Student
- Brief justification from the School on how the individual award decision was reached

(How was the student's application assessed (what criteria was used) / how was the award amount arrived upon etc.)

- The amount of unspent funds remaining and carried forward to the next academic year

Supporting documentation they will also require

- Policy/Statement on Bursary Funding
- Application Form
- Application & Assessment Process
- Copies of any signed agreements from the Student accepting the conditions of payment

In addition, for the Vulnerable Groups: -

- Any funding claims submitted to the Student Bursary Support Services (SBSS)
- Evidence of Eligibility for the relevant category
- Evidence of any SBSS payments received (remittance advices)

- The Assessment of the individual student's financial need
- Evidence of payments made or support in-kind provided

In addition, for the Discretionary Bursary: -

- Evidence used for eligibility & to determine household income
- The Assessment of the individual student's financial need
- Evidence of payments made (and receipts from the student) or support in-kind provided

5. Contingency Eligibility

Any young person meeting general eligibility requirements and facing financial hardship due to exceptional reasons or their circumstances change can apply to access the contingency funds on an individual basis by submitting an application in writing.

6. Those Not Eligible

Applications to the 16-19 Bursary Fund are not open to young people aged under 16 years or over 19 years of age at 31 August 2022.

To be eligible to receive a bursary in the 2022/23 academic year a student must be aged 16 or over but under 19 at 31 August 2022. Students aged 19 or over are only eligible to receive a discretionary bursary if they are continuing on a study programme they began aged 16 to 18 ('19+ continuers') or have an Education, Health and Care Plan (EHCP).

These two groups of aged 19 plus students can receive a discretionary bursary while they continue to attend education (in the case of a 19+ continuer, this must be the same programme they started before they turned 19), as long as their eligibility continues and their institution considers they need the additional support to continue their participation.

Students aged 19 or over are not eligible for bursaries for vulnerable groups.

7. Bursary Funding Levels - 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.

Acceptable supporting evidence for the Vulnerable Student Bursary will be:

- Currently in or have recently left local authority care or are under a care order

- In receipt of Universal Credit or Income Support (because they are financially supporting themselves)
- Receiving Disability Living Allowance and either Employment & Support Allowance (ESA) or Universal Credit
- Receiving Personal Independence Payments and either ESA or Universal Credit

Acceptable supporting evidence for the Discretionary Bursaries

Discretionary Tier 1

The Award amount can be up to a maximum of £500 per annum and is available to students who are:

- currently or have in the past 6 years been receiving Free School Meals (FSM) (Ever 6)
- Become eligible for FSM during the course of the academic year
- Are children of Service Personnel (Ever 4)
- Are a Young Carer as designated by the Children's Support Team.

FSM entitlement applies if parents of students or students themselves receive any of the following:

- Income Support, Income based job seekers allowance or Income related Employment & Support Allowance
- Support under Part VI of the Immigration & Asylum Act 1999
- The guaranteed element of State Pension Credit
- Child Tax Credit (providing they are not entitled to Working Tax Credit) and have an annual income of less than £16190
- Working Tax Credit run-on (paid for 4 weeks after you no longer qualify for Working Tax Credit)
- Universal Credit (If you applied on or after 1st April 2018 your household income must be
- less than £7400 a year after tax and excluding any benefits received)

Discretionary Tier 2

The Award amount can be up to a maximum of £200 per annum and is available to students who are not eligible for the Vulnerable Bursary or the Discretionary Tier 1 Bursary Levels and whose gross family household income is below £25000 per annum. This category can also be used to apply for 'one-off' applications.

Proof of Income

Evidence will be required to support an application for discretionary bursaries and may include taking account of household income as evidenced by receipt of Tax Credits Forms TC602, evidence of income from self-employment, a P60 or 3-6 months' worth of bank statements. Unearned income (shares, investments, savings) may be considered when assessing awards.

Receipt of bursary funding does not affect receipt of other means-tested benefits paid to families, such as IS, Jobseeker's Allowance, Child Benefit, Working Tax Credit, Housing Benefit or, generally, Universal Credits.

Payments

Kendrick School will, where possible, pay bursaries in-kind rather than cash. This helps ensure that the bursary is spent for the reasons it was awarded. In-kind payments can include travel passes, vouchers or credits for meals, required books and required equipment. The value of the in-kind payments will be deducted from their total bursary award. Kendrick will try and avoid making large lump sum bursary payments to students.

Subject to meeting the condition requirements as detailed below, payments will be 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.

Students should provide receipts for expenditure and purchases made with the Bursary Fund which will form part of the audit and assurance process. For standard weekly costs like travel and food receipts these will be evidenced initially by the submission of receipts and thereafter at various points in the academic year.

Individual claims can be made at any time for the following:

- Books, Materials and Equipment
- Re-sit Exam Fees.
- Transport costs to and from school.
- Uniform purchases.
- Industry relevant trips
- Any other expenditure to support the student's education

Kendrick School may choose, where feasible, to purchase books and equipment for a student which must be returned at the end of their study programme.

Bursary Amounts

- The Vulnerable Student Bursary is £1,200,
- Discretionary Bursary Tier 1 is up to £500
- Discretionary Bursary Tier 2 is up to £200.

The exact amount is dependent on individual circumstances and will take into account their actual financial needs and funds available. Additional financial support may be given if funding allows.

Where funding allows the 16-19 Bursary funds will be used to support educational visits and learning resources required by the school via the school's ParentPay facility. Any additional financial assistance is subject to the availability of funds and meeting the eligibility criteria upon receiving appropriate evidence. If funding allows an additional needs-based payment may be made to the student towards the end of the academic year (Term 6).

8. Qualifying Condition Requirements

Eligible young people will need to complete a qualifying learning period of six 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.

9. Residency

Students must meet the residency criteria in ESFA funding regulations for post-16 provision in the 2022/23 academic year. This document also specifies the evidence institutions must see and retain for audit to confirm eligibility.

10. Application

Applications for a Bursary must be made using the correct Application Form and should be submitted in full no later than **September 16th 2023**. Mid-year applications may still be accepted for students joining the school mid-year or where there are changes in circumstances but any award granted will be made on a pro-rata basis. However, once the Bursary Fund has been used, it will not be possible to consider further applications.

All students are required to complete a 16-19 Bursary Assessment Form, which provides evidence of their actual financial expenditure, as well as an Application Form.

The Assessment Form will provide evidence to assess a student's actual financial need and must be completed by all students and submitted in full no later than **September 16th 2023**.

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/ carer(s).

11. Process for Assessment and Awards

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

- a. Ms Le Croisette - Assistant Headteacher
- b. Mrs Hearn – Head of Sixth Form
- c. Mrs Sandy – School Business Manager

The Panel will review the application, supporting evidence and any other personal circumstantial evidence and young people will be notified in writing of the outcome within ten working days of receipt.

As funds are limited there are no guaranteed awards. All awards will be allocated on the basis of the funding available at the time of the application and the needs based assessment of the individual student.

12. Appeals

If any young person or their parent/ carer(s) are not satisfied with the outcome of their application, they should write to the Headteacher outlining their reasons why within 10 term time working days . The Headteacher will convene a 16-19 Bursary Appeals Panel, consisting of:

- a. Ms Kattirtzi – Head Teacher
- b. Mr Simmonds - Deputy Head Teacher

The Panel will consider and respond to appeals within ten working days 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 Chair of Trustees.

13. 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/ carer(s) will be told the reasons why this is necessary prior to sharing any information further.

14. 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 /carer(s) change (e.g. change in Universal Credit awards, 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.

15. 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 aim(s).

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 aim(s).

16. 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.

17. Supporting Documents

In addition to this policy being openly shared with all young people and their parent/ /carer(s), the following documents will be used in the 16-19 Bursary process:

1. 16-19 Bursary Policy
2. Application Form
3. 16-19 Student Bursary Assessment Form

18. Further Information

Further national information on the 16-19 Bursary Fund can be found:

- The Department for Education website
- Directgov:www.direct.gov.uk/16-19bursary