

TITLE: DRAFT 16-19 Bursary Fund Policy	REF: GOV113	VERSION: Version 2
APPROVAL BODY: Policy Committee	DATE: 25.05.23	REVIEW DATE: 31.08.25
LEAD PERSON: Executive Team		
VERSION	REVIEWER/APPROVAL	REVIEW NOTES
1	Policy Committee	New Policy
2 Executive Team	Executive Team/CEO	Reviewed

## 16-19 Bursary Fund Policy

Our vision at Activate Learning Education Trust is “transform lives through learning’ by igniting confidence, expanding opportunities, energising the community, and generating prosperity. Through [our Learning Philosophy](#) and core values of empowerment, enterprise, connectedness and transformation, we will provide our students and staff with a safe and supportive environment in which to thrive

[Our Learning Philosophy](#) is rooted in the dynamics between the brain, motivation, and our emotions.

### Policy Statement

This policy sets out expectations regarding 16-19 Bursary Fund

### Principles

- We believe that every learner is important and may have needs that require teaching and learning environment and resources reasonable adaptation.
- The most impact in learning happens when learners know why, how etc therefore we seek to provide learning through practical experience etc.
- As an organisation we seek opportunities to embed learning and make knowledge and skills relevant to the learning.

This policy is linked to:

## Contents

Principles .....	1
1. Aims .....	2
2. Guidance.....	2
3. Definitions .....	2
4. Roles and responsibilities .....	2
5. How we use the Bursary Fund .....	2
6. Eligibility criteria .....	3
7. 7. Payment.....	5
8. 8. Monitoring arrangements .....	5

---

## **1. Aims**

Our Trust and schools aim to:

- Have clear and transparent processes for the use and allocation of 16 to 19 Bursary Funds
- Make clear to parents and students the type of support which is available and the means of applying for it

## **2. Guidance**

This policy is based on advice from the Department for Education on the March 2022 guidance.

This policy complies with our funding agreement and articles of association.

## **3. 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). Section 22 of the Children Act 1989 defines the term 'looked after child'
- '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 of 13 weeks), which began after the age of 14 and ended after the age of 16)

## **4. Roles and responsibilities**

### **4.1 The Trust board**

The Trust board has overall responsibility for approving the 16 to 19 Bursary Fund policy, but can delegate this to a committee, an individual governor or the headteacher.

The Trust board also has overall responsibility for monitoring the implementation of this policy.

In our Trust, responsibility for approving the 16 to 19 Bursary Fund policy has been delegated to the Heads/Principals

In our Trust, monitoring the implementation of this policy has been delegated to local governing bodies.

### **4.2 The headteacher/principal**

The headteacher/principal is responsible for ensuring staff are familiar with the 16 to 19 Bursary Fund policy, and that it is being applied consistently. Final authorisation is at the discretion of the Headteacher/Principal.

### **4.3 Staff**

Our staff are responsible for implementing the 16 to 19 Bursary Fund policy consistently.

The senior leadership team will provide staff with appropriate training in relation to this policy and its implementation.

### **4.4 Parents**

Parents are expected to notify staff or the headteacher of any concerns or queries regarding the 16 to 19 Bursary Fund policy.

### **4.5 Students**

Are responsible for providing accurate information, adhering to the conditions for receipt of bursary payments, and notifying the school of any changes to circumstances which may affect their eligibility.

## **5. How we use the Bursary Fund**

Support is available to eligible students from the 16 to 19 Bursary Fund. See section 6 below for details of our eligibility criteria.

The fund is intended to support students aged 16 to 19 in overcoming specific barriers to participation so they can remain in education.

- We use the fund to provide students with support to fund:
  - Transport
  - Books
  - Equipment
  - Field trips and other course-related costs
  - The costs of attending university interviews and open days
  - Industry placements

## 6. Eligibility criteria

### 6.1 Age

- To be eligible:
  - A student must be aged 16 or over but under 19 on the final day of August
- Students 19 or over must either:
  - Be continuing on a study programme they began aged 16 to 18, or
  - Have an Education, Health and Care Plan (EHCP)
  - Students aged 19 or over are not eligible for bursaries for defined vulnerable groups.

### 6.2 Eligible education provision

- Students must be participating in provision that is subject to inspection by a public body that assure quality (e.g. Ofsted). The provision must also be either:
  - Funded directly by ESFA or by ESFA via a local authority
  - Funded or co-financed by the European Social Fund
  - Publicly funded and lead to a qualification (up to and including level 3) accredited by Ofqual or on the ESFA list of qualifications approved for funding 14 to 19
  - In a 16 to 19 traineeship programme
  - Non-employed and participating in a Prince's Trust Team Programme
- Students are not eligible if:
  - They are on an apprenticeship programme
  - Are on any waged training
- Students who are studying via distance learning may need infrequent financial help (e.g. travel to exams), if this is the case we will provide support in-kind (e.g. a travel pass) and this is reviewed on a case by case basis.

### 6.3 Residency

Students must meet the residency criteria in the [ESFA funding regulations for post-16 provision](#).

### 6.4 Asylum seekers

- Those under 18 with an adult relative or partner and those aged 18 and above:
  - Are entitled to education
  - Are not entitled to public funds
  - Can apply to the Home Office for suitable housing and cash for essentials

We will provide in-kind support such as books, equipment and a travel pass to asylum seekers who have not had asylum refused.

- Unaccompanied children:

- Are the responsibility of the local authority
- Are to be treated as 'looked after' children
- Are eligible for a bursary for vulnerable groups

When these students reach 18 we will consider their immigration status. They will still be eligible for a bursary if the asylum claim is in their favour and will be treated as a 'care leaver' until they reach the upper age limit.

## 6.5 Bursaries for young people in defined vulnerable groups

Students who meet one of the following 4 criteria below, in addition to the above age and residency criteria, can apply for a bursary for vulnerable groups of up to £1,200 per year.

- The defined vulnerable groups are students who are:
  - In care (those who are privately fostered are **not** classed as looked after)
  - Care leavers
  - Receiving Income Support, or Universal Credit because they are financially supporting themselves or, financially supporting themselves and someone who is dependent on them and living with them such as a child or partner
  - Receiving 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

We will look at individual cases for these students, based on needs. Students will only receive the amount they actually need to participate and not automatically receive £1,200 if they do not need the full amount.

Students eligible for bursaries under this category will be given a pro rata bursary if their study programme lasts for less than 30 weeks.

- We will obtain the following **proof of eligibility** for vulnerable groups:
  - For students who are in care or a care leaver, written confirmation of their current or previous looked-after status from the relevant local authority. The evidence could be a letter or an email but must be clearly from the local authority
  - For students in receipt of Income Support or Universal Credit, a copy of their Income Support or Universal Credit award notice. This must clearly state that the claim is in the student's name/confirm they are entitled to the benefits in their own right. The evidence must not state any conditions that prevent them from participating in further education or training
  - For students in receipt of Universal Credit (UC), a tenancy agreement in the student's name, a child benefit receipt, children's birth certificates, utility bills etc.
  - For students receiving UC/Employment and Support Allowance and Disability Living Allowance and Personal Independence Payments, a copy of their UC claim from DWP (UC claimants should be able to print off details of their award from their online account). Evidence of receipt of Disability Living Allowance or Personal Independence Payment, must also be provided

## 6.6 Discretionary bursaries

- In assessing an application for a discretionary bursary, we will consider:
  - Level of household income
  - Distance to travel between the student's home and the institution
  - The number of dependent children in the student's household
  - Whether the student has additional responsibilities that may mean they need extra help
- To assess household income, we will ask to see:
  - Proof of benefits letters
  - Tax credit award notifications
  - P60s
  - Pay slips.
  - Bank statements covering a certain period (e.g. the last 3 months)
  - Universal Credit award notices (e.g. the most recent 3)

## **7. Payment**

### **7.1 Process**

Payments are made three times per year using the following process:

- Make in-kind payments, such as travel passes or vouchers for meals or books.
- Make termly payments by BACS transfer to the student's bank account.

Applications should ideally be submitted by 23rd October to make sure enough time is allocated to assess the overall level of demands and make discretionary awards on a fair basis. This date will be clearly stated on the application form. However, as students' circumstances may change, the application process will remain open for the whole school year.

### **7.2 Conditions for the receipt of bursary payments**

Payments are conditional on students meeting the following conditions in relation to their standards of attendance and behaviour:

- Attendance of 85% minimum and pro-rata above that to 97%
- Following the school's sixth form code of conduct

All students are required to sign a declaration confirming that they agree to these conditions.

Students who fail to meet these conditions may have their payment withheld.

We will consider the impact on attendance that might be caused by illness, caring responsibilities or other exceptional circumstances.

We will stop payments where students have been absent for a period of 4 continuous weeks or more (excluding holidays, or if there is evidence that the student intends to return).

As much as possible, we will avoid sanctioning a student to the extent that their Bursary Funding had been stopped for a whole term.

We reserve the right to take back money from students where it is not spent for the reasons it was awarded.

We will consider the impact of such an action on the individual student before taking a final decision to do so.

Any paperwork and documents we retain for audit purposes (for example, copies of application forms, documents as evidence and any agreements signed by students) will be kept securely in line with our data protection policy, privacy notices and record retention schedule.

## **8. Document retention**

Any paperwork and documents we retain for audit purposes (for example, copies of application forms, documents as evidence and any agreements signed by students) will be kept securely in line with our data protection policy, privacy notices and record retention schedule.

## **9. Monitoring arrangements**

This policy will be reviewed by the Head of Governance and Compliance every year. At every review, the policy will be approved by ALET policy committee.