



Bishop Chadwick Catholic Education Trust
16-19 Bursary Fund Policy

Adopted by:
St. Joseph's Catholic Academy

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Statement of intent

At St. Joseph's Catholic Academy, we are committed to closing the attainment gap between students from disadvantaged and more advantaged backgrounds, and ensuring that every young person participates in, and benefits from, a place in 16-19 education and training.

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 publicly available via the school website and the Head of 6th Form.
- Widening access to, and participation in, 16-19 education and training.
- Monitoring and reviewing our policies to ensure effectiveness.
- Ensuring adequate resources are available to implement policies, as much as is reasonably practicable.
- Supporting all pupils and students within our schools to become the best possible version of themselves and achieve their potential.

1. Legal framework

- 1.1. This policy has due regard to all relevant legislation and statutory guidance including, but not limited to, the following:
 - ESFA (2021) '16 to 19 bursary fund guide 2021 to 2022 academic year'
 - The Equality Act (2010)
- 1.2. This policy will be implemented in conjunction with the following policies:
 - Complaints Policy
 - Attendance Policy
 - School Behaviour Policy

2. The academy's responsibilities

- 2.1. The academy will be responsible for setting eligibility criteria for students at the institution.
- 2.2. The academy will set conditions for receiving the bursary, such as regular attendance.
- 2.3. Arrangements for applying for bursaries will be straightforward and confidential.
- 2.4. The needs of each student who applies for the bursary will be assessed by the academy and evidence will be obtained to support each application.
- 2.5. The academy will claim vulnerable bursaries from the Student Bursary Support Service (SBSS) for each eligible student.
- 2.6. Records will be kept by the academy of all assessments and payments.
- 2.7. The application process will maintain confidentiality.
- 2.8. The academy will comply with the requirements of the Equality Act (2010) when setting its criteria and will not discriminate against students because of their protected characteristics.
- 2.9. The academy will inform the ESFA of the total amount of any unspent funds (not previously reported) from any year up to and including the 2019/2020 academic year, emailing enquiries to enquiries.esfa@education.gov.uk no later than 31 March each year.
- 2.10. The academy will ensure it completes the new Individualised Learner Record (ILR) or census fields to provide data on the number of students participating in extended work placements.

3. Raising awareness and take-up of the 16-19 bursary fund

- 3.1. To raise awareness of the bursary, the academy will employ different marketing activities, including the following:
 - Posting information about the bursary on the school website and in the prospectus
 - Distributing information at open evenings for Year 11 pupils.
 - Providing further information, such as the application form and details of the bursary, following enrolment for all new entrants to the academy in an enrolment pack,
 - Working with local support services to target potential eligible students and providing them with the necessary information
 - Providing tutors with information to inform discussions between tutors and students.
- 3.2. The academy will use the [Key to Success](#) website to establish whether students were in receipt of the pupil premium in Year 11 or received SEND support, which may indicate whether they are eligible for a discretionary bursary.
- 3.3. The academy will ensure that, in any marketing materials and the application form, procedures for how the institution maintains confidentiality are outlined to encourage more students to apply for the bursary.

4. Eligibility

- 4.1. Students who are aged 16 or over and under 19 years old on 31 August before the academic year in question may qualify for bursaries for that academic year.
- 4.2. 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.
- 4.3. The academy will only pay bursaries to students aged 16 or over, unless in exceptional circumstances, e.g. where a student is following an accelerated study programme. The academy will use its discretion to decide whether a student under the age of 16 is eligible – this is explained further in [section 6](#).
- 4.4. Students can apply more than once if their circumstances change. In this case, they will be reassessed, including a one-to-one interview to determine if there are any exceptional circumstances to consider.

5. Discretionary bursaries

- 5.1. The academy will ensure that discretionary funding is allocated to the students who are most in need of financial support.
- 5.2. The academy's eligibility criteria for receiving a discretionary bursary will include:
 - Students living in a low-income household – household income below average regional salary.
 - Students who are from a single parent family or have one or more dependent siblings in their family.
 - Students who have additional responsibilities, such as being a young carer or parent.
- 5.3. Discretionary bursaries may be awarded for students in low-income households. The academy will use household income, in some way, to help establish the amount of support awarded to a student, if possible.
- 5.4. Students who apply will be assessed individually. This assessment will be documented and evidence to support the claims will be obtained and retained for auditing purposes.
- 5.5. The assessment will be based on a student's financial needs and the academy will consider any unearned income, such as shares or investments, savings, and rental income.
- 5.6. The academy will not make blanket or flat rate payments to students without considering the actual needs of each student.
- 5.7. The academy will use in-kind payments over cash payments for discretionary bursaries wherever possible.
- 5.8. The academy will manage the discretionary bursary to keep payments within budget.

6. Vulnerable bursaries

- 6.1. The academy's eligibility criteria for receiving a vulnerable bursary will include students who are:
 - LAC.
 - Previously LAC (PLAC).
 - 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.

- 6.2. Via the application form, the academy will remind parents that they will not be able to continue to claim Child Benefit if the student successfully applies for ESA.
- 6.3. Students who are in one or more of these categories can apply for a vulnerable bursary of up to £1,200.
- 6.4. Where a vulnerable student is on a course lasting 30 weeks or more and is participating full-time, they will be eligible to receive £1,200.
- 6.5. The academy may pay a student in a vulnerable group more than £1,200 if it believes the student needs extra help to remain in education. Where a vulnerable student is on a part-time course, the academy can make a reduction based on an hourly or daily rate.
- 6.6. The academy will only pay students the amount they need to access education, based on individual assessment. Students will not automatically receive £1,200 if they do not need the full amount.
- 6.7. Proof will be needed to evidence that a student is eligible for the bursary, for example:
- **LAC or PLAC:** written confirmation, such as a letter or an email, of current or previous LAC status from the relevant LA (the LA that looks after them or provides their leaving care services)
 - **In receipt of Income Support:** a copy of the Income Support award notice, which must evidence that the student is entitled to the benefit in their own right, and confirm that the student can be in FE or training
 - **In receipt of Universal Credit:** copies of the Universal Credit Award notice from the last three months, which must evidence that the student is entitled to the benefit in their own right, as well as additional documentation to confirm their independent status, e.g. a tenancy agreement in the student's name, a child benefit receipt, children's birth certificate, or utility bills
 - **In receipt of Universal Credit or ESA and Disability Living Allowance or Personal Independence Payments:** a copy of the Universal Credit or ESA award from the Department for Work and Pensions (DWP), as well as evidence of receipt of Disability Living Allowance or Personal Independence Payment.
- 6.8. The academy will only submit a funding claim to the SBSS once sufficient evidence has been provided and the academy has confirmed that the student needs financial support to participate.
- 6.9. The institution will be responsible for assessing whether students are eligible to receive a vulnerable bursary.
- 6.10. The institution may decide that, although a student may be eligible for a bursary, as they fall within one or more of the vulnerable groups, the bursary is not required as they do not have any financial need and do not need further support. If financial needs are already met and there are no other costs or they do not require the maximum award, the institution may decide not to allocate a bursary to the student – for example, where:
- A student is in LA care and education costs are covered in full by the LA.
 - A student is financially supported by their partner.
- 6.11. Where the academy decides that a student is ineligible for funding in accordance with [7.10](#), the reasons for this will be explained to the student and/or the student's parents during a face-to-face meeting, followed by written confirmation.
- 6.12. If a student or the student's parents still want to claim a bursary for vulnerable groups, they must inform the academy. The academy will then consider the particular circumstances in each case and 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.
- 6.13. The academy will ensure its bursary application form is clear about the possibility of no or a reduced award.

7. Paying bursary funding to eligible students

- 7.1. The academy will aim to pay all funding in-kind, using cash payments only where necessary.
- 7.2. Payment in-kind may include, for example, travel passes, vouchers or credits for meals, or required books or equipment.
- 7.3. Where in-kind payments are given to students within vulnerable groups, the academy will explain the value of these payments to the student and how these have been deducted from the total £1,200.
- 7.4. Where payments are made to students, rather than in-kind, the funding will be paid by BACS transfer to the student's own bank account.
- 7.5. Payments will not be paid into another person's bank account unless exceptional circumstances mean that a student is unable to administer their own account. If a student cannot manage their own funds, the academy will consider who can manage the bursary on the student's behalf.
- 7.6. The academy has the right to determine how often payments are made – when doing so, the following will be considered:
 - The reason the bursary was awarded
 - The student's circumstances
 - Local arrangements
- 7.7. The academy has the right to insist that students only spend bursary payments on the support that has been identified as necessary to help them access education, e.g. to pay for travel costs.
- 7.8. The academy will adhere to good practice guidelines to make regular payments to students on a weekly basis.
- 7.9. The academy will not pay bursaries to students in large or lump sums.
- 7.10. In order to decide how best to use individual students' bursary funding, the academy will employ the following procedures:
 - Priority areas are addressed first, including travel to the academy, equipment costs and support with studies
 - Students are allocated a higher amount of funding at the beginning of their course to address the priority areas.
- 7.11. If students or their parents have any queries about payments, they should contact Mrs Curry at curryc@stjosephs.uk.net or contact 0191 4282700.
- 7.12. The academy may use up to five percent of its allocation from the ESFA for administrative costs.

8. Conditions for receiving bursary funding

- 8.1. Receipt of a vulnerable or discretionary bursary will be conditional on the student meeting the agreed standards set by the institution.
- 8.2. The conditions of payment will be clear and accessible to students, as well as being thoroughly explained as part of the induction process.
- 8.3. Evidence that the student has seen and agreed to the conditions will be kept for audit, such as an agreement signed by the student.
- 8.4. Students in receipt of bursaries must have 95% attendance at timetabled lessons, unless the absence is authorised.
- 8.5. Students in receipt of bursaries will be expected to abide by the Attendance Policy and Behaviour Policy of the academy.

- 8.6. Where there are concerns regarding a student's attendance or behaviour, the academy will discuss the issue with the student and consider individual exceptional circumstances before withholding any payments.
- 8.7. The academy will ensure that all parents and students are aware of the possible impact that attendance may have on payments, outlined in the application form.
- 8.8. The academy may stop payments where a student has been absent for a period of four consecutive weeks or more, excluding holidays or if there is evidence that the student intends to return.
- 8.9. The academy will stop payments where a student withdraws themselves from a study programme.
- 8.10. Money may be taken back from students if it has not been spent for the reasons it was awarded to them. Before doing so, the academy will always consider the impact of this on the student.
- 8.11. The academy may specify that students return any books and equipment purchased for them through the bursary, 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 for the bursary.
- 8.12. The academy will highlight to students and parents the impact of receipt of the 16-19 Bursary Fund on other benefits. This includes information that:
 - Receipt of bursary funding will not impact the receipt of other means-tested benefits paid to families, e.g. Income Support.
 - Receipt of Disability Living Allowance or Employment Support Allowance will mean parents can no longer receive certain benefits for that child, e.g. Child Benefit.

9. Recycling bursaries

- 9.1. The academy will be able to recycle unused funding for bursaries for vulnerable groups, e.g. if a student leaves early after only receiving part of their bursary (until 30 April 2022).
- 9.2. Where the academy has accrued funds, it will use these funds for another student, rather than claiming for the full £1,200, e.g. if a student left and £700 was unspent, the academy will only claim £500 towards another eligible student.
- 9.3. If the academy 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.
- 9.4. If the academy decides that a student is in one or more of the defined vulnerable groups, but does not have any actual financial need, it will submit a funding claim showing a zero amount.
- 9.5. The academy will be able to 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.
- 9.6. The academy can also carry forward any unspent funds to the next academic year – any carried funds will only be used to support students.
- 9.7. If the academy has no other students who are eligible for a bursary for vulnerable groups and funds have been claimed in error, it will contact the ESFA and arrange to return the funds.

10. Student declarations

- 10.1. Students and/or their parents 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.
- 10.2. By signing the declaration, the student and their parents are agreeing to all the conditions and eligibility criteria.

10.3. The academy will retain copies of the declaration and supporting documentation for six years – this includes:

For vulnerable groups:

- A copy of the funding claim sent to SBSS.
- Evidence showing that the student is eligible.
- Evidence of payments received from the SBSS, e.g. bank statements.
- A copy of the student's individual assessment of actual financial need.
- Evidence of payments made to the students.

For discretionary bursaries:

- Evidence used to assess eligibility.
- A copy of the student's individual assessment of actual financial need.
- Receipts for purchases made, e.g. bus pass, lunch receipts or book receipts.

11. Managing applications

11.1. The academy will use its own application form for the bursary fund.

11.2. All applications for the 16-19 bursary will be submitted by 30 September of each year wherever possible, to allow the academy to correctly and fairly assess overall demand and distribute discretionary awards. The academy will not, however, implement a cut-off date for applications, in recognition that some needs may arise throughout the academic year.

11.3. The date for applications to be submitted will be outlined in the bursary fund statement, the bursary application form and any marketing materials.

11.4. Application forms and marketing materials will outline that students who meet the criteria for bursaries for vulnerable groups are not automatically entitled to receive them, e.g. if they do not have any financial needs or these needs are covered by alternative means.

12. Quality assurance

12.1. The academy uses an [eligibility checklist](#) to confirm which documents have been provided for each student – these relate to the following:

- The application process
- The decision to award the specified amount of bursary
- The funds that have been issued to the student

12.2. The academy maintains written records of the following:

- The number of applications received
- The value of all bursaries awarded
- The purpose of all bursaries awarded
- Which applications qualified for the bursary and which did not
- Brief descriptions of the institution's justification for any decision to award a bursary or not

12.3. The academy retains copies of any documents the student has signed to give formal agreement to their conditions for payment, as well as any others mentioned in this section, for six years.

13. Fraud

13.1. The academy will be responsible for investigating any suspected instances of fraud relating to bursary fund applications.

- 13.2. If evidence comes to light that supplied information is misleading or fraudulent, the academy will stop any further payments and will attempt to recover any payments already provided to the student.
- 13.3. Where significant fraud is identified, the academy will report this to the ESFA. Significant fraud 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
- 13.4. The matter may also be referred to the police, with the possibility of the student and/or their parents facing prosecution.

14. Conditions for using the bursary

- 14.1. The bursary fund will not be used by the academy for any reasons which would give them a competitive advantage over other settings, such as:
- Block subsidy of the canteen.
 - Block subsidy of transport.
 - Block provision of equipment, material or books.
 - Bonus payments to reward attendance or achievement.
- 14.2. Block payments to students for attendance, irrespective of their actual financial need, will not be paid.
- 14.3. 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.

15. Complaints and appeals

- 15.1. All complaints and appeals must be made in writing in accordance with the Complaints Policy.
- 15.2. If the complaint or appeal concerns operational processes or customer service for a vulnerable bursary funding claim, the SBSS will deal with the case. If the case is not resolved following this, it will be passed to ESFA.
- 15.3. The academy will act as a first point of contact for students who have complaints and will support students as much as possible throughout the complaints procedure.
- 15.4. Complaints made regarding the academy and the academy's provision of support will be dealt with in accordance with the procedure set out in the Complaints Policy.

16. Monitoring and review

- 16.1. This policy will be reviewed annually by the Board of Directors and then the Local Governing Committee of each academy. The next scheduled review date is January 2023.
- 16.2. The academy will ensure that this policy is implemented correctly and appropriately at all times.
- 16.3. The academy will communicate any changes to this policy to all staff and relevant stakeholders.