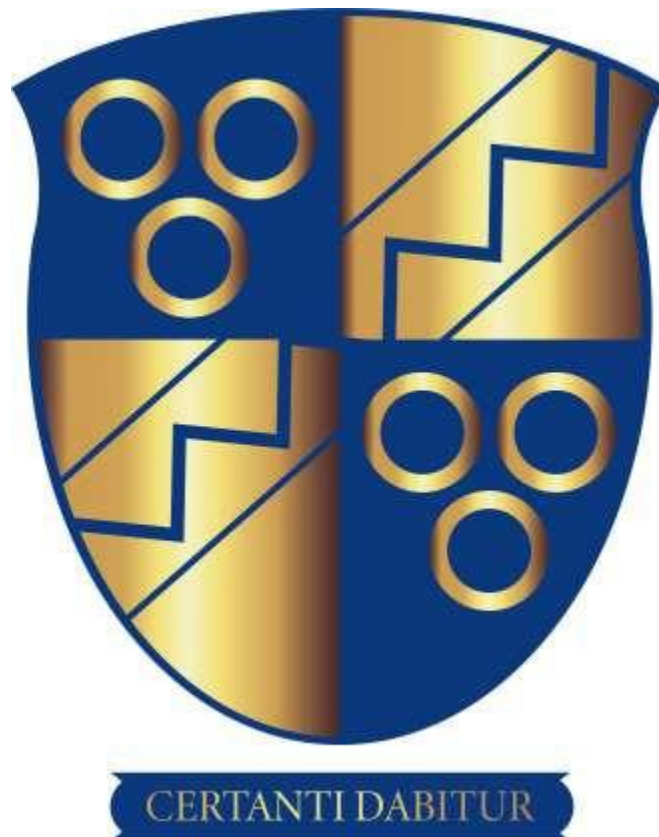


# Bursary Policy for 16-19 year olds (2023/24)

The Oldershaw School



Approved by:	Trust Board	Date: 13 June 2023
Policy Owner:	Head of Sixth Form	
Last reviewed:	June 2023	Next Review due: June2024

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## 1. Introduction

The 16-19 Bursary Fund is a scheme set up by the government to help the most vulnerable young people aged 16-19 continue in full time education. Its purpose is to provide financial support to help students overcome specific barriers to participation, so that they can remain in education. Full details can be found on the gov.uk website.

## 2. Legislation

This document meets the requirements under the following legislation:

- [The Equality Act 2010](#), which introduced the public sector equality duty and protects people from discrimination

This document is also based on guidance from Gov.uk and also complies with our funding agreement and articles of association.

## 3. Categories of bursary

There are two types of 16-19 bursary

### 3.1 Vulnerable Student Bursary

This is a guaranteed bursary of up to £1200 per year for young people in one of the defined vulnerable groups.

### 3.2 Discretionary Bursary

This is awarded at the discretion of The Oldershaw School based on individual needs to cover specific costs such as transport, books or equipment, and other course costs. Any books or equipment purchased from bursary funds should be returned to the School once study has been completed.

The Oldershaw School offers two levels of financial support based on household income and participation costs. The thresholds for determining eligibility to claim are detailed in the eligibility section below.

## 4. Eligibility

The basic eligibility requirements of the scheme which are applicable to both vulnerable and discretionary bursaries are

**4.1 Age** - students must be over 16 and under 19 at 31 August before the academic year in question. If a student turns 19 during their programme of study they can continue to receive the bursary to the end of the academic year in which they turn 19, or to 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 on a study programme they began aged 16 to 18 or have an Education, Health and Care Plan (EHCP), they are not eligible for bursaries for vulnerable groups.

**4.2 Residency** – students must meet the residency criteria in the ESFA funding regulations for post 16 provision. This document sets out the evidence required to confirm eligibility and can be found at

<https://www.gov.uk/government/publications/advice-funding-regulations-for-post-16-provision>

The young person must then also meet the eligibility criteria for the category of bursary they are applying for:

### Vulnerable Student Bursary

**4.3** Students must fall into one of the categories below to be eligible for a vulnerable student bursary

- In care
- 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

The allocation of these funds is subject to audit so the School will require evidence that the application is genuine. All information will be treated in confidence (copies of the application and evidence will be retained for a period of 6 years).

Appropriate evidence includes:

- 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 – this is the local authority that looks after them or provides their leaving care services. The evidence could be a letter or an email but must be clearly from the local authority
- for students in receipt of UC or IS, a copy of their UC or IS 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 UC, you must also see a document such as a tenancy agreement in the student's name, a child benefit receipt, children's birth certificates, utility bills and so on
- for students receiving UC/ESA and DLA and PIP, a copy of their UC claim from DWP. Evidence of receipt of DLA or PIP must also be provided

Please note – students who meet the criteria for bursaries for vulnerable groups are not automatically entitled to a bursary if they do not have financial needs and/or relevant costs.

### **Discretionary Student Bursary**

Where a student does not meet the vulnerable student criteria, he or she may still be eligible for some support from the Discretionary Fund. The Oldershaw School has set two tiers of support based on household income.

**Tier A** – Students entitled to free school meals whose household income is less than £17,000.

- To confirm that students are eligible for this tier of bursary please complete online form at <https://www.cloudforedu.org.uk/ofsm/sims>
- To apply for this tier of bursary students should complete a Bursary Application Form available at [Bursary - The Oldershaw School](#)
- The Oldershaw School will be notified of applicants (successful and unsuccessful)
- Assessment of eligibility will then take place and decision documented on the 23/24 bursary database
- Decision letter will be sent to student

**Tier B** – where there is a surplus of funds after the allocation to students in Tier A, students whose household income is less than £25,000, may apply for a lower level of support. The following evidence will be required for students in this group:

- A copy of entitlement to means-tested state benefit, P60, Universal Credit Award Notice or Tax Credit Award Notice confirming household income of less than £25,000
- Evidence of total household income (including earned and unearned) of less than £25,000

To apply for this tier of bursary students should complete a Bursary Application Form available at

[Bursary - The Oldershaw School](#)

## **5. Allocation of funds**

### **Vulnerable Student Bursary**

The funding for the vulnerable student bursaries is held centrally by the CLA Coordinator. Whenever a new student meeting the criteria is identified The Oldershaw School must draw the funding down by completing and submitting a claim form via the SBSS online portal.

<https://studentbursarysupport.education.gov.uk>

## Discretionary Student Bursary

- 5% of the fund will be held back for administration.
- 10% of the fund will be held back for applicants who join later on in the year or whose personal circumstances change. This contingency fund will be used for students with changed financial circumstances during the year or for those on bursaries in all categories who can evidence a need for emergency funding. All requests will be handled in strictest confidence.

Students applying under Tier A will be assessed individually based on transport needs and number of dependent children living in the household and awarded a bursary based on their actual financial need including participation costs, up to a cap of £1200 per annum. If there is still money in the fund after the allocation of funds to Tier A, those applying under Tier B will be assessed individually based on transport costs and number of dependent children living in the household and awarded a bursary based on their actual financial need including participation costs up to a maximum of £600 per annum.

The Discretionary Student Bursary will be allocated in the following ways:

- 60% will be paid in the form of a payment into the student's bank account on a fortnightly basis
- 40% will be paid 'in-kind' and be reimbursed on production of receipts for travel etc, where approval has been given in advance through the completion of the DSB Request Form. (Please note that if the request relates to the purchase of equipment or books the student will be required to sign an agreement confirming that the items will be returned to the School after use). Students can request that their 'in-kind' payment covers the cost of their university/ career requirements i.e. visits and interviews which will be refunded on production of receipts. In emergency circumstances and for a short time only students can claim in-kind bursary for food, evidenced by production of receipts.

## 6. Conditions for receipt of student bursary

Allocation of funds will be reviewed termly and students in receipt of funds will have a review with pastoral staff each term (re: their attendance, timekeeping and general conduct). In order for payments to be authorised students must sign and be compliant with the **16-19 Bursary Scheme Code of Conduct**.

Payments will be transferred fortnightly to the student's bank account upon authorisation that the student has satisfied these requirements. These payments will be made in arrears and in some cases there may be delays if there is a query regarding attendance. If a payment is not made, it is the responsibility of the student to monitor this and seek advice from the Sixth Form Staff.

Students will be required to inform the School of any changes in their financial circumstances which may affect their eligibility for bursary funding.

## 7. Applications

Discretionary Tier A please use the online assessment tool here: <https://www.cloudforedu.org.uk/ofsm/sims>

Application forms and are available to download from our website or they can be collected from Reception on GCSE results day. In September they will also be available from the Head of Sixth Form

Discretionary Tier B - Application forms and are available to download from our website or they can be collected from Reception on GCSE results day. In September they will also be available from the Head of Sixth Form. Completed forms should be returned to the Head of Sixth Form by the end of September together with any evidence to support the application.

We will continue to consider all applications throughout the year, for those students who may have a change to their circumstances. Funding is not guaranteed by receipt of an application form. Each application will be considered on a case by case basis if eligibility criteria have been met and will be subject to the availability of funds.

## **8. Assessment of application**

The Head of Sixth Form and or Bursary Awards Panel will assess each application with supporting evidence in the strictest confidence. Reassessment is no longer required each year but at the start of Y13 a self-declaration form is obtained from the student to confirm that their household circumstances have not changed.

## **9. Appeals**

Parents, Carers and Students have the right of appeal to the Bursary Awards Panel if it is felt that their application was declined without justification.

## **10. Monitoring arrangements**

This policy will be reviewed by the Executive Headteacher and approved by the Trust Board, annually.

## **11. Links with other policies**

This document links to the following policies:

- Equality information and objectives
- Complaints

## **12. Appendices**

- Bursary Application Form
- Self-declaration form
- Discretionary Student Bursary Request Form
- Bursary Scheme Code of Conduct



## Appendices

### The Oldershaw School 16-19 year old Bursary Fund Application –

Please read the 16-19 Bursary Fund Policy before completing this form

#### 1. Student Details

<b>Surname</b>	
<b>Forenames</b>	
<b>Address</b>	
<b>Postcode</b>	
<b>Date of Birth</b>	
<b>Student email</b>	

#### 2. Household Details

<i>Please state who you live with and their relationship to you e.g. Mother, Father, Brother, Sister, Partner etc</i>		
<b>Name</b>	<b>Relationship</b>	<b>Age if under 16</b>

3. **Level Required** – Please tick which level of payment you are applying for:

<b>Vulnerable Student Bursary up to £1200</b>	
I am a young person in care	
I am a young care leaver	
I am in receipt of <b>both</b> Personal Independence Payments (Disability Living Allowance) <b>and</b> Employment support Allowance (ESA) (or Universal Credit as a replacement to ESA)	

4.

<b>Discretionary Student Bursary Tier A – please complete online assessment here:</b> <a href="https://www.cloudforedu.org.uk/ofsm/sims">https://www.cloudforedu.org.uk/ofsm/sims</a>	
<b>Now complete Sections 6 and 7</b>	
My total household income is less than £17000.00	
I am a student aged 19 or over with an Education, Health and Care Plan (EHCP) and meet one of the above criteria	

5.

<b>Discretionary Student Bursary Tier B. Now complete sections 6 and 7.</b>	
My total household income is more than £17000.00 but less than £25,000.00	
I am a student aged 19 or over with an Education, Health and Care Plan (EHCP) and meet one of the above criteria	

## 6. Household Income

Please include the required supporting documentation with this form. All evidence will be photocopied and dealt with in the strictest of confidence. (Please do not send any original documentation in the post), Students should take it directly to the Head of Sixth form who will arrange have the documentation copied and returned to you as soon as possible.

<b>Total household income is:</b>	<b>£</b>

Please indicate which of the following benefits/income you are currently in receipt of. Please provide the necessary evidence.

Type of Income	Yes/No	Evidence required
Evidence of living in care or being a young care leaver		Written confirmation of your looked after status via letter or email from the relevant local authority
Universal Credit/Income Support		An award letter which is less than 3 months old on the date of the application
Working Tax Credit / Child		Pages 1-4 of your most recent tax credit award letter



Tax Credit		
Income-based Employment and Support Allowance (ESA)		An award letter which is less than 3 months old on the date of the application
Personal Independence Payment (Disability Living Allowance)		An award letter which is less than 3 months old on the date of the application
Other Benefits/Pensions (specify)		An award letter which is less than 3 months old on the date of the application
Earned income with no additional benefits		The last 3 months wages slips or last 6 weekly wage slips or 4 fortnightly wage slips
Self-employed earnings with no additional benefits		Latest audited accounts or official tax return
Evidence of Free School Meals		Award letter
P60		Previous tax year

## 7. Participation Costs

Help required:	Amount per week:
Travel costs (bus/train ticket required to support application)	
Course costs (books, trips, equipment, clothing, materials, resources)	
Meal costs (in exceptional circumstances)	
University/career requirements	
Other (please specify)	

## 8. Bank Account Details

Where bursary payments are made to a bank account, they should only be made to the student's bank account.

### Student Bank or Building Society details

<b>Full name of the account holder</b> (This will appear on your cash/debit card or statement)	
<b>Name of Bank or Building Society</b>	
<b>Branch</b>	
<b>Sort code</b>	
<b>Account Number</b> (This may not be the same number as on your cash/debit card. Most are 8 digits long. If you are unsure seek advice from your Bank or Building Society)	

We confirm that the details provided to support this application for the 16-19 bursary are true and accurate. We understand that the above-named student must comply with the terms of the Oldershaw Academy Bursary Scheme Code of Conduct and that giving false or incomplete information that leads to incorrect/overpayment may result in future payments being stopped and any incorrectly paid funds being recovered.

We understand that we must notify Head of Sixth form immediately if there are any changes in financial circumstances to ensure that funding is paid at the correct level.

Signed (student) ..... Date .....

Signed (parent) ..... Date .....

<b>For office use only</b>			
<b>Date of receipt</b>		<b>Supporting documents copied returned</b>	
<b>Date of review</b>		<b>Level of bursary approved</b>	<b>£</b>
<b>Approval/Decline Justification</b>			
<b>Name of reviewer</b>			

# The Oldershaw School

## 16-19 year old Bursary Fund Application – Year 13 Self-Declaration Form

Please read the 16-19 Bursary Fund Policy before completing this form

For 2023-24 any student who was judged eligible for a 16-19 year old Bursary in Year 12 will be eligible in Year 13 providing their household circumstances remain unchanged.

### Student Details

<b>Surname</b>	
<b>Forenames</b>	
<b>Address</b>	
<b>Postcode</b>	
<b>Date of Birth</b>	
<b>Student email</b>	

### Bank Account Details

Where bursary payments are made to a bank account, they should only be made to the student's bank account.

<b>Full name of the account holder</b> (This will appear on your cash/debit card or statement)	
<b>Name of Bank or Building Society</b>	
<b>Branch</b>	
<b>Sort code</b>	
<b>Account Number</b> (This may not be the same number as on your cash/debit card. Most are 8 digits long. If you are unsure seek advice from your Bank or Building Society)	

We confirm that the details previously provided to support this application for the 16-19 bursary remain true and accurate. We understand that the above-named student must comply with the terms of the Oldershaw School Bursary Scheme Code of Conduct and that giving false or incomplete information that leads to incorrect/overpayment may result in future payments being stopped and any incorrectly paid funds being recovered.

We understand that we must notify Head of Sixth form immediately if there are any changes in financial circumstances to ensure that funding is paid at the correct level.

Signed (student) .....

Date .....

Signed (parent) .....

Date .....

For office use only			
Date of receipt		Supporting documents copied returned	N/A
Date of review		Level of bursary approved	£
Approval/Decline Justification			
Name of reviewer			

# The Oldershaw School

## Discretionary Student Bursary Request Form

Please read the 16-19 Bursary Fund Policy before completing this form

### Student Details

<b>Surname</b>			
<b>Forenames</b>			
<b>Address</b>			
<b>Postcode</b>			
<b>Date of Birth</b>			
<b>What is funding for:</b>	<b>Amount</b>	<b>Receipt/application attached</b>	
School clothing			
Transport			
Meal in school			
Books & equipment			
Educational trips/university visits			

This form should be returned to the Head of Sixth Form alongside an application for a trip/visit or with a receipt for an appropriate purchase. Alternatively provide copy of details for a particular purchase (this will then be ordered for you through the Academy). Any equipment purchased must be returned to the Academy following completion of your study. **Payments cannot be made without receipts.**

<b>Limiting factors:</b>	<b>Attendance</b>	<b>Conduct</b>	<b>Dress code</b>
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Eligibility Criteria Met Y/N Date .....

Student Signature: ..... Head of Sixth Form: .....



## The Oldershaw School 16-19 Bursary Scheme Code of Conduct

### Attendance:

There is a requirement for 100% attendance every week during term time. Less than full attendance at all sessions may mean that no 16-19 Bursary payment is made. However, there may be times when you cannot reasonably attend a session and, as a result, are marked as being absent on the register. Reasons for acceptable absences are listed below. Absences that may be accepted by the School are called 'authorised absences'.

For an authorised absence to be recorded on the register your parent/carer must communicate the reason for absence in writing to your Form Teacher. For example, if you have a doctor, dentist or hospital appointment, all letters should be provided by your parent/carer, or, we can take a copy of an appointment card. The School is not obliged to accept repeated absences as genuine. Please remember that all 16-19 Bursary payments are at the discretion of the School.

If you are going to be absent because of sickness, transport problems etc. the School should be telephoned on 0151 638 2800 and a message left. You should ensure that the School is telephoned on the first and every subsequent day of your absence. You should also bring a letter from your parent/carer explaining your absence when you return to school.

Alternatively, please notify Mr Routledge by email: [routledge@oldershaw.wirral.sch.uk](mailto:routledge@oldershaw.wirral.sch.uk)

Any personal holiday during term time will be counted as unauthorised and result in non-payment of the 16-19 bursary.

### Authorised Absences

The following reasons will not normally stop payment of 16-19 Bursary:

- Sickness – if a letter from your parent/carer explaining the absence is supplied to the School
- Work experience, careers advice or university visits – these must be pre-planned, evidenced and agreed
- Medical emergencies
- Religious reasons
- Discretionary reasons agreed by Mr Routledge

### Unauthorised Absences

The following are examples of reasons for absence that will not be accepted as authorised absences:

- Babysitting children
- Holidays
- Paid employment
- Leisure activities
- Birthdays or similar celebrations
- Shopping trips
- Driving lessons

### Conduct:

You are required to be an outstanding ambassador for the Oldershaw School at all times. You are expected to be a positive example to younger pupils in the School at all times.

Unacceptable behaviour may lead to non-payment of a 16-19 Bursary. Examples of bad behaviour specifically includes:

- Engaging in continual, low level disruptive behaviour within a learning situation
- Using unacceptable language
- Not engaging fully in the learning process
- Lateness for classes or registration

**Dress Code:**

You must dress according to the Sixth Form Dress Code at all times.

**I confirm that I have read and understood the above information about receiving my 16-19 Bursary payments and understand the reasons why my 16-19 Bursary may not be paid.**

Name of student .....

Student signature ..... Date .....

Parent/Carer Signature ..... Date .....

.....