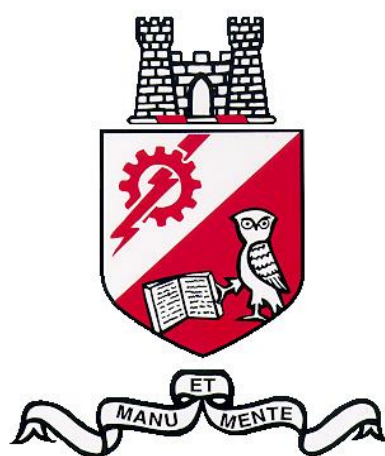


# WEST HATCH HIGH SCHOOL



THE BEST THAT I CAN BE

## 16-19 Bursary Fund Policy

Policy reviewed: September 2024

Signed:



Headteacher

Review Date:

September 2025

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## **1. Introduction**

### **1.1 What is the 16-19 Bursary Fund**

The fund is made available from the government through its funding body, the Education Funding Agency (EFA) for 16-18 year olds, to provide assistance to students whose access to, or completion of, education is inhibited by financial constraints or barriers. They may be typically used for:

- Transport
- Books and equipment – on production of receipts
- Hardship costs, e.g. uniform
- Additional course costs (e.g. trips and visits)
- Costs of travel to higher education venues
- Other discretionary areas

***The fund is a fixed and finite sum and allocations may therefore not exceed the total sum available.***

## **2. Policy Aims**

2.1 To ensure that the 16-19 Bursary Fund is administered in accordance with DfE/EFA guidelines and policies.

2.2 To explain the roles and responsibilities of staff and students.

2.3 To explain the procedure for making applications.

2.4 To explain the appeals procedure.

2.5 To ensure that the governing body receives appropriate reports on the administration of the 16-19 Bursary Fund.

2.6 To describe the eligibility criteria, how the bursary is calculated and payment processes.

2.7 To ensure that all applications are treated in the strictest confidence

## **3. Criteria and Eligibility for 16-19 Bursary Funds**

Details of the criteria to be used and the eligibility for payments are shown at Appendix 1.

## **4. Responsibilities**

### **4.1 Student**

- Students making applications undertake to provide accurate information and appropriate documentary evidence where needed.
- Students in receipt of an award should comply with school rules and regulations
- Students must inform the school of changes in their financial circumstances.

### **4.2 Sixth Form Support Officers**

- Assist the student to make an appropriate application
- Ensure the form is completed appropriately and that documentary evidence is provided or confirmed where required.
- Log application and pass completed applications to Finance dept at [finance@westhatch.net](mailto:finance@westhatch.net)

### **4.3 School 16-19 Bursary Fund Manager**

- Oversee the administration of the fund.
- Make decisions on applications with members of the Bursary Panel.
- Ensure that reasons for the panel's (see 4.4) decision are accurately recorded.
- Act as the first point of contact to receive any appeal.
- Ensure that audit requirements are met.
- Produce reports on administration of fund for governing body.
- Ensure timely payments.
- Ensure that fund is publicised in an appropriate manner.

#### 4.4 16-19 Bursary Fund Panel

- This will consist of the Bursary Fund Manager, Head of Sixth Form and Deputy Head of Sixth Form.
- The panel will consider each application and ensure that awards are granted fairly and equitably in accordance with the fund guidelines.

#### 4.5 The Appeals Panel

- The Appeals Panel will consist of the School Assistant Head for Sixth Form plus one other member of the Senior Leadership Team.
- The Appeals Panel will consider any appeals not resolved by the Bursary Fund Manager.

#### 4.6 Finance Team

- The Finance Manager will ensure funds are paid to students in accordance with the decisions of the panel.
- Notify the student at the termly review dates whether attendance and behaviour conditions are being met before making/with holding a payment (see Appendix 2).
- Administer the cash-flow in accordance with audit and EFA requirements.
- Liaise with the Bursary Fund Manager to ensure that audit requirements are met.

#### 4.8 Deputy Head of Sixth Form

- Ensure attendance is monitored and any issues are brought to the attention of the Heads of Year.

#### 4.7 Governing Body (Finance & Premises Committee)

- Receive an annual report from the Bursary Fund Manager detailing the take-up against the criteria used and a financial analysis of the expenditure.

### 5. Procedure

Students may obtain advice from the Bursary Fund Manager before completing the application form.

The Bursary Fund Manager organises a meeting of the Bursary Fund Panel. The panel will consider each claim and make a decision in accordance with the fund guidelines. A brief explanation of the decision will be recorded on the form.

The claim forms will be sent to the Bursary Fund Manager who will liaise with the panel to ensure that all the 'Commitment Conditions' have been met.

If all the conditions have been met the form will pass to the Finance Team who will send the appropriate payment to each student. In cases where payment is made to a third party (e.g. childcare) it will be the responsibility of the Finance Team to ensure that this occurs. The Finance team will retain these forms on file for 6 years.

### 6. Appeals Procedure

**Stage 1:** Any parents/carers or students who wish to appeal the decision by the Bursary Fund Panel should do so in writing to the Bursary Fund Manager within 4 weeks of the decision. Parents/carers or students should clearly explain what is being appealed and why they believe the decision to be incorrect. Additional evidence to support the appeal may be required. The claim will be reassessed and the parents/carers or student informed of the decision in writing within 10 days of receipt of the letter

**Stage 2:** Should the matter not be resolved to the satisfaction of the parents/carers or student, then they can ask for the appeal to be passed on to stage two. The Bursary Fund Manager will arrange a meeting of the Appeals Panel. The claim will be reassessed and the parents/carers or student informed of the decision in writing within 10 days of the Appeals Panel meeting. The decision of the Appeals Panel will be final.

## **7. Timing and Amount of Payments**

See Appendix 2

## **8. Review of policy**

The policy will be reviewed annually, in accordance with recommendations from the schools' audit services and EFA requirements by the Bursary Fund Manager.

## **9. Data and Confidentiality**

The school will treat all information supplied under this policy as confidential and in accordance with the school's data protection policy and records management policy.

West Hatch High School fully complies with information legislation. For full details on how we use your personal information please visit [www.westhatch.essex.sch.uk](http://www.westhatch.essex.sch.uk) or call 0208 504 8216 if you are unable to access the internet.

For audit purposes all information must be retained for a period of 6 years.

## **10. Audit**

The 16-19 Bursary fund is subject to audit so the school must retain all documentation relating to each claim, whether it was awarded or not and a brief justification. In particular documentation should include

- Application forms
- Evidence showing the student is eligible
- Evidence of payments received from SBSS (Vulnerable claims)
- Evidence of payments made to the students.
- Receipts for purchases made e.g. bus pass, book receipts.

All documentation must be kept for a period of 6 years.

## **11. Misuse and Fraud**

The school has a duty to investigate instances of suspected fraud when a student is applying for bursary funds.

Where evidence is found that misleading or fraudulent information has been knowingly submitted by a student or parent, resulting in the student receiving a bursary that they should not have received, the school will attempt to recover overpayment from the student.

The matter may also be referred to the police with the possibility of the student and/or their parent or carer facing prosecution.

## **12. Appendices**

1. Criteria and Eligibility for Payment
2. Bursary Fund Application Form (To be completed)
3. Timing and Amount of Payments

**Application forms are available from the Sixth Form, the Finance Office or you can download one from the West Hatch High School website.**

## Appendix 1 Eligibility Criteria

### Categories of Bursary

There are two types of 16-19 bursary

- **Vulnerable Student Bursary** This is a bursary of up to £1,200 per year for young people in one of the defined vulnerable groups.
- **Discretionary bursary** – this is awarded at the school's discretion based on individual needs to cover specific costs such as transport, books or equipment, trips and other course costs. The school offers two levels of financial support based on household income. The thresholds for determining eligibility to claim are detailed in the eligibility section below.

### Who is eligible to apply for 16-19 Bursary Funding?

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

- **Age** - students must be over 16 and under 19 at 31 August (pre Academic Year). 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.
- **Residency** – students must meet the residency criteria in the EFA funding regulations for post 16 provision Academic Year. 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>

### Vulnerable Student Bursary

Students who meet this criteria, and who have a financial need, can apply for a bursary for vulnerable groups. This bursary can pay up to £1,200 per year (with the actual amount dependant on the specific financial needs they have) to a student enrolling on a Full Time (EFA funded) course for 30 weeks or more (pro-rata if less) and should meet the criteria below:

- 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 rights as well as Employment and Support Allowance or Universal Credit in their own right

### What evidence will I need?

- For students in receipt of qualifying benefits, a letter from DWP which states the benefit the student is entitled to which should confirm that they can participate in further education or training. This must clearly state that the claim is in the student's name/confirm they are entitled to benefits in their own right.
- 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

Payments will only be made to students who are eligible in this category if financial need has been established. If the student has had their financial needs met by other funding streams or there are no relevant costs then the application may be refused or funding may be reduced if the full amount is not needed.

### **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 school will assess each case on an individual basis and any funding will be determined according to need.

### **Free School Meals Students**

Where students are currently in receipt of free school meals, the school will need to be satisfied that the application for bursary support is genuine following the standard procedures that are currently in operation for free school meal applications. Students currently retaining eligibility for free school meals under the Universal Credit Rollout Period rules will need to demonstrate **current** financial need in order to receive bursary funding.

*Students claiming in this category will not normally be eligible to claim bursary funding for meals as they will be entitled to receive a free school meal at school.*

### **What evidence will I need?**

- A copy of entitlement to means tested state benefit, Tax Credit Award Notice confirming household income of less than £16,385 or Universal Credit award notice.
- Universal Credit Statements (last 3 months) – if you apply on or after 1 April 2018 your household income must be less than £7,400 a year (after tax and not including any benefits you get)
- Evidence of total household income (including earned and unearned) of less than £16,385.

If you are not already eligible for free school meals for the Academic year, you will need to apply via our website.

### **Low Income Students:**

Students whose household income is more than £16,385 but less than £30,000, may apply for a lower level of support. The following evidence will be required for students in this group:

### **What evidence will I need?**

- A copy of entitlement to means – tested state benefit or Tax Credit Award Notice or Universal Credit statement (last 3 months) confirming household income of less than £30,000.
- Evidence of total household income (including earned and unearned) of less than £30,000. I.e. P60, 3-6 month worth of bank statements

*Please note that the total household income includes Universal Credit.*

The size of maximum payment depends upon the number of applicants and the level of residual funds remaining. **All items for support will be considered on a case by case basis and will be targeted at those students who most need financial assistance.**

Payments will be made as per **Appendix 2**

### **One-off payments:**

Eligible students that wish to access the Bursary Fund for financial support for one-off items such as additional equipment, transport, trips etc. should contact Bursary Fund Manager detailing their needs.

The overriding criteria is that the funds will be used as additional support for Bursary Students or to remove any financial stigma in regard to participation in events. Receipts for items of equipment etc. will also be required.

## **Allocation of Funds**

### **Vulnerable Student Bursary**

The funding for the vulnerable student bursaries is held centrally by the Student Bursary Support Service. Whenever a new student meeting the criteria is identified the school must draw the funding down by completing and submitting a claim form via the SBSS online portal.

**[studentbursary.education.gov.uk/w/webpage/1619bursary](http://studentbursary.education.gov.uk/w/webpage/1619bursary)**

### **Discretionary Bursary**

The school has been allocated a fixed sum of money from the EFA for the 16-19 Bursary Fund.

- 5% of the total fund will be retained by the school to contribute towards administrative costs
- 10% of the fund contingency will be held back in the first instance for applications during the course of the year (i.e. after the “Window 1” application deadline of 13th September of the academic year) or for those students whose circumstances have changed.
- Students applying under Level 1 will be assessed individually and awarded a bursary based on their actual financial need.
- If there are still residual funds remaining after the allocation of funds to Level 1, students applying under Level 2 will be assessed individually and awarded a bursary based on actual financial need.

**Bursary Students Final payment:** Bursary Students who receiving allocations in the academic year may receive a final payment in July which will be a contribution towards costs incurred as they continue in their education either at university or college. The value of this payment will be determined by the remaining funds after the final allocation has been made and will be paid as per the schedule in Appendix 2, after it has been confirmed that the students have completed all their examinations. It may be that in some years there will be no final allocation if all the funding has been used to support students' bursary payments during the year

### **Commitment Conditions**

To continue to receive a bursary a student must satisfy the following conditions:

1. The student must have no unauthorised and unexplained absence or lateness from lessons or from school unless they have prior permission from the Sixth Form Management Team. Holidays will not be authorised.
2. The student must sit all his/her examinations
3. The student must be up to date with all class and homework and have handed in all coursework by the deadline
4. The student must achieve satisfactory behaviour and attitude to learning and abide by the terms and conditions of the Sixth Form Code of Conduct.

Students' attendance will be reviewed termly at pre-set dates as set out in Appendix 2. In order for the following term's payment to be authorised, students must have zero unauthorised absences since the last review or since the start of the course (if term 1). Students have a fresh start after each review thus allowing a spring or summer term payment to be possible even if they did not qualify for autumn. This attendance review will take place centrally and students with unauthorised absences will be invited to discuss this with the Bursary Fund Manager within one week before the payment is suspended.

### **In Year Applications and the Contingency Fund**

Applications outside of “Window 1” (19th September of the academic year) will be from the Contingency Fund (10% of the total Bursary Fund allocated to the school). An estimate of the “residual funds” figure will be made by the Bursary Fund Panel. This means that level 3 payments may vary according to the “residual funds” available in Windows 1 and 2 and during the year. Applications outside of Window 1 will also be pro rata based on the student enrolment date and academic year.



**Exceptional cases and Contingency Fund**

A small proportion will be reserved from the contingency for exceptional cases at the discretion of the Bursary Fund Manager to respond to atypical need not identified through a formula approach.

## Appendix 2 Timing and Amount of Payments

1. Students are only eligible for payments if they are legitimately enrolled, and meet all the 'Commitment conditions'.
2. Applications for Academic Year Bursary Funds may be made in the time periods below:
  - **Window 1:** For payment by 3<sup>rd</sup> October (Academic Year) applications with evidence should be received by 19<sup>th</sup> September (Academic Year)
  - **Window 2\*:** Applications with evidence received after the Window 1 deadline but before 5<sup>th</sup> October will receive a response by 23<sup>rd</sup> October (Academic Year).
  - **In Year Applications\*:** Beyond Window 2 applications will receive a response within 10 working days of submission.

The final deadline for applications is 12th February (Academic Year).

\* All applications outside of Window 1 will also be pro rata based on the student enrolment date and academic year.

3. It is expected that at least 85% of the funds for the year will be allocated by November.
4. Payment Schedule:

Instalment payments will be made throughout the academic year on a termly basis.

### Important Notes

1. ALL requests for bursary support funding are considered on an individual basis and decided according to actual financial need – funding may be limited or refused if need is not established – this includes students in the Vulnerable category.
2. Funding may vary from student to student, depending on, for example, their household income, distance to travel and the requirements of their study programme.
3. Applications are treated in the strictest confidence
4. In certain cases, payments may not be made direct to the student or may only be made on production of a valid invoice or receipt.
5. Students should ensure they have a bank account in their name (evidence required) through which to receive funds. Cheques will not be issued and payments will not be made to parents/family members.
6. If a partial allocation is made, the payments will be related proportionately.
7. Payments are dependent on there being **no** unauthorised absences in any relevant period under review
8. Equipment purchased by the school for use by the student should be returned at the end of their studies

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## Appendix 3 Bursary Fund Application Form

### **16-19 Bursary Fund Application 2024-2025**

The 16-19 Bursary funds are paid by the Education Funding Agency (EFA) to schools and colleges so that they may provide financial help to students whose access to or completion of education might be inhibited by financial considerations. If you wish to apply for the fund please complete the form below and return it with any required evidence to the Finance Department by Monday 30th September 2024.

**We cannot process your application unless suitable evidence is provided  
ALL APPLICATIONS ARE TREATED IN THE STRICTEST CONFIDENCE**

#### Student Details

Surname/Family Name:	
First Names:	
Date of Birth	
Address	
Post Code	
e-mail address	
Contact Tel No.	

#### **Level 1 - Vulnerable Bursary**

Only complete if you are in one of the following groups (please tick). You **may** be entitled to £1200 per year for a full-time course. Funding is NOT guaranteed and there is a possibility of no award or limited award even if eligibility criteria is met. Need will be assessed on an individual basis.

Young person in care	
Care leaver	
Young person in receipt of Income Support or Universal Credit (you receive this, not your parent/carer)	
Disabled young person in receipt of 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	

#### **Level 2 - Students who are entitled to Free School Meals**

Students who have successfully claimed Free School Meals for the current academic year (2024/2025) or for the previous academic year before 1<sup>st</sup> April 2024

<b>Level 3 - Low Household Income</b>	
Students whose home Household income is less than £30,000 – <i>including Universal Credit</i>	

#### **Level 4-One off payments**

Students that fail to meet the criteria for a Level 1 – 3 Bursary Award and wish to access the Bursary Fund for financial support for equipment, transport etc. Details must be provided below for the Bursary Fund Manager to analyse their needs (please use a separate sheet if necessary).


Student's Bank or Building Society Details

To receive payments, you must have a bank account in your own name that will accept BACS payments. If you do not have a bank account, you need to open one before completing this form.	
Name of Account Holder	
Name of Bank	
Branch	
Sort Code	
Account Number	
Roll Number	

I confirm that the details are true and accurate.

Signature Student		Date	
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Parental/Carer Details

Surname/Family Name:			
First Names:			
Date of Birth			
Address			
	Post Code		
Home Phone			
Mobile Phone			
<p>Please state annual household income, and attach evidence. Please refer to our 16-19 Bursary Fund Policy for more information. Examples include:</p> <ul style="list-style-type: none"> <li>• Tax Credit Statement, or 3 x most recent Universal Credit Award Notices</li> <li>• Low income families – Working Tax Credit Statement or P60 + last 3 months bank statements showing household income earned</li> </ul> <p><b>NOTE: APPLICATIONS WILL NOT BE PROCESSED WITHOUT ANY SUPPORTING EVIDENCE – EVEN IF YOU ARE CURRENTLY RECEIVING FREE SCHOOL MEALS</b></p>			Annual Household Income:

I confirm that the details on this application are true and accurate.

Signature of Parent/Carer		Date	
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