



GREENWOOD ACADEMIES TRUST

Post-16 Bursary Procedure

Document Owner:	Central Finance & Education teams
Reviewed:	10 th July 2024

1. Overview

- 1.1 The 16 to 19 bursary is designed to support young people aged 16-19 to continue in education or training in sixth forms and academies. The fund is designed to remove barriers to participation. It is not designed to be a cash incentive to participate in education or training. It is intended that these funds should target those who are experiencing severe financial hardship. All beneficiaries of this fund will need to meet eligibility criteria and conditions as laid out by this procedure and the guidelines from the Department for Education. Failure to do so will result in bursaries not being awarded or withdrawn. As a point of principle bursary funds should not be used to displace other types of support available to young people e.g. childcare costs should not be covered that can be covered via Care to Learn or Transport costs that are met by the Local Authority.
- 1.2 Academies that are funded by the Education and Schools Funding Agency (ESFA) will receive a Bursary Fund Allocation for each academic year.
- 1.3 All academies must adhere to the 16-19 Bursary Fund Guidance provided by ESFA.
- 1.4 The allocation of vulnerable bursaries will be subject the academy receiving the appropriate level of funding from the ESFA.

2. Vulnerable bursaries for the most vulnerable learners

- 2.1 The academy will pay a vulnerable bursary of up to £1,200, assessed based on financial need, to learners in the following categories.
 - Those in care
 - Care leavers
 - Young People in receipt of Income Support or Universal Credit
 - Disabled young people who are in receipt of Employment Support Allowance who are also in receipt of Disability Living Allowance or Personal Independence Payments

The definition of a Care Leaver or 'former relevant child' according to the Children (Leaving Care) Act 2000 is:

'Any 18 – 21-year-old (or until the end of an agreed programme of education or training) who has been looked after for at least 13 weeks since the age of 14 and who is still looked after or recently left care.'

Therefore, any 16–19 year-old accessing learning at a post 16 organisation funded by the ESFA will be classed as a care leaver if they were in care for 13 weeks (not necessarily consecutively) or more since the age of 14.

- 2.2 If a learner becomes entitled during the year the payments will be pro-rata to the number of whole weeks remaining in the academic year.
- 2.3 Vulnerable bursaries will be pro rata for any courses that are less than 30 weeks.
- 2.4 If a learners' situation changes during the course of the year, then their eligibility can be re-assessed and the level of support offered may be increased or withdrawn completely. There is a responsibility on learners to notify the Academy to changes in their circumstances that might affect their continued eligibility for a bursary.

- 2.5 Young people can re-apply for a bursary if their circumstances change throughout the year or if they had a previous award withdrawn.
- 2.6 At the beginning of the academic year the academy will encourage young people to apply for vulnerable bursaries. Deadlines will be set for applications and a date will be published for panels to review applications, make decisions and communicate their decisions to young people. However, this will not preclude schools, providers and academies from considering applications beyond this date, but this will enable them to distribute the funds they have as fairly as possible, having assessed the overall demand for support. Schools, academies, and providers will hold back funds to support in year applications (where they have start dates outside of the academic year) and anticipated at risk discretionary bursaries.

3. Discretionary Bursaries

- 3.1 Discretionary bursaries will be awarded as a full or part contribution towards the cost of the following types of expenditure where young people are unable to meet those costs through any other means. Qualifying expenditure is defined as anything identified by the Academy as a barrier to participation. Examples of qualifying expenditure are as follows;

- Reasonable transport costs
- Meals at the academy
- Equipment and materials required in order to complete the course
- Uniform, where it is specifically required in order to access the post-16 provision,
- Other clothing where it is directly linked to the post-16 provision (for example Basketball Kit is required by specific students at Nottingham Academy).
- Educational visits or work-related activities that are a compulsory element of the programme of study.
- Other expenses approved by the Academy that are related to supporting attendance & participation.

- 3.2 In order to assess ability to meet the costs of expenditure, the academy will request information relating to all aspects of household income. Information supplied may be verified with relevant agencies such as Jobcentre Plus. Applicants may also be requested to provide information on other funding families might be receiving to support these activities e.g. LA support for transport or childcare support. Failure to supply requested evidence of income may invalidate the application.

- 3.3 Discretionary bursaries will only be awarded where the household income is assessed as being either;
- **Band 1** – Household income less than £16,190 per annum (or eligible for free school meals in the previous academic year)
 - **Band 2** – Household income between £25,000 and £30,000 per annum at the discretion of the Academy

- 3.4 The value of the award for a discretionary bursary will be determined by the academy based on its assessment of the need of the pupil.

4. At risk discretionary bursaries

- 4.1 Any young person can be considered for an at-risk discretionary bursary if it is deemed by the academy that they are at risk of dropping out. This type of bursary is intended to support any young person who having engaged in learning, begins to experience

financial difficulties that are severe enough to put them at risk of dropping out. Bursaries will be awarded subject to the availability of funding. The level of award will be dependent on need.

- 4.2 Academies will identify young people who are deemed to be “at risk”. They will do this in accordance with their normal processes and policies for providing welfare support and pastoral care.
- 4.3 At risk discretionary bursaries can only be awarded to young people if they were engaged in learning up until the census point in October or for at least one sixth of their intended programme if the course does not start at the beginning of the academic year.

At risk bursaries can be used to support the following young people;

- Those receiving the vulnerable bursary where they need additional support in the year because financial hardship leads to them being at risk of dropping out,
- Those receiving a discretionary bursary (band 1 or band 2) where they need additional support in the year because financial hardship has led to them being at risk of dropping out,
- Any other learner attending the Academy where they need additional support in the year because financial hardship leads to them being at risk of dropping out.

5. Application Process

- 5.1 All applications must be made to the academy on the forms provided.
- 5.2 The first and main closing date for applications will be announced each year but will be within the first half term of the academic year. Thereafter, applications will be considered on an ad hoc basis e.g. from those learners who enrol later, apply later or whose financial circumstances change.
- 5.3 Applicants will be required to provide evidence to verify their eligibility for the bursary. The applicant will need to provide relevant information to establish the household income. An exception to this will be those applying for vulnerable or discretionary bursaries band 1. Eligibility for band 1 can be met by verification that the applicant was in receipt of free school meals in the previous academic year.
- 5.4 Evidence of income will include any source of income e.g. employment, investment, benefits for both the applicant and the adults living with the applicants as well as any parents who live elsewhere. Any savings of the above parties may also be considered. This information will be self-declared but also evidenced by P60's, Tax Credit Awards and self-employment accounts and letters of confirmation of benefits from the Job Centre. Applicants will be required to give permission for this information to be verified before the Academy progresses the application.

6. Assessment

- 6.1 All applications will be assessed by a panel of staff [Bursary Panel] in accordance with this policy & ESFA guidance and then approved by the Head of Post-16 before applicants are notified of the decision. The Principal will have the final approval if there are any contentious areas of disagreement.
- 6.2 Documentary evidence to support applications will be checked and copies retained by the academy for audit purposes.

- 6.3 Applicants will be informed in writing of the outcome of their application within 14 days of receipt.
- 6.4 The panel will assess the eligibility of each application and make decisions on the level of award to be given. They will also decide the type of support to be offered (in kind or cash) and the frequency of the payments to be made. Payment arrangements can be reviewed where either requested by the applicant or if the academy feel it appropriate to do so in order to support continued participation in learning.

7. Payments

- 7.1 There will be a presumption that support will be provided in kind or payments will be made for specific goods or services (e.g. uniform or transport), direct to the supplier.
- 7.2 Cash payments or transfer of funds to a bank account may be taken into account as income by the Job Centre. Therefore, cash payments will only be made for those young people awarded vulnerable bursaries and where there is no other appropriate in-kind payment that can be made. It is recommended that young people seek individual advice from the special benefits advisor at the Job Centre before accepting any cash payments.
- 7.3 Payments will be made dependent on need i.e. weekly, fortnightly, monthly, half termly or termly.
- 7.4 Where a young person has submitted an application for either the vulnerable or discretionary bursary they may be awarded provisional/emergency support pending the approval of that application. Provisional/emergency payments will only be made where absolutely necessary and where a preliminary review of the young person's applications indicates that they meet eligibility criteria for one of the 3 types of bursaries (vulnerable, discretionary or at risk discretionary). The payment of an interim/emergency payment does not indicate that an annual bursary will be awarded.
- 7.5 Interim/emergency payments are not subject to the clawback of cash unless the information on the application form has been falsified. However, if the emergency payments are in kind e.g. books equipment etc then this can be reclaimed by the academy should they wish to.
- 7.6 Interim/emergency payments will only be made weekly and should seek to cover short term costs only. Where a young person is awaiting the outcome of an application for benefits this normally takes a maximum of three weeks. It is envisaged that emergency payments would not normally continue beyond 4 weeks.
- 7.7 Any benefits in kind are the property of the academy. If they can be re-used for other learners' young people may be required to hand these back to the academy at the end of the course or programme of study. In particular it is a requirement that all IT equipment is returned to the academy at the end of the period of study.
- 7.8 All discretionary payments are subject to availability of funds, but the following principles would apply.

All eligible applicants for Band 1 discretionary bursaries will receive a bursary to cover the costs of any qualifying expenditure deemed to be necessary for them to participate in their course or programme e.g. materials, equipment, educational visits. This will also include full support towards meals at the Academy.

All eligible applicants for band 2 discretionary awards will be asked to contribute towards the qualifying expenditure related to that young person and any bursary awarded will be a contribution towards the costs of participation. The level of award and level of contribution from the applicant will be subject to both need and the availability of discretionary funds. The availability of discretionary funds and the demand placed upon those funds will vary between Academies.

8. Participation

- 8.1 Payment of bursaries will be conditional upon a range of factors. This will include regular attendance, satisfactory behaviour and completion of coursework. The detailed arrangements will vary across Academies. What is deemed to be satisfactory behaviour and what is expected in terms of coursework completion will be driven by the policies and requirements of individual Academies.
- 8.2 All young people will be expected to maintain a minimum level of attendance (as defined by the policies and practices of the Academy) and throughout the year in order to continue to be eligible for bursary support. Attendance will be monitored regularly but at least half termly. Authorised absence will be classified as attendance. If a student only attends for part weeks with no explained reason this will result in part payment of the vulnerable bursary and part payment for any transport costs accrued.
- 8.3 If the conditions of payment are not met, then young people will receive a written warning. Continued non-compliance after the written warning will result in any outstanding bursary payments being withdrawn. Young people can re-apply for a bursary in the event of it being withdrawn. The Academy will want to see evidence of compliance of the conditions before approving another bursary.

9. Appeals

- 9.1 Applicants may appeal in writing against the decision of the Bursary Panel.
- 9.2 Appeals will be determined by the Principal who is not a member of the Bursary Panel.
- 9.3 If the decision of the Bursary Panel fails to resolve the issue then applicants should follow the Academy's normal complaints procedure.

10. Data Protection

- 10.1 All partners under this policy agree to share data and information in order to verify a young person's eligibility and to verify the position for any young people that move between providers during the year.
- 10.2 The information contained within the application will be treated as confidential and only shared where necessary to progress an application.
- 10.3 Hard copy information associated with applications, decisions and panels will be kept to satisfy ESFA audit expectations. The academy might also decide to keep information electronically.

11. Equal Opportunities

- 11.1 All aspects of the applications process and associated decisions will be managed with due regard to equal opportunities legislation.

Appendix 1 – Examples of Typical Spend & Claim Limits

The 16 to 19 Bursary Fund is intended to help students with essential costs of participating in their study programme.

The bursary fund is not intended to:

- Provide learning support – services that institutions give to students – for example, counselling, mentoring or extra tutoring.
- Support extra-curricular activities where these are not essential to the students' study programme.
- Support general household incomes.

The bursary can be spent on, but is not limited to, the following:

- Textbooks or other books or equipment related to your subjects and independent learning.
- Laptop – this would remain the property of the Academy and would need to be returned at the end of the course.
- Stationery/revision aids.
- Noise cancelling headphones.
- Printer.
- School trips and visits.
- Reasonable transport costs where required to travel to/from the academy
- Reasonable transport for university interviews.
- Exam fees
- Specialist Careers or Work Experience advice
- School lunch (where not already covered by free school meal)

The Post-16 team may determine that there are other items which qualify and are an appropriate use of the bursary funding and these should be approved by the Bursary Panel.

There are the two ways to spend the bursary:

1) Reimbursement Claim:

The student buys the item themselves and reclaim the funds from the school. Complete the online 'Student Bursary Claim Form' and attach proof of payment. The claim will be rejected if receipts are not attached. The Academy Finance team will process a payment into the student's bank account.

2) Advance Payment Claim:

The student can ask the school to order the item(s) for them and pay for it directly. Please complete the online 'Student Bursary Claim Form' ensuring that you provide the website link for each item, do not send screenshots. The order will be placed, and you will be contacted via your school email account when the item is available to collect. In exceptional circumstances only, if the order cannot be placed by Finance, an advance

payment may be made into the student's bank account instead and receipts will need to be sent to Finance as proof of purchase.

Limits on certain items

Please see the table below for examples of items that can be claimed from the bursary and the maximum amount permitted. These limits will be reviewed annually prior to the start of each academic year.

Description of items	Maximum claim value
Electronic equipment – IT Device / Digital Camera (if required for course)	No Max claim. Expense of item will be related to the purpose needed by the student.
Desk	£100
Desk Chair	£60 – Standard desk chair, gaming chair is not accepted
Printer	£100, including consumables
Noise cancelling Headphones	£100
Calculators for A level maths	£100
Books - A level/OCR/Revision guides Other materials (stationery, Art materials, etc)	No Max claim
Clothing & Footwear	£100 but only where a specific dress code is required
School Bag	£30
Reasonable Travel, where required	Cost of daily travel
School lunch	Up to the value of a 'meal' (main, dessert, drink)
Preparation for post year 13 (UCAS application fees, travel to venues)	No max claim
Nottingham Academy, Basketball programme: - Basketball branded kit - Basketball trainers - Wildcat Fees	Nottingham Academy, Basketball: - ONE full kit (top & bottoms) - £200 - No max claim

Appendix 2 – Process Steps & Roles/Responsibilities

	Process Step	Detail	Roles / Responsibilities	
			Post-16 Team	Finance Team
1	Parent / Student application – year 1 of study	Form submitted with details of request and evidence of eligibility	Review eligibility information and determine whether to accept. Review funding request and determine whether to accept	Finance involved in discussion with Post-16 team, where required
2	Parent / Student application – year 2 of study	Form submitted with self-declaration that eligibility criteria still met	Review form and confirm whether eligible	Finance involved in discussion with Post-16 team, where required
3	Allocation of Funding	Determine how much funding to allocate to each student	Decide funding allocation and confirm to Finance Team and to parent/student	Involved in discussion with Post-16 team
4	Items to be purchased by Academy	Identify which items to be purchased by the Academy	Post-16 team to raise purchase requisition in PSF, in line with standard purchasing process	Convert requisition to a purchase order and either send order to supplier or provide the order to the Post-16 team (depending on academy preference).
5	Items to be purchased by Parent/Student	Student purchases their own items, but only after approval from Post-16 team	Student completes the claim form and provides receipts, for Post-16 team to check & approve. Submit approved form to Finance Team	Process and pay the approved claim, paying directly into the Student bank account.
6	Advance Payment to the Student	In exceptional circumstances, the Academy provides advance payment	Student completes the request form for Post-16 team to review & approve. Submit approved form to Finance Team.	Process and pay the advance, paying directly into the Student bank account. Collect receipts from student in order to attach to the advance payment.