



Founded 1125

# Reading School

## 16-19 Bursary Fund Policy

### Responsibilities

**Policy Owner:** Cathy Woodcock,  
Finance Director  
**Governors Committee** Finance

### Audit Control

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# 16-19 Bursary Fund Policy

## Document Control and Approval

### Version Control

Version	Author	Summary of Changes	Reviewed By	Date
1.0	Cathy Woodcock	Policy created	A. Robson	01/12/2021

### Responsibilities

Job title	Responsible for;
Finance Director	Policy Owner
Finance Director	Policy Overview
Finance	Committee Responsible

### Policies Linked

Policy name	File location

### Forms Linked

Form name	Form location

### Staff that need to sign

Staff Group	Form location



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# 16-19 Bursary Fund Policy

## Introduction

This Policy is designed to promote fairness and consistency in the distribution of the [16-19 Bursary Fund](#). The 16 to 19 Bursary fund is a scheme set up by the Department for Education (DfE) and funded by the ESFA for 16-19 year olds to provide assistance to students whose access to, or completion of, education is inhibited by financial constraints or barriers.

There are two types of 16 to 19 bursaries:

- Vulnerable bursaries of up to £1,200 a year for young people in one of the defined vulnerable groups.
- Discretionary bursaries that institutions award to meet individual needs (discretionary bursaries are targeted on students who cannot stay in education without financial help for things like transport, meals, books and equipment)

## Eligibility

### General Eligibility

To be eligible to receive a Bursary a young person must be aged between 16 and 18 at 31/8/21 and meet the residency requirements as set out in the [16-19 Bursary Fund Guide 2021-22](#)

In addition to apply for a Reading School grant students must fall into one of the categories specified below:

#### **Category A: Vulnerable students – defined by the ESFA:**

- In care
- Care leaver
- Receiving Income Support (IS), or Universal Credit (UC) 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 (DLA) or Personal Independence Payments (PIP) in their own right as well as Employment and Support Allowance (ESA) or UC in their own right

Students in this category may receive up to £1,200 per annum for a study programme that lasts for 30 weeks or more if they need that amount of support. Students on study programmes of less than 30 weeks will be paid a pro-rata amount.

#### **Category B – Discretionary Awards**

- Targeted towards young people facing financial barriers in meeting essential costs e.g., transport, meals, books and equipment.



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Reading School has decided that learners facing financial barriers in meeting essential costs e.g., transport, meals, books and equipment may apply for a maximum grant of £500, where gross annual household income does not exceed £25,500 per annum. [Category B(i)].

Students that apply will be assessed individually and will be awarded a bursary fund based on their actual financial need.

Once claims have been met under Category B(i) Reading School will consider making additional discretionary awards initially of up to £300 per learner to young people where the student is eligible for free school meals and/or was eligible for Pupil Premium support in Year 11 – an assessment of financial disadvantage will be made. This award must be utilised to meet essential costs e.g., transport, meals, books and equipment. [Category B (ii)].

5% of the discretionary fund will be held back to cover administrative costs.

### Contingency Eligibility

Any young person meeting general eligibility requirements and facing financial hardship due to exceptional reason or circumstance change can apply to access the contingency funds on an individual basis by submitting an application in writing. Grants will only be considered if funds are available.

### Distribution of Remaining Funds

Once all the above claims have been evaluated and met remaining funds may be used at the discretion of the 6th Form Management Team to provide additional support for any student already in receipt of a mandatory or discretionary award. Payments may be made 'in kind' for example by provision of resources rather than cash.

### Conditions for Receipt

Students must complete an application form which constitutes a signed contract and states the standards expected of students and confirms the legitimacy of the entitlement. Payment of the bursary may be suspended if the standards are not met. Claims will be assessed by the 6th Form Management Team and payment will be made via the School Finance System.

### Supporting Evidence

Students in Category A must provide:

- Written confirmation from the Local Authority confirming the students current or previous looked after status;
- For students in receipt of Income Support or Universal Credit (UC), a copy of their Income support or UC award notice. This must clearly state that the claim is in their name/confirm they are entitled to the benefits in their own right and that



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they can be in further education or training. They must also provide additional documentation to confirm their independent status such as a tenancy agreement in the student's name, a child benefit receipt, children's birth certificates or utility bills;

- For students receiving UC/ESA, Disability Living Allowance (DLA) and Personal Independence Payments (PIP) – a copy of the students UC claim from DWP, evidence of receipt of DLA or PIP must also be provided.

Students in Category B (i) should provide documents from one of the following categories:

- **Universal Credit monthly award notice (or equivalent benefit statement)** – for three recent consecutive months, from which an assessment of annual income may be made
- **Three most recent wage slips** – for all adults in the young person's household
- **P60 End of Year Certificate(s)** for all adults in the young person's household who contribute to household costs for the year ended 5/4/21
- **Self-Assessment Tax Calculation (SA302)**, this is the equivalent of a P60 for self-employed people for the year ended 5/4/21
- **Three months most recent bank statements** – from which an assessment of annual income may be made.

Eligibility for students in Category B(ii) may be obtained from checking the Free School Meal system or Pupil Premium support in Year 11.

Where funds remain, students in either category A or B can put forward a case for one off payment to meet exceptional need, distribution is entirely at the discretion of the school and is dependent on the availability of funds. Students wishing to make such a claim should write a letter of application to Mr T Evans, enclosing supporting evidence where possible.

### Types of Award

The school may choose to pay Bursary payments "in kind" e.g. by purchasing text books, school meal vouchers, travel passes or equipment or may make payments directly into the student's bank account, in which case receipts will need to be provided. Payments will be made to a Bank Account in the name of the student. The student must have a valid account in their name unless there are exceptional reasons, which mean an appointee has been named to manage the affairs of the student.

#### Category A Students:

3 termly payments of up to £400 to be made in September (or on receipt of confirmation of eligibility), January and April.

#### Category B(i) Students:

Payments of up to £500 per academic year paid on submission of claim forms and receipts or invoices.



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## Category B(ii) Students:

Payments of up to £300 per academic year paid on submission of claim forms and receipts or invoices.

## Confidentiality

Applications and supporting evidence will remain confidential to the 6th Form Team and the School Finance Office (who retain documentation for audit purposes).



# Appendix



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## Bursary Fund Application Form

Student Name:	
Address:	
Postcode:	
Date of birth:	

Bursary applied for:

### Living Allowance

**Category A:** Please tick any boxes which apply.

- Student is personally in receipt of income support or Universal Credit
- Student is personally in receipt Personal Independence Payment (PIP) and Employment and Support Allowance (ESA) or Universal Credit and Disability Living Allowance
- Student is in care, was previously a looked after child or is a recent care leaver
- Student is in receipt of Disability Living Allowance and Employment and Support Allowance (ESA) or Universal Credit and Disability Living Allowance

Please provide evidence to support the statement ticked above.

### Category B: Discretionary Awards

This category is targeted for any students facing financial barriers in meeting essential costs e.g., transport, meals, books and equipment.

Please tick which award you are applying for.

- Category B(i): Initially maximum grant of £500, for students where gross annual household income does not exceed £25,500 per annum.
- Category B (ii): Initially maximum grant of £300, for students eligible for free school meals and/or previously eligible for Pupil Premium to make a claim.

Discretionary Bursary Awards are conditional upon:

- Prompt arrival for registration and all lessons.
- Lesson attendance above 95%.
- Maintaining good behaviour and attendance.
- All coursework, homework and assignments being completed to the best of ability and on time

For Category B (i) please tick the evidence provided:

- 3 most recent Universal Credit monthly award statements
- P60 (tax year ended 5th April 2021)
- Evidence of self-employment income (tax year ended 5th April 2021)
- Last 3 months Payslips for all household adults
- Other benefits/pension award letter



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For Category B (ii) please tick the relevant statement:

- Student is eligible for Free School Meals
- Student was eligible for 'Pupil Premium' in Year 11.
- The student or family currently face exceptional circumstances (please attach a letter of explanation).

**Category B Amount requested £** \_\_\_\_\_

Category	Amount £	Details (attach receipts)
Books/Equipment		
Transport		
Meals		
Additional course costs (e.g. trips)		
Exam re-sit fees		
Other (please specify)		

### Bank account details for payment:

Bank:	
Account holder name:	
Sort code:	
Account Number	

I confirm that the information provided in this form and the accompanying evidence are true and accurate. I understand that the information provided may be shared with other departments within the school, including the Finance department.

Signed (student): \_\_\_\_\_  
Date: \_\_\_\_\_

For Internal Use – confirmation of eligibility:

Signed: \_\_\_\_\_  
Date: \_\_\_\_\_  
Name: \_\_\_\_\_  
Position: \_\_\_\_\_

### For finance use only:

<i>Maximum Fund £</i>	<i>Claimed to date: £</i>
<i>Amount of this claim £</i>	<i>Balance remaining £</i>

