



South East Cornwall Multi Academy Regional Trust

16 – 19 Bursary Fund Policy for 2020/21 Academic Year

Date	Changes
06/07/20	First draft of Trust wide policy
07/07/20	Format changes
10/07/20	Final draft ready for submission
16/07/20	Submitted to the Resources Committee (recommended by Committee)
22/07/20	Submitted to Trust Board for approval
24/07/20	Approved by Trust Board

Adopted Date: 24 July 2020

Current Status: Approved by Trust Board

Review Date: Summer Term 2021

This Policy will be reviewed and revised at least annually in response to any changes in government guidance

Contents

Introduction	3
Who is eligible?	3
Grant funding available	3
Eligibility criteria: Group 1	3
Pro-rata bursaries for vulnerable groups	4
Evidence of eligibility	4
Eligibility criteria: Group 2	4
What can the bursary fund be used for?	5
What the bursary fund cannot be used for	5
Conditions for receiving bursary funding	5
How to make a claim	6
Notification of qualification for Bursary	6
Paying bursary funding to eligible students	6
Appeals	6
Administration contribution	6
Recovering Funds due to Fraud	6
Rules on Unspent Bursary Funds	6
Audit, assurance and fraud	7
Appendix 1	8
Appendix 2	12
Appendix 1	16
Appendix 2	20

Introduction

The 16 to 19 Bursary Fund is made available from the Government through the Education Skills Funding Agency (ESFA) and provides financial support to help students overcome specific financial barriers to participation so they can remain in education.

The Trust's policy has been developed in line with the ESFA guidance to ensure that all students are treated in a fair and consistent way.

Who is eligible?

There are two types of 16 to 19 bursaries and a student must be aged 16 or over but under 19 at 31 August 2020 to be eligible for help from the bursary fund in the 2020-21 academic year:

- Bursaries for defined vulnerable groups
- Discretionary bursaries which the Trust award to meet individual needs; for example, help with the cost of transport, meals, books and equipment.

Grant funding available

- The Vulnerable bursary grant is claimed by the Trust from the ESFA on an individual claim/student basis
- The Discretionary bursary grant is allocated to the Trust by the annual 16-19 formulaic bursary grant awarded from the ESFA. This is a set amount for the Trust to distribute in line with the policy. The Trust will set aside 20% of the 16-19 Discretionary Bursary amount provided to accommodate changes in circumstance and ensure that requests for funding from students received after 30th September can be accommodated.

Eligibility criteria: Group 1

Bursaries for young people in defined Vulnerable groups

The defined vulnerable groups are students who are:

- 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 bursary for vulnerable groups can pay up to £1,200 per year to a student participating on a study programme that lasts for 30 weeks or more. Students on study programmes of less than 30 weeks will be paid a pro-rotta amount.

Definitions of students in Vulnerable Groups can be found in the ESFA guidance:

<https://www.gov.uk/guidance/16-to-19-bursary-fund-guide-2020-to-2021-academic-year>

Pro-rata bursaries for vulnerable groups

The Trust may decide that although a young person may be eligible for a bursary because they are in one or more of the defined vulnerable groups, they do not have any actual financial need. This might be because their financial needs are already met and/or because they have no financial costs in their chosen subjects. The Trust can refuse a student's application on this basis. Similarly, students should only receive the amount they actually need to participate and not automatically receive £1,200 if they do not need the full amount. Equally, the Trust can pay a bursary to a vulnerable group student of more than £1,200 if they assess they need extra help to remain in education. Any payments over £1,200 must be paid from the Trust's discretionary bursary allocation or from their own School Budget funds.

Evidence of eligibility

The Trust must obtain proof that students are eligible for a bursary for **vulnerable** groups and will retain copies for audit purposes. For example:

- 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. The evidence could be a letter or an email from the local authority
- For students in receipt of Income Support or Universal Credit, a copy of their Income Support or Universal Credit 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 Universal Credit, the Trust must also see a tenancy agreement in the student's name, a child benefit receipt, children's birth certificate, utility bills etc
- For students receiving UC/ESA and Disability Living Allowance and Personal Independence Payments, a copy of their UC claim form DWP (UC claimants should be able to print details of their award from their online account). Evidence of receipt of Disability Living Allowance or Personal Independence Payment, must also be provided.

Eligibility criteria: Group 2

Discretionary bursaries

If your total gross household income is below £25,000 you will be able to apply for a bursary award. Evidence of household gross income will be required and may include:

- P60 or 2 months' pay slips or 4 weekly slips dated within 3 months
- 2020 audited accounts or 2020 official tax return or Tax credits award 2020-21 showing self-employed income
- Pension – official letter showing an ongoing pension dated 2020 onwards;
- Universal credit and Earnings above £7,400 per year – all pages of the latest 3 awards statements for 2020 onwards showing earning for each period

- Council Tax Reduction – all pages of an official letter showing ongoing benefit for 2020 onwards
- Child Tax Credit and Income above £16,190 per year-all pages of the 2020-21 tax credit award or bank statements showing 3 consecutive payments dated within 3 months
- Child Benefit – all pages of an official letter showing an ongoing benefit for 2019 onwards or bank statements showing 3 consecutive payments dated within 3 months
- Other – please specify.

The application will be considered by the Trust's Bursary Committee during the first term of the academic year therefore claims must be submitted by 30th September for consideration. Any ad hoc claims after this date will be considered on the basis of the 20% funds remaining and on a first come first served basis. Students and their parents/carers should understand that the available fund is limited.

The Bursary Committee is made up of the Head of Sixth Form, the Finance Manager and the Sixth Form Administrator. The Head of Sixth Form will offer information to the Committee about a student's circumstances, well-being, behaviour, progress and attendance.

Application for a bursary does not guarantee receipt of bursary funds.

What can the bursary fund be used for?

- Books/materials/equipment
- Free/subsidised school meals
- Trips and enrichment
- UCAS fees and University open day visits
- Professional clothing for attendance at Sixth Form or interview
- Other items relevant to the individual student, this can include sportswear if appropriate to students post 16 course
- Travel – help with transport costs.

What the bursary fund cannot be used for

The bursary fund is not intended to provide learning support – for example, counselling or mentoring, or to support extra-curricular activities where these are not essential to the students' study programme.

Conditions for receiving bursary funding

The bursary for vulnerable groups and, the discretionary bursary is conditional on the student having satisfactory attendance, performance and behaviour.

How to make a claim

To make a claim, complete the application form included in this policy for the relevant school Sixth Form at:

- Appendix 1 for Group 1 Vulnerable bursary
- Appendix 2 for Group 2 Discretionary bursary.

Notification of qualification for Bursary

Students will receive a letter confirming receipt of their application to the '16-19 Bursary Fund' along with the support allocation awarded by the Bursary Fund Committee and, if appropriate, a payment scheme.

Paying bursary funding to eligible students

ESFA encourages institutions to pay bursaries in-kind rather than cash as far as possible.

It does not recommend that large or lump sum bursary payments are made to students.

Any bursary payments made to you will be by BACS and outlined in detail when the award is made. Bank details must be in the student's name.

Exceptions can be made only if there are extenuating circumstances.

Appeals

Any student wishing to appeal against the Support Level allocated should do so in writing within two weeks of receiving their letter of Support Allocation. Appeals should be made to the Trust's Sixth Form Administrator and further evidence to support the claim may be called upon. This will then be considered by the Trust's Chief Financial Officer.

Administration contribution

The Trust is permitted to use up to 5% of their allocation for administrative costs.

Recovering Funds due to Fraud

The Trust is responsible for investigating instances of fraud relating to bursary fund applications. Significant fraud involves one or more of the following:

- The amount of money is over £1,200;
- The particulars of the fraud are novel, unusual, systemic or complex;
- There is likely to be great public interest because of the nature of the fraud or the people involved.

Rules on Unspent Bursary Funds

The ESFA permits institutions to carry unspent bursary funds over to the next academic year and must continue to be used to support students in this category. The Trust must fully utilise any unspent funds for either discretionary bursary or free meals before using the new academic year allocation. Any remaining funds must be returned to the ESFA.

Audit, assurance and fraud

16 to 19 Bursary Funds are subject to normal assurance arrangements for 16 to 19 education and training.

The Trust will retain copies of any documents the student has signed to give formal agreement to their conditions for payment.

Hard or scanned copies of documentation will be retained for 6 years.

Examples of documentation include:

For the bursary for vulnerable groups:

- A copy of the funding claim sent to Student Bursary Support Service (SBSS);
- Evidence showing that the student is eligible, for example, a letter from Department for Work and Pensions (DWP) or the local authority or a copy of the student's online Universal Credit statement;
- Evidence of payments received from the Student Bursary Support Service (SBSS), for example bank statements and remittance advices;
- A copy of the student's individual assessment of actual financial need;
- Evidence of payments made to the student.

For the discretionary bursary:

- Evidence used to assess eligibility and determine household income, such as P60s, self-employment credit;
- A copy of the student's individual assessment of actual financial need;
- Receipts for purchases made, for example, bus pass, lunch receipts or book receipts.

Further ESFA guidance and information is available on:

<https://www.gov.uk/guidance/16-to-19-bursary-fund-guide-2020-to-2021-academic-year>



LISKEARD
SIXTH FORM

16 to 19 Bursary Fund Application 2020-21
Group 1: Vulnerable Bursary Application

Please read the Trust's Bursary guidance carefully before completing and submitting your application.

Group 1 (Section A) to be completed by the Student

Vulnerable Group Bursary – for looked after students, those in care, care leavers, students receiving Income Support (or Universal Credit) in their own name and disabled students in receipt of both Employment Support Allowance and Disability Living Allowance (or Personal Independence payments).

Section A			
Student's full name:		Tutor Group	
Student's full address (including post code):			
Contact telephone number:			
Email address:			

I wish to claim support from the 16 to 19 vulnerable bursary fund, and I provide the following information as evidence of my personal circumstance (please tick as appropriate and attach documentary evidence)	
	<i>Tick as appropriate</i>
Written Local Authority evidence of looked-after or care status.	
HMRC evidence e.g. Tax credit award, Pension credits and Universal credits.	
Employment Support Allowance, Job Seekers & Income Support in my own name combined with Disability Living Allowance or Personal Independence Payments.	
Housing Benefit.	
Information provided is for the purpose only and will be treated in the strictest confidence.	

<p>I confirm that I have read the Trust's attached guidance, and the information provided on this form is correct.</p> <p>I understand that any false information given, or failure to notify the Sixth Form administrator of a change in personal circumstances, will result in disqualification of support.</p>	
Student signature:	Date:
Parent/Guardian signature:	Date:

Group 1 (Section B) to be completed by Bursary Fund Administrator

Section B	
<p>I have seen the evidence required for the full bursary and have placed copies in the student's file.</p>	
Bursary Committee members in attendance:	Date of meeting
Award Approved/amount:	Date
Action agreed to reimburse the Student:	
Administrator Name & signature:	Date
Finance authorisation:	Date

Group 1 (Section D) to be completed by the Student

Section D
Student Bank/Building Society Details
To receive payments you must have a bank account in your own name. 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 Address:.....
Account Number:.....Sort Code:.....

Please note that if your application for the 16 – 19 Bursary Fund is unsuccessful these details will be shredded. For those that are successful, these details will be kept securely and confidentially.



16 to 19 Bursary Fund Application 2020-21
Group 2: Discretionary Bursary Application

Please read the Trust's Bursary guidance carefully before completing and submitting your application.

Group 2 (Section A) to be completed by the Student

Discretionary bursary for students from lower income households up to **£25,000**

Section A			
Student full name:		Tutor Group	
Students full address (including post code):			
Contact telephone number:			
Email address:			

I wish to claim support from the 16 to 19 bursary fund, and I provide the following information as evidence of my personal circumstance (please tick as appropriate and attached documentary evidence)	
	<i>Tick as appropriate</i>
P60 or 2 months' pay slips or 4 weekly slips dated within 3 months.	
2020 audited accounts or 2020 official tax return or Tax credits award 2020-21 showing self-employed income.	
Pension – official letter showing an on-going pension dated 2020 onwards.	
Universal credit and Earnings above £7,400 per year – all pages of the latest 3 award statements for 2020 onwards showing earnings for each period.	
Council Tax Reduction – all pages of an official letter showing ongoing benefit for 2020 onwards.	
Child Tax Credit and Income above £16,190 per year-all pages of the 202-21 tax credits award or bank statements showing 3 consecutive payments dated within 3 months.	
Information provided is for this purpose only and will be treated in the strictest confidence.	

<p>I confirm that I have read the attached guidance, and the information provided on this form is correct.</p> <p>I understand that any false information given, or failure to notify the Sixth Form administrator of a change in personal circumstances, will result in disqualification of support.</p> <p>I understand that I may have to repay part or all of this assistance offered if my attendance, conduct or progress is not satisfactory.</p>	
Student signature:	Date:
Parent/Guardian signature:	Date:

Group 2 (Section B) to be completed by Bursary Fund Administrator

Section B	
I have seen the evidence required for the full bursary and have placed copies in the student's file.	
Bursary Committee members in attendance:	Date of meeting
Award Approved/amount:	Date
Action agreed to reimburse the Student:	
Administrator Name & signature:	Date
Finance authorisation:	Date

Group 2 (Section D) to be completed by the Student

Section D
Student Bank/Building Society Details
<p>To receive payments you must have a bank account in our own name. If you do not have a bank account, you need to open one before completing this form.</p> <p>Name of Account Holder:.....</p> <p>Name of Bank:.....</p> <p>Branch Address:.....</p> <p>Account Number:.....Sort Code:.....</p>

Please note that if your application for the 16 – 19 Bursary Fund is unsuccessful these details will be shredded. For those that are successful, these details will be kept securely and confidentially.



16 to 19 Bursary Fund Application 2020-21 Group 1: Vulnerable Bursary Application

Please read the Trust's Bursary guidance carefully before completing and submitting your application.

Group 1 (Section A) to be completed by the Student

Vulnerable Group Bursary – for looked after students, those in care, care leavers, students receiving Income Support (or Universal Credit) in their own name and disabled students in receipt of both Employment Support Allowance and Disability Living Allowance (or Personal Independence payments).

Section A			
Student's full name:		Tutor Group	
Student's full address (including post code):			
Contact telephone number:			
Email address:			

I wish to claim support from the 16 to 19 vulnerable bursary fund, and I provide the following information as evidence of my personal circumstance (please tick as appropriate and attach documentary evidence)

	<i>Tick as appropriate</i>
Written Local Authority evidence of looked-after or care status.	<input type="checkbox"/>
HMRC evidence e.g. Tax credit award, Pension credits and Universal credits.	<input type="checkbox"/>
Employment Support Allowance, Job Seekers & Income Support in my own name combined with Disability Living Allowance or Personal Independence Payments.	<input type="checkbox"/>
Housing Benefit.	<input type="checkbox"/>

Information provided is for the purpose only and will be treated in the strictest confidence.

<p>I confirm that I have read the Trust's attached guidance, and the information provided on this form is correct.</p> <p>I understand that any false information given, or failure to notify the Sixth Form administrator of a change in personal circumstances, will result in disqualification of support.</p>	
Student signature:	Date:
Parent/Guardian signature:	Date:

Group 1 (Section B) to be completed by Bursary Fund Administrator

Section B	
<p>I have seen the evidence required for the full bursary and have placed copies in the student's file.</p>	
Bursary Committee members in attendance:	Date of meeting
Award Approved/amount:	Date
Action agreed to reimburse the Student:	
Administrator Name & signature:	Date
Finance authorisation:	Date

Group 1 (Section D) to be completed by the Student

Section D
Student Bank/Building Society Details
To receive payments you must have a bank account in your own name. 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 Address:.....
Account Number:.....Sort Code:.....

Please note that if your application for the 16 – 19 Bursary Fund is unsuccessful these details will be shredded. For those that are successful, these details will be kept securely and confidentially.



16 to 19 Bursary Fund Application 2020-21 Group 2: Discretionary Bursary Application

Please read the Trust's Bursary guidance carefully before completing and submitting your application.

Group 2 (Section A) to be completed by the Student

Discretionary bursary for students from lower income households up to **£25,000**

Section A			
Student full name:		Tutor Group	
Students full address (including post code):			
Contact telephone number:			
Email address:			

I wish to claim support from the 16 to 19 bursary fund, and I provide the following information as evidence of my personal circumstance (please tick as appropriate and attached documentary evidence)	
	<i>Tick as appropriate</i>
P60 or 2 months' pay slips or 4 weekly slips dated within 3 months.	
2020 audited accounts or 2020 official tax return or Tax credits award 2020-21 showing self-employed income.	
Pension – official letter showing an on-going pension dated 2020 onwards.	
Universal credit and Earnings above £7,400 per year – all pages of the latest 3 award statements for 2020 onwards showing earnings for each period.	
Council Tax Reduction – all pages of an official letter showing ongoing benefit for 2020 onwards.	
Child Tax Credit and Income above £16,190 per year-all pages of the 202-21 tax credits award or bank statements showing 3 consecutive payments dated within 3 months.	
Information provided is for this purpose only and will be treated in the strictest confidence.	

<p>I confirm that I have read the attached guidance, and the information provided on this form is correct.</p> <p>I understand that any false information given, or failure to notify the Sixth Form administrator of a change in personal circumstances, will result in disqualification of support.</p> <p>I understand that I may have to repay part or all of this assistance offered if my attendance, conduct or progress is not satisfactory.</p>	
Student signature:	Date:
Parent/Guardian signature:	Date:

Group 2 (Section B) to be completed by Bursary Fund Administrator

Section B	
I have seen the evidence required for the full bursary and have placed copies in the student's file.	
Bursary Committee members in attendance:	Date of meeting
Award Approved/amount:	Date
Action agreed to reimburse the Student:	
Administrator Name & signature:	Date
Finance authorisation:	Date

Group 2 (Section D) to be completed by the Student

Section D
Student Bank/Building Society Details
<p>To receive payments you must have a bank account in our own name. If you do not have a bank account, you need to open one before completing this form.</p> <p>Name of Account Holder:.....</p> <p>Name of Bank:.....</p> <p>Branch Address:.....</p> <p>Account Number:.....Sort Code:.....</p>

Please note that if your application for the 16 – 19 Bursary Fund is unsuccessful these details will be shredded. For those that are successful, these details will be kept securely and confidentially.