

E-ACT Sixth Form Bursary Policy - 2024/25

Policy owner	Chief Financial Officer / National Director of Secondary
Approver	Executive Leadership Team
Approved	Sept 2024
Next review	July 2025
<p>Unless there are legislative or regulatory changes in the interim, this policy will be reviewed annually.</p> <p>If no substantive changes are required at that point, the policy will move to the next review cycle.</p>	

Purpose:

The 16 to 19 Bursary Fund provides financial assistance to help students overcome financial barriers that may prevent them from continuing their education.

Types of Bursaries:

1. Vulnerable Group Bursaries: Available for students in defined vulnerable groups.
2. Discretionary Bursaries: Awarded by based on the E-ACT's own policy, aligned with funding rules.

Eligible Uses:

Bursary funds can be used to cover necessary costs related to education, including:

- Travel expenses to and from school.
- Essential books, equipment, or specialist clothing required for the study program.

Restrictions:

Bursary funds cannot be used for:

- Learning support services (e.g., counselling or mentoring).
- Extra-curricular or non-compulsory activities unrelated to the study program.
- Living expenses.

Policy Statement

The purpose of this policy, in accordance with the guidelines set down by the ESFA (Education Standards Funding Agency) is to:

1. Ensure that the funds received annually from the ESFA are targeted towards students identified as facing the greatest need to ensure that they are supported through their education.
2. Ensure financial sustainability through the flexible development of ESFA funds received, thereby preventing an overspend in any cycle of funding.
3. Ensure any personal financial details remain secure and confidential.
4. Set relevant controls to minimise the risk of fraudulent claims.
5. The academy has reviewed the ESFA 16 to 19 Bursary guidance in writing this policy.

<https://www.gov.uk/government/publications/16-to-19-bursary-fund-guide-2024-to-2025-academic-year/16-to-19-bursary-fund-guide-2024-to-2025-academic-year>

Policy Review

The review of this policy will take place annually by the Chief Financial Officer and the National Director of Secondary Education and will be approved by the Executive Leadership Team

1 Assessment of needs

We will ensure that bursary funding is awarded based on the actual needs of each student, not just their eligibility.

Needs Assessment:

- Each student will receive support based on their specific participation needs, rather than a fixed or flat rate.
- This individualised assessment will be conducted annually, even if we do not reassess household income for the discretionary bursary each year.

Bursary Allocation:

- Both discretionary bursaries and those for defined vulnerable groups are intended to help students overcome their unique financial barriers to participation.
- Bursary funds will only be provided to cover the actual costs students incur to participate in their education.

1.2 Checklist to support application assessment

The Academy will use the Bursary Checklist when assessing bursary applications from students and administering the 16 to 19 Bursary Fund.

2 Essential participation costs

Purpose:

The bursary fund is designed to assist students with essential costs related to their study program.

Eligible Expenses:

- Costs for essential books, equipment, and travel to school or college.
- Additional childcare support costs for young parents receiving [Care to Learn \(C2L\)](#) when expenses exceed the scheme's maximum weekly rates.

Childcare Support costs:

- Only eligible childcare providers under C2L rules will be used.
- We will confirm that the maximum C2L amount is being paid before providing any additional support.
- Any top-up payments will follow C2L guidelines and be paid directly to the childcare provider.

Restrictions:

The bursary fund cannot be used for:

- Non-education-related costs (e.g., living expenses).
- Extra-curricular or non-compulsory activities.
- Learning support services (e.g., counselling, mentoring, or extra tutoring).

3. Returning unspent 16 to 19 Bursary Funds

Carry Forward Limitation:

- Bursary funds cannot be carried forward for more than one year, as per DfE guidance.

Reporting Unspent Funds:

- We will report any unspent bursary funds from previous years
- Unspent funds will be reported via the [customer help centre](#), specifying the amount and the relevant year(s).
- This reporting will be done as soon as we are aware of the unspent funds and no later than March 31 each year.

4. Household Income checking

Annual Eligibility Check:

- We will ensure that students are eligible for the discretionary bursary each year they seek support.

Household Income Verification:

- We may choose to verify household income either annually or only once at the start of the student's study program.
- If annual checks are not conducted, we will require a signed and dated self-declaration form from the student, confirming that their household circumstances have not changed. This can be in hard copy or electronic format.

5. Emergency meal support

Purpose:

In cases of severe hardship, the bursary fund may be used to provide meal support without the usual household income checks or evidence.

Application:

- This flexibility applies only in exceptional cases and is expected to be used for a very small number of students.
- Meal support can be provided on the days a student attends their study program.

Audit Requirements:

We will retain the following records:

- The number of students receiving this support.
- The number of days support is provided.
- The total value of support given to each student and the reason for it.
- Receipts for food expenditures or signed confirmation from the student of receipt of funds for food.

Short-Term Arrangement:

- This emergency meal support is temporary and not ongoing for any individual student.
- The student's household income and participation needs will be assessed as usual for future support.
- This flexibility applies only to food support.

6. Eligibility criteria: all bursaries

6.1 Age Requirements

- Students must be 16 or over but under 19 on August 31, 2024, to qualify for the bursary fund for the 2024 to 2025 academic year.

Exceptions:

- Students aged 19 or over can receive a discretionary bursary if they:
 - Are continuing a study program they started between ages 16 and 18 (19+ continuers).
 - Have an Education, Health, and Care (EHC) plan.

Additional Notes:

- 19+ students can receive a discretionary bursary as long as they remain eligible and need the support to continue their education. However, they are not eligible for bursaries for vulnerable groups.
- Bursaries are generally for students aged 16 and over. In exceptional cases, bursaries may be given to students under 16 if they are on a funded 16 to 19 study program (e.g., an accelerated study program).
- Students enrolled at another institution that receives public funding for them are not eligible for the bursary fund. For example, students aged 14 to 16 who are attending college as part of their key stage 4 programme at a local school/ academy. The [ESFA funding regulations](#) for post-16 provision provides more detail about funded 14 to 16 year olds.
- Students under 19 enrolled in higher education qualifications are not eligible for the 16 to 19 Bursary Fund.

6.2 Eligible education provision

Eligibility Criteria:

- Students must be enrolled in a program inspected by a public body (e.g., Ofsted) that assures quality.
- The program must fall into one of the following categories:
 - Funded directly by the DfE or through a local authority.

- Publicly funded and leading to a [qualification accredited by Ofqual or approved for funding](#) (up to Level 3).

Ineligibility:

- Students on apprenticeship programs, waged training, or those employed are not eligible for the 16 to 19 Bursary Fund.

Special Cases:

- Non-employed students aged 16 to 19 participating in a Prince's Trust Team Programme are eligible for the bursary, just like any other student in an eligible, publicly funded course.

Distance Learning:

- Students on distance learning programs are generally not expected to need bursary support due to the lack of associated costs like travel or equipment.
- In rare cases where financial help is needed, support may be provided in-kind, such as a temporary travel pass for attending exams.

6.3 Residency

Residency Requirements:

- Students must meet the residency criteria outlined in [ESFA funding regulations](#) for post-16 education.

Evidence Requirements:

- We will collect and keep evidence to confirm a student's eligibility for post-16 funding and bursary fund eligibility.
- This evidence is required for audit purposes.

6.4 Asylum seekers and Bursary Funding

Eligibility for Public Funds:

- Generally, asylum seekers cannot receive public funds.
- Asylum-seeking children under 18 with an adult relative or partner, and those aged 18 and above, are entitled to education but not public funds.
- Destitute asylum seekers can apply to the Home Office for housing and essential cash but are not eligible for other income.

Support Provided:

- We will provide in-kind support to asylum seekers, such as books, equipment, or a travel pass, as long as their asylum application has not been refused.
- Cash support is not provided to asylum seekers, except for unaccompanied asylum-seeking children (UASC).

6.5 Support for unaccompanied asylum-seeking children

Eligibility for Bursary:

- Unaccompanied asylum-seeking children, who are under the care of the local authority, are eligible for a bursary as part of the 'in care' group if they have financial needs.

Support Upon Reaching 18:

- When they turn 18, their eligibility for bursary support depends on their immigration status:

If their asylum claim is approved, they will receive support similar to care leavers and remain eligible for the bursary until they reach the [upper age limit](#).

If their asylum claim is refused, they may not legally stay in the UK and will not be eligible for public funds, except in cases where withdrawing support would breach human rights

7. Bursary for Vulnerable Groups

Eligibility and Application:

- Students in financial need who meet the criteria can apply for the bursary for vulnerable groups.
- The bursary is designed to support students who may not receive financial help from parents or carers.

Support Provided:

- Bursaries cover essential costs like travel, books, equipment, and specialist clothing needed for participation.
- The bursary is not for learning support services (e.g., counselling), extra-curricular activities, or living costs.

Award Amount:

- Support is based on assessed needs, not a fixed £1,200.
- Students on study programs lasting 30 weeks or more may receive up to £1,200 annually, while those on shorter programs will get a pro-rata amount.
- The amount may vary depending on the number of study hours per week.

Defined Vulnerable Groups:

- In care
- Care leavers
- Receiving Income Support (IS) or Universal Credit (UC) for self-support or supporting dependents
- Receiving Disability Living Allowance (DLA) or Personal Independence Payments (PIP) along with Employment and Support Allowance (ESA) or UC

Legacy Benefits:

- New claims for legacy benefits have been closed since 2018, so students aged 16-18 will not receive these. Students aged 19-25 may still receive legacy benefits.

Additional Considerations:

- Students may receive more than £1,200 if extra support is needed, with additional funding coming from discretionary bursaries or other funds.
- The eligibility for a bursary does not automatically guarantee a free meal in further education. [Free meals in further education](#) has its own eligibility criteria

Decision-Making:

- We will ensure each student's financial need is assessed. Applications may be refused if the student does not have actual financial needs.
- We will keep detailed records of all bursary awards, including the purpose and amount of funding

7.1 Definition of "in care" and "care leaver" for Bursary Fund eligibility

In Care:

- Defined as children looked after by a local authority under:
 - Section 20 of the Children Act 1989 (voluntary basis)
 - Section 31 of the Children Act 1989 (care order)
- For details, refer to Section 22 of the Children Act 1989.

Care Leaver:

1. Aged 16 or 17 who was looked after for at least 13 weeks (consecutive or combined), starting after age 14 and ending after age 16.
2. Aged 18 or above who was looked after for at least 13 weeks (consecutive or combined), starting after age 14 and ending after age 16.

Eligibility:

- Only students who meet these definitions and have financial needs are eligible for the bursary.

7.2 Eligibility for Bursary Fund - Foster care, including privately arranged foster care

Foster Care:

- Young people placed with a foster carer by the local authority, including those with carers from independent fostering agencies, are considered 'in care' and may be eligible for the bursary if they have financial needs.

Not Eligible:

- Children in private foster care arrangements (arranged between parents and private carers) are not considered 'looked after' and are not eligible for the bursary for vulnerable groups.

Care Leavers:

- If a young person transitions from local authority care to a permanent arrangement like a Special Guardianship Order, they are classified as a care leaver.
- To qualify for the bursary, they must meet the 'care leaver' criteria (13 weeks of care, starting after age 14 and ending before or at age 16) and need financial support to participate

7.3 Universal Credit (UC) and Bursary Fund Policy

Universal Credit (UC) Transition:

- UC has replaced Income Support (IS), Employment and Support Allowance (ESA), and other benefits for new claimants.
- UC notifications do not specify which benefits have been replaced.

Bursary Eligibility:

- To qualify for bursaries for vulnerable groups under UC, students must be receiving UC in their own right. This applies if they are financially supporting themselves and any dependents living with them (e.g., a child or partner).

Legacy Benefits Review:

- The DfE is reviewing how legacy benefits descriptions are reflected in the vulnerable groups criteria and this policy will take into account any updated guidance.

Bursary Fund and UC Assessment:

- Bursary funds are not included in the UC assessment by the Department for Work and Pensions (DWP).
- The impact of bursary funding on UC depends on whether the student is in advanced full-time education.

Eligibility for 16 to 18-Year-Olds:

- It is unlikely that 16 to 18-year-olds are in advanced full-time education, as they usually participate in level 3 or below study programs.
- Since the full rollout of UC, 16 to 18-year-olds can only claim UC, not IS or income-related ESA.

Treatment of Educational Awards under UC:

- Educational awards, including the 16 to 19 Bursary, do not count as grant income for UC purposes under regulation 68(7) of the UC Regulations 2013.

7.4 Proof of Evidence of eligibility for Bursary for Vulnerable Groups

Required Evidence:

1. **In Care / Care Leaver:**
 - Provide written confirmation from the relevant local authority (current or previous). This can be a letter or email.

2. Universal Credit (UC) / Income Support (IS):

- Submit a copy of the UC or IS award notice showing it is in the student's name. Ensure it does not include conditions that prevent further education. For UC claimants, additional documents such as a tenancy agreement, child benefit receipt, or utility bills may be required.

3. UC/ESA and DLA/PIP:

- Provide a copy of the UC claim from DWP and evidence of DLA or PIP receipt.

Submission and Verification:

- UC claimants can print or screenshot their award details from their online account.
- Students can also request evidence from their UC work coach or relevant benefit office if receiving IS or ESA.

Claim Process:

- We submit funding claims through the [Student Bursary Support Service \(SBSS\) online portal](#).
- Claims will be processed only after verifying eligibility and assessing the actual financial need, not automatically set at £1,200.

7.5 Pro-rata bursaries for vulnerable groups

Students who meet the criteria for a bursary for vulnerable groups, who have a financial need, but are on a study programme that lasts for less than 30 weeks will be given a bursary on a pro-rata basis. The actual amount is dependent on the assessment of their specific financial needs.

For example:

- a student is on a 30-week programme. If you assess they have financial needs that require a full £1,200, the bursary may be $£1,200 \div 30 = £40$ per week
- if the same student was on a 10-week programme, the pro-rata bursary may be $£40 \times 10 \text{ weeks} = £400$

We will also consider the number of hours involved in a student's study programme when deciding if a pro-rata payment is more appropriate. A student studying for around 16 hours a week is likely to have greater costs than a student studying for 4 hours a week, for example. We do recognise that some study programme costs may be 'fixed' in nature, for example, course equipment costs.

7.6 Young people eligible for a bursary for vulnerable groups who do not require bursary funding

In some cases, a young person might meet the eligibility criteria for a bursary for vulnerable groups, but their financial needs are already met and/or they have no relevant costs.

For example, a student:

- attending specialist residential provision that covers their educational costs in full.

- taking a distance learning programme who has no financial barriers to participation (for example, they do not have any travel costs or meal costs)
- in the care of the local authority whose educational costs are covered in full by the local authority
- who is financially supported by their partner

In these circumstances, we can refuse the student's application. We will explain to the student and their support worker/parent where applicable, the aim of bursary funding and why we are not awarding any bursary.

We are clear in our bursary fund application form that there is a possibility of no award or a limited award. This ensures all parties understand that meeting the criteria for a bursary for vulnerable groups does not automatically entitle them to funding and that an assessment of their actual costs will be undertaken.

8. Application processing:

- The bursary fund application form specifies that funding is not guaranteed. An assessment of actual costs will be conducted to determine the amount of support, if any.
- If a student's application is refused, we will provide a clear explanation to the student and their support worker or parent, detailing the bursary's purpose and the reason for the refusal.

9. Policy review, monitoring and compliance

We will regularly review our bursary policy to ensure it effectively supports students who need financial assistance, especially those with lower income jobs or higher essential costs.

- **Note:** Students from lower-income households or those with significant financial challenges may receive more support compared to those only receiving free school meals or other benefits

Monitoring and Compliance

Monitoring and compliance of the policy will be completed by the Education Directors.

Review

This policy will be reviewed by Executive Leadership Team annually.

10. Accessibility and Communication:

This policy will be published on the Academy website. Please request a printed version from the Academy.

Please email [Governance.Team@ E-ACT.org.uk](mailto:Governance.Team@E-ACT.org.uk) if you request assistance in accessing the policy document.

Appendix A: Application Form

E-ACT Montpelier High School and V6 Sixth Form Academy Sixth Form Bursary Application Form 2024 - 2025

Please ensure that you have read the E-ACT Sixth Form Bursary Policy before completing this form.

Important

- Your application will not be considered if you do not answer all the appropriate sections and attach relevant documents
- Please answer all the questions clearly and by ticking the appropriate boxes
- Return your completed application form along with the required documentary evidence to the Sixth Form Administrator
- Seek support from Head of Post 16 or Tutor if you require assistance in completing this form.

Please indicate which type of bursary you are applying for:	
	Level One: Vulnerable bursary
	Level Two: Discretionary bursary
	Level Three: Discretionary individual payment

Section 1: Personal Details

Surname:	Forename:	
Date of Birth:	Age at 31/08/2024:	Gender: Male / Female
Telephone Number:	Email address:	
Ethnic origin (CRE categories): White/Irish/Black-African/Black-Caribbean/Black-Other/Indian/Pakistani/Chinese/Bangladeshi/ Other (please specify)		
Previous school (if applicable):		
Address:		

How long have you been resident in the UK?

Level subjects or course of study at Post 16.

- 1.
- 2.
- 3.
- 4.
- 5.

Section 2: Background

Are you a person in care?	Yes*	No
Are you a Young Parent?	Yes*	No
Are you a young person in receipt of Income Support?	Yes*	No
Are you a disabled young person in receipt of Employment and Support Allowance who is also in receipt of Disability Living Allowance?	Yes*	No
Do you have caring responsibility update	Yes*	No
*If you have answered YES to any of the above questions, please attach recent documentary evidence of this with your application form		

Section 3: Household Income

What is your total annual household income? (e.g Earned income, maintenance payments etc.)	Amount:	
<ul style="list-style-type: none"> ▪ Please supply evidence of your household income by way of a recent P60, Receipt of Benefit Notification, Self Employed Income or Tax Credit Award Notice x 3 (so we can estimate annual income) 		
Are you eligible to receive free school meals or have received in past 6 years.	Yes*	No

Section 4: Educational Needs

Please tick the education needs that are applicable to you, together with the annual cost. Please whether this costs is actual or estimated.

Need	Tick	Actual	Estimated
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	(If applicable)	(Cost £pa)	(Cost £pa)
Books (including revision books and aids)			
Lab coat and goggles			
Design technology materials			
Sports equipment			
Other course related equipment, please specify:			
Examination fees and resit fees			
UCAS fees			
Travel to university/apprenticeship open days and interviews.			
Criminal Record Bureau (CRB) Checks			
Sports activities related to course of study			
Public transport costs to school			
Subscriptions for course related publications			
Other costs involved in the contribution of your education, please give details: Please attach a support document.			
Work experience			
Pastoral review notes: (Head of P16 use)			

Section 5: Discretionary Individual Payment

If there is an individual payment that you wish to be considered, please detail it below. This could include information to do with particular set of circumstances which is currently causing financial hardship at home.

Please attach a supporting statement.

Details of what the individual payment will be used for:	Actual (Cost £pa)	Estimated (Cost £pa)

Section 6: Other relevant information

If there is any other information which you would like us to consider when assessing your claim, please detail it below. This could include information to do with a particular set of circumstances which is currently causing financial hardship at home.

Please attach a supporting statement.

Section 7: Student bank account details

(Payments will only be made to student's account) Please provide evidence to show this is your account. E.g. Bank Card, Statement etc.

Account Holder's Name	
Bank Name	
Sort Code	
Account Number	
Tick box to confirm account is student's	Office use only.

Please note that there is a possibility of no award or a limited award. Meeting the criteria for a bursary for vulnerable groups does not automatically entitle you to funding and an assessment of your actual costs will be undertaken.

Section 8: Declaration

I confirm that all information provided on this form is accurate and true. I will notify the Academy immediately of any change in my or my household's circumstances. I understand that the Bursary and Discretionary Bursary is payable provided that certain conditions regarding my attendance, behaviour and effort at school are met, as detailed in the Sixth Form Student Charter. I understand that, if I knowingly gave information which is discovered to be false or failed to notify the school of a change in my or my household's circumstances, the Academy will seek to recover from me any monies to which I am not entitled.

Student signature:	Date:
Parent signature:	Date:

Section 9: Data Protection and Confidentiality

All information and supporting documentation supplied by you with this application will be used for the sole purpose of assessing your application for financial help. Your application and some related information, including the outcome of your application, will be held and maintained in accordance with Data Protection Legislation. The data will not be passed to any other third party without your consent, except when the Academy is required to do so by law. Applications are only seen by the Sixth Form Remission Panel and Academy/Trust Finance colleagues.

All documents relating to student applications will be held for the academic year that the student is claiming the bursary for, and for the purpose of any financial audit, after which all forms and evidence will be destroyed.

If you have any questions, please email v6-info@v6.e-act.org.uk

Office use only - Form checks

Form checked for	Who	Name	Initials	Date
Completeness	6 th Form Admin			
Finance	Finance Team			
Approval	Head of 6 th Form			

Appendix B: Bursary Contract

Sixth Form Bursary Contract

STUDENT NAME: _____

(PLEASE PRINT)

TUTOR GROUP: _____

If your bursary application is approved, you will be paid as outlined in the policy which should be read in conjunction with this application form. In order for you to receive this bursary you need to meet the attendance and behaviour policy of the Academy as detailed on the sixth form website. In addition, the following conditions apply:

- you will attend a minimum of 96% of lessons as detailed on your timetable across the full month. Any payment may be stopped if attendance falls below the required minimum.
- you will be punctual to all lessons and register your attendance
- you will follow the school's absence procedure
- you will meet all action points as set by your subject teachers
- you will meet all deadlines as set by your subject teachers
- you will attend any examinations you are entered for
- you agree to the conditions for receipt of a bursary you are aware that any funding covers only the school year 2024 - 2025

I have read this information and understand the content. I confirm that the details on this application form are true and accurate. If my circumstances change, I will inform my Head of Sixth Form immediately and understand that this may affect future payments.

Student Signature:

Print Name:

Date:

Parent/Carer Signature:

Print Name:

Date: