



SOUTH AXHOLME ACADEMY

16-19 Bursary Fund Policy

This policy applies to South Axholme Academy.

1. Introduction

The 16-19 Bursary Funds are paid by the Education Skills & Funding Agency (ESFA) to Schools, Academies, Colleges and Providers so that they may provide financial help to students whose access to or completion of education might be inhibited by financial consideration. The Bursary Fund will be used to pay Guaranteed Bursaries and Discretionary Bursaries.

2. Policy Aims

- 2.1 To ensure that the 16-19 Bursary Fund is administered in accordance with DfE/ESFA 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 describe the audit principles and the storage of evidence.

3. Criteria and Eligibility for 16-19 Bursary Fund

CRITERIA AND ELIGIBILITY FOR PAYMENT

Each Academy/School/College has been allocated a fixed sum of money for the 16-19 Bursary Fund.

5% of the total will contribute towards centre administrative costs. The remaining 95% will be prioritised and allocated as follows:

Guaranteed Bursary Group: These students will receive up to £1200 for the year based on enrolling on a Full Time (ESFA funded) course and meeting the Student "Commitment Condition" stated below. The Guaranteed Bursary will be pro-rated dependent upon when during the academic year a student applies.

Guaranteed Bursary students are:

- Young people in care
- Care leavers
- Young people personally in receipt of Income Support/Universal Credit
- Disabled young people in receipt of Employment Support Allowance who are also in receipt of Disability Living Allowance/Personal Independence Payments

Please note: Evidence will be required by the school

Discretionary Bursary Group: These students will receive discretionary awards that best fit the needs and circumstances of its students to enable their studies. This could include:

1. Public Transport costs (i.e. rail/bus fares)
(The Academy will not refund petrol costs)
2. Books and Equipment
3. Hardship Costs
4. Additional Course Costs (Residential)
5. Costs of travel to HE interviews
6. Other discretionary areas

Wherever practicable, any equipment purchased should be returned to the academy for future use.

Discretionary Bursary students are:

- Students who have successfully claimed for Free School Meals in the current academic year.
- Students whose household income is less than £30,000 per annum (gross) where a students' wider family circumstances will be considered
- Students who are completing a course with high costs (specialist equipment, etc.)

However, the academy will assess the young person's actual need for financial assistance, before awarding a bursary, taking into account the young person's household income. Learners with a total household income of below £30,000 (gross), or who face exceptionally challenging circumstances, will be eligible to apply for a discretionary bursary. Applications will, exceptionally, also be considered from students whose household income is just above £30,000 (gross) who face particular circumstances which jeopardise their continuing education. The available funds are limited, therefore the discretionary fund must be targeted at learners who **'face the greatest barriers to continuing in education and training post 16'** and eligibility cannot therefore guarantee an award.

Please note: Evidence of household income will be required by the school.

Commitment Condition

Students in receipt of Guaranteed or Discretionary bursaries will be expected to comply with the school policies in respect of attendance (at least 95%), lateness and behaviour.

Exceptional cases and Contingency Fund

South Axholme Academy may hold back a small proportion from the contingency fund for exceptional cases at the discretion of the Principal or to respond to a typical need not identified through a formula approach. In these circumstances a clear record of the background and allocation will be held for audit purposes and the management of how this is fairly and consistently accessed will be carefully considered.

4. Responsibilities

4.1 Students

- 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 as detailed in the Enrolment Form/Prospectus.
- Students must inform the school of changes in their financial circumstances.

4.2 Sixth Form Team

- Oversee the administration of the fund.
- Assist the student to make an appropriate application.
- Ensure the form is completed appropriately and that documentary evidence is provided or confirmed where required.
- Make decisions on applications with a member of Senior Leadership Team.
- Ensure that reasons for the appeals panel's decision are accurately recorded.
- Notify the student at the termly review dates as to whether attendance conditions are being met before making/with holding a payment.
- Act as the first point of contact to receive any appeal.
- Liaise with Finance Office to ensure timely payment of bursary funds.
- Liaise with Finance Office to ensure that audit requirements are met.
- Produce reports on administration of fund for governing body.
- Ensure that fund is publicised in an appropriate manner.

4.3 16-19 Bursary Fund Panel

This will consist of the Sixth Form Strategic Lead and one member of the Senior Leadership Team.

The panel will consider each application and ensure that awards are granted fairly and equitably in accordance with the fund guidelines detailed in this policy.

4.4 The Appeals Panel

The Appeals Panel will be informed by the Senior Leadership Team member involved in the original decision and will consist of the IET Business Manager and a member of the Senior Leadership team not involved in the initial decision.

The Appeals Panel will consider any appeals not resolved by the Sixth Form Strategic Lead

4.5 Finance Manager

- Ensure funds are paid to students in accordance with the decisions of the panel.
- Administer the cash-flow in accordance with audit and ESFA requirements.
- Liaise with Sixth form Admin Support to ensure that audit requirements are met.

4.6 SAX Local Governing Body

- Receive report from Finance Manager – detailing the take-up against the criteria used and a financial analysis of the expenditure.

5. Procedure

To make an application a student must obtain advice from the Sixth Form Strategic Lead and if appropriate, arrange an interview before completing the application form. The purpose of the interview is to advise the student on and to ensure that appropriate documentary evidence is provided.

After the interview or application the Sixth Form Strategic Lead will log the application and will organise 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 application forms will then be checked by the Sixth Form Strategic Lead, to see that the student is meeting the conditions identified in the academy policy.

The application form will be sent to the Finance Office to process the payment.

The academy will retain all relevant documentation and evidence for audit purposes. The records will be stored securely for a period of 6 years after which all records will be confidentially destroyed.

Appeals must be made in writing to the Sixth Form Strategic Lead, explaining clearly what is being appealed and why you believe the decision to be incorrect. This will be passed onto the Appeals Panel to be reviewed. Additional evidence to support the appeal may be required.

6. Appeals Procedure

Students who consider that their claim has been inappropriately assessed can appeal by writing to the Sixth Form Strategic Lead giving reasons, normally within 4 weeks of panel decision.

If required, the Sixth Form Strategic Lead will arrange a meeting of the Appeal Panel. The claim will be reassessed and the student informed of the decision in writing within 10 days of the Panel meeting.

7. Timing and Amount of Payments

Students are only eligible for payments if they are legitimately enrolled and attending as defined by the criteria.

Guaranteed Bursary Payment Schedule:

Where an attendance review has been completed and the bursary payment agreed, these will be paid in equal instalments each month.

Important Notes

Students should ensure they have a bank account in their name through which to receive funds.

Discretionary Bursaries

Applications can be made on an ad-hoc basis throughout the year.

8. Review of policy

The policy will be reviewed annually, in accordance with recommendations from the Academy /college/school's audit services and ESFA requirements by the Sixth Form Strategic Lead.

9. Appendices

- 1 Letter to parents
- 2 Bursary Fund Application Form (To be completed)

Dear Parents

16-19 BURSARY FUND

The purpose of this letter is to inform you about financial support which might be available for students whose families have difficulty in supporting their continuing education Post-16. The government has introduced a scheme for Post-16 students called the Bursary Fund.

This scheme allocates a modest amount of money to the academy and Governors have taken on the responsibility of administering the fund.

In line with government policy, **guaranteed bursaries** will be paid to students who are in care or in receipt of income support and to disabled students in receipt of Disability Living Allowance. The remainder of the fund will be allocated by the Governors in the form of discretionary bursaries. Please contact Ms Rock as a matter of urgency if you believe that your son/daughter qualifies for such a guaranteed bursary.

Applications for **discretionary bursaries** will be considered from Year 12/Year 13 students. Students who have successfully claimed Free School Meals for the current academic year and students with a total household income below £30,000 (gross) will be eligible to apply for a discretionary bursary. However, applications will be considered where a total household income is just above £30,000 (gross), but where other circumstances may be considered. The discretionary fund must be targeted at learners who **'face the greatest barriers to continuing in education and training post 16'** and eligibility does not guarantee an award if South Axholme Academy judges other applications to have greater priority. Please note that during the year if you become eligible then you can apply at any point.

The Ministry of Defence has a separate scheme to support the children of servicemen and women killed on active service. The scheme is for students entering both further and higher education. **Further information and details about how to apply** can be found on GOV.UK.

The full policy regarding the administration of the 16-19 Bursary Fund is on the academy website in the Sixth Form section alongside the application form.

If you would like to receive paper copies of the relevant paperwork or require any assistance in completing the application form please contact Ms Rock (Sixth Form Strategic Lead)

Yours faithfully,

Mrs S Thompson

Principal South Axholme Academy/ Head of Trust

South Axholme Academy

16 – 19 Bursary Scheme Application Form 2017/2018

Part 1. Student Details	
First names	Surname/Family Name
Date of Birth	Age on 31 August 2017
Home Address	Home Telephone Number
	Mobile telephone number
	Email address (if you have one and use it regularly)
Postcode:	
Have you been resident in the UK and Islands for the whole of the three year period preceding your course, other than for the purposes of full-time study? YES No If No, please give the date you moved to the UK.	

Part 2. Parents/guardians details	
Title and first names	Surname/Family Name
Home Address (if different from above)	Home Telephone Number
	Mobile telephone number
	Email address
Postcode:	

Part 3. Household details		
Please state who you live with and their relationship to you		
Name	Relationship to you e.g. Mother, father, brother etc.	Age if under 16

If any of the following circumstances apply to you, please tick the appropriate box.		
You are 16-18 years, live independently and claim Income Support/Universal Credit		<input type="checkbox"/>
You are looked after by the Local Authority		<input type="checkbox"/>
You are a care leaver		<input type="checkbox"/>
You are 16-18 years and a parent and receive Income Support		<input type="checkbox"/>
You are 16-18 years and receive Income Support for any reason		<input type="checkbox"/>

Please note that all funding is subject to available funds.

Please State What Costs You Need Help With

Expense	Details	Amount Requested
Books and Equipment		£
Fees - Exam Resits		£
Transport Costs to and from School		£
Meals		£
Course Trips		£
Interviews and Open Days at Universities		£
Other Costs Please specify		£
TOTAL AMOUNT REQUESTED		£

Part 5. Income details (for household)		
Type of Income		Evidence required
Income Support/Universal Credit	<input type="checkbox"/>	An award letter which is less than 3 months old on the date of application
Jobseeker' Allowance (Income based)	<input type="checkbox"/>	An award letter which is less than 3 months old on the date of application
Working Tax credit/Child Tax Credit	<input type="checkbox"/>	Pages 1-4 of your most recent Tax Credit Award
Pension Credit (Guarantee credits only)	<input type="checkbox"/>	An award letter which is less than 3 months old on the date of application
Income based Employment and Support Allowance (ESA)	<input type="checkbox"/>	An award letter which is less than 3 months old on the date of application
Other benefits/pensions (please specify)	<input type="checkbox"/>	An award letter which is less than 3 months old on the date of application
Earned income with no additional benefits	<input type="checkbox"/>	Include last 3 monthly wage slips or last 6 weekly wage slips/P60
Self-employed earnings with no additional benefits	<input type="checkbox"/>	Audited accounts or official tax return

Part 6. Declaration

I certify that the information given above is correct and understand that the academy has the right to reclaim any funds and equipment costs, if I am found to have provided incorrect information. I confirm that I/we will be in receipt of one of the benefits or have an annual income of less than £30,000 (gross) stated on the Bursary Fund application form for the whole or part of the duration of the academic year. I/we will inform the school if there is any change to these circumstances during this time.

Failure to inform the school, of any changes in your circumstances could result in any payments already made, being reimbursed to the school.

Signature of parent/guardian or student living independently	Date:
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Part 7. Student Declaration

I agree to comply with the school policies in respect of attendance (at least 95%), lateness and behaviour. I am aware that failure to meet these expectations will result in no further payments being made from the Bursary until these expectations are met.

Signature of student	Date:
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REMEMBER:

Your application will not be assessed unless **you give your full details and enclosed the required documentary evidence of household income.** If you need any further information or support, please contact Ms M Rock.

Please return this form to:

M Rock
Sixth Form Strategic Lead
South Axholme
Academy
Burnham Road
Epworth
DN9 1BY

DOCUMENT CONTROL

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