



ASPIRATIONS



16 TO 19 Bursary Fund Policy

Magna Academy

Version control	
16 to 19 Bursary Fund Policy 2023-07-31	Drafted to align with changes by ESFA to 16-19 Bursary Fund

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1. Aims

Magna Academy Poole are committed to ensuring the 16-19 bursary fund is used to support financially disadvantaged young people taking up or continuing in their education or training post-16 in order to complete their programme of study and achieve their learning goals. Our academy aims to:

- Have clear and transparent processes for the use and allocation of 16 to 19 bursary funds
- Make clear to parents, carers and students the type of support which is available and the means of applying for it
- Make clear to parents, carers and students the attendance and behaviour conditions for receiving the funds

2. Guidance

This policy is based on advice from the Education and Skills Funding Agency (ESFA) on the [16 to 19 bursary fund 2023-2024 academic year](#)

3. Definitions

- 'In care' is defined as: children looked after by a local authority on a voluntary basis (section 20 of the Children Act 1989) or under a care order (section 31 of the Children Act 1989)
- 'Looked after child' is defined as: a child in the care of a local authority or who is provided with accommodation by the authority in the exercise of any functions for more than 24 hours (section 22 of the Children Act 1989) 'Care leaver' is defined as:
 - A young person aged 16 and 17 who was previously looked after for a period of 13 weeks consecutively (or periods amounting to 13 weeks), which began after the age of 14 and ended after the age of 16, or
 - A young person aged 18 or above who was looked after prior to becoming 18 for a period of 13 weeks consecutively (or periods amounting to 13 weeks), which began after the age of 14 and ended after the age of 16

4. Roles and responsibilities

4.1 The governing board

The governing board has overall responsibility for approving this 16 to 19 bursary fund policy, but can delegate this to a committee, an individual governor or the principal.

In our academy, responsibility for approving this policy has been delegated to the Director of Finance

In our academy, monitoring the implementation of this policy has been delegated to the Assistant Principal Sixth Form.

4.2 The principal

The principal is responsible for ensuring staff are familiar with this 16 to 19 bursary fund policy, and that it is being applied consistently.

4.3 Staff

Our staff are responsible for implementing this 16 to 19 bursary fund policy consistently.

The business manager team will provide staff with appropriate training in relation to this policy and its implementation.

4.4 Parents

Parents are expected to notify the Academy of any concerns or queries regarding this 16 to 19 bursary fund policy.

5. How we use the bursary fund

Financial support is available to eligible students from the 16 to 19 bursary fund. See section 6 below for details of our eligibility criteria.

The fund is intended to support students aged 16 to 19 in overcoming specific financial barriers to participation so they can remain in education.

There are two types of 16 to 19 bursaries:

- Bursaries for defined vulnerable groups; and
- Discretionary bursaries

We use the fund to provide students with support to fund:

- Transport to and from school
- Text books, stationery and other equipment
- Lunch during term time
- Business clothing for school or interviews and/or protective clothing
- Field trips and other course-related costs
- UCAS fees
- The costs of attending university interviews and open days

6. Eligibility criteria for the 16 to 19 bursaries

6.1 Age

To be eligible for either bursary in the 2023 to 2024 academic year, students must be at least 16 years old but under 19 years old on 31 August 2023.

Students aged 19 or over are eligible only for a discretionary bursary if they:

- Are continuing on a study programme or course which they began when they were aged 16 to 18 years old, or
- Have an education, health and care (EHC) plan

Students aged 19 or over are not eligible for bursaries for defined vulnerable groups.

In exceptional circumstances, where students under 16 years old are on a funded 16 to 19 study programme at our academy, we may use our discretion to pay bursaries to these younger students. However, if these students are enrolled at another institution that receives public funding for them, they will not be eligible for bursary funding.

6.2 Eligible education provision

Students must be participating in provision that is subject to inspection by a public body that assures quality (e.g. Ofsted). The provision must also fall into one of these groups:

- Be funded directly by ESFA or by ESFA via a local authority;
- Be funded or co-financed by the European Social Fund;
- Be otherwise publicly funded and lead to a qualification (up to and including level 3) that is accredited by Ofqual or is on the ESFA's list of qualifications approved for funding 14 to 19; or
- Be a 16 to 19 traineeship programme
- Non-employed students aged 16 to 19 who are participating in a Prince's Trust Team Programme are also eligible to receive a bursary in the same way as any other student participating in an eligible, publicly funded course.

Students are not eligible if:

- They are on an apprenticeship programme; or
- Are on any waged training

Students who are studying via distance learning are eligible for either 16 to 19 bursary but are likely to require financial help on a more infrequent basis (e.g. travel to exams). If this is the case, we will provide support in-kind, such as a travel pass, details of which shall be decided on a case by case basis.

6.3 Residency

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

6.4 Asylum seekers

Accompanied asylum seekers under 18 with an adult relative or partner and asylum seekers aged 18 and above are entitled to education but are not entitled to public funds. If necessary, they can apply to the Home Office for suitable housing and cash for essentials.

We will provide in-kind support such as books, equipment and a travel pass to asylum seekers who have not had asylum refused.

Unaccompanied asylum seeking children:

- Are the responsibility of the local authority;
- Are to be treated as 'looked after' children; and
- Are eligible for a bursary for vulnerable groups, where they have a financial need.

When these students reach 18 years old, we will consider their immigration status. They will still be eligible for a bursary as a student from a defined vulnerable group if the asylum claim is in their favour and will be treated as a 'care leaver' until they reach the upper age limit.

6.5 Bursaries for young people in defined vulnerable groups

Students with a financial need, who meet one of the following 4 criteria below, in addition to the criteria outlined in sections 6.1, 6.2 and 6.3 above, can apply for a bursary for vulnerable groups.

The defined vulnerable groups are students who are:

- In care (NB: those who are privately fostered are not classed as looked after);
- Care leavers;
- 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; or

- Receiving Disability Living Allowance (DLA) or Personal Independence Payments (PIPs) in their own right as well as Employment and Support Allowance (ESA) or UC in their own right.

Students who meet the criteria for a bursary for vulnerable groups are not automatically entitled to a bursary. Students will not receive the bursary if they do not have any actual financial need (for example, because their financial needs are met from other sources and/or because they have no relevant costs).

Where a bursary is provided, the funds will generally be up to £1,200 per year for study programmes lasting 30 weeks or more. When calculating the amount, we will look at cases individually and base the outcome on a particular student's needs. Students will only receive the amount they actually need to participate and will not automatically receive £1,200 if they do not need the full amount.

If a student's study programme lasts for less than 30 weeks, they will be paid a pro-rata amount. We will also consider the number of hours involved in a student's study programme when deciding whether a pro-rata payment is more appropriate.

We will review the student's eligibility position each academic year. Students will only continue to receive a bursary for vulnerable groups if they continue to satisfy the criteria.

6.6 Discretionary bursaries

In addition to the criteria outlined in sections 6.1, 6.2 and 6.3 above, students can apply for a discretionary bursary if they satisfy one or more of the following criteria:

- Students whose family's income is less than £21,000 a year **will** be eligible for some funds to support them in their studies. (If household income is less than £16,190 a year please complete the free school meals application form if not already done so).
- Students whose family's income is between £21,000 and £25,000 a year and between £25,000 and £30,000 **may** be eligible for some funds to support their studies.

FSM (Free school meal) entitlement can be used as an indicator for eligibility. **The academy will require evidence to confirm eligibility for FSM. The evidence for this will be retained for audit purposes.**

The level of support which the academy can offer is dependent on the total funding received from the Education Funding Agency (EFA) and the number of applications for support that the academy receives. **The level of funding may vary from year to year.**

The level of funding for each individual student will vary to reflect their level of financial need.

Students who do not satisfy any of the criteria listed in this section, but who are able to demonstrate financial hardship arising from other reasons, may apply for a discretionary bursary.

- In assessing any application for a discretionary bursary, we will consider:
- Level of household income
- Distance to travel between the student's home and the institution, or a location for a placement or university visit
- The number of dependent children in the student's household
- The requirements of their study programme
- Whether the student has additional responsibilities that may mean they need extra help

There is no set limit for the amount of discretionary bursary that can be awarded to students. We will base all decisions around which students receive a discretionary bursary, and how much bursary they receive, on each student's individual circumstances and their actual financial need.

We will review the student's eligibility position each academic year. Students will only continue to receive a discretionary bursary if they continue to satisfy the criteria.

A small amount of money will be available to help students who encounter serious financial problems in the course of their studies because financial circumstances change. This will be especially relevant if financial concerns may prevent a student from completing the course or if help is needed to ensure future educational aims are supported.

Applications for additional help will be considered on an individual basis, and depend upon available funds. Please contact the Assistant Principal, Sixth Form for more details.

6.7 Evidence

All applications for 16 to 19 bursaries must be supported by appropriate evidence. Examples of acceptable evidence we may request are:

- P60, Week 52 payslip or 6 months' payslips
- Benefits entitlement award letter for Universal Credit, Working Tax Credit or any other benefits relating to household income
- Written confirmation of a student's current or previous looked-after status from the relevant local authority; and/or
- Written confirmation of a benefit award or tax credit notice, in the name of the student (for either bursary) or the parent (for the discretionary bursary)

7. Application and payment process

7.1 Applications

Applications should ideally be submitted no later than **Friday 29th September 2023** to allow enough time for our academy to assess the overall level of demand and make discretionary awards on a fair basis. This date will be clearly stated on the application form.

However, we acknowledge that students' circumstances may change and therefore the application process will remain open for the whole academy year.

Upon receipt of application a financial needs interview will take place to assess the student's level of financial need and what support they need to remain in education and participate in their programme of study.

Applicants will be notified in writing (either via email or via letter) whether their application has been successful, together with the amount of funding awarded. If a student wishes to appeal the outcome of their application for a bursary, they must follow the academy's complaints procedure.

7.2 Payment process

Payments are made using the following process:

The academy will either purchase the items agreed with the student at their financial needs interview, or reimburse the cost of items on presentation of receipts. Payment will be made directly into the student's bank account via BACS. If the cost of items exceeds the allocation agreed at the financial needs interview, the academy has the right not to fund the additional cost.

Higher cost items of equipment related to the student's course of study may be provided on loan basis for the duration of the student's programme of study. The student will be expected to return the items loaned in good working order when they leave the academy at the end of their studies. A separate loan agreement will be drawn up detailing the terms of the loan.

Bursary payments will be linked to attendance and behaviour as detailed in the Magna Academy code of conduct. If these conditions are not met the Academy reserves the right to withdraw or suspend Bursary payments. All students in receipt of a Bursary must meet weekly punctuality and attendance requirements.

7.3 Conditions for the receipt of bursary payments

Payments of the bursary are conditional on students meeting the following conditions in relation to their standards of attendance and behaviour:

- Attendance above 95% [subject to exceptional circumstances]
- Complying fully with the academies' pupil code of conduct

All students are required to sign a declaration confirming that they agree to these conditions.

Students who fail to meet these conditions may have their payment withheld, but we will always take students' individual circumstances into consideration. This includes considering the impact on attendance that might be caused by illness, caring responsibilities or other exceptional circumstances.

We will stop payments where students have been absent for a period of 4 continuous weeks or more (excluding holidays) and where students have decided to withdraw from a study programme.

We reserve the right to take back money from students where it is not spent for the reasons it was awarded.

We will consider the impact of such an action on the individual student before taking a final decision to do so, and any decision will be confirmed to the student in writing.

7.3 Appeals process

Students have the right to appeal a decision. Students, or their parent/guardian, will be required to put any appeal in writing within 21 days of receiving confirmation of an award or a rejection.

- The letter should set out the reasons for the appeal, which must prove that the student has been wrongly assessed as falling outside the eligibility criteria, plus any further evidence to support the Appeal. It should be addressed to Assistant Principal Sixth Form.
- The decision of the Appeals panel is final and will be given in writing within 14 days of the decision.
- The Appeals panel will consist of a member of the Post 16 Team and a member of the Senior Leadership Team. The Appeals panel meeting will be clerked by a member of the school's administrative/finance team.

Commitment:

- The written appeals process will be published to students and made available to students.
- The appeals process will be reviewed annually by the Academy's principal.
- The Director of Business will keep records of all appeals and the subsequent decisions and will manage internal appeals.
- Appeals will be considered by at least three people, at least one of whom has not been involved in the decision to withhold payment.
- The student making the appeal should be supported in the presentation of their case by a parent/guardian/friend.
- The Academy will keep a written record of all appeals.
- The written record will include the outcome of the appeal and include clear reasons for that outcome. A copy will be sent to the student within five working days.
- The student will be able to gain access to the data that the decision has been based on.
- The Academy will inform the Director of Business of the outcome of the appeal and adjust data as necessary.

8. Change in circumstances

If there are changes in circumstances which may affect eligibility for a bursary, applicants and/or parents/carers must notify the academy without delay.

9. Record keeping

Any paperwork and documents we retain for audit purposes (for example, copies of application forms, household income evidence and any agreements signed by students) will be kept securely in line with our data protection policy, privacy notices and record retention schedule. Copies of these policies can be found on the academies' websites.

10. Monitoring arrangements

This policy will be reviewed by the principal every 12 months. At every review, the policy will be approved by the Director of Finance.