



Inscape House School

16-19 Bursary Fund Policy

7th June 2021

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Statement of intent

At Inscape House School, we are committed to closing the attainment gap between students from disadvantaged and more advantaged backgrounds, and ensuring that every young person participates in, and benefits from, a place in 16-19 education and training.

We are dedicated to:

- Distributing 16-19 bursaries via a fair and equal process that is transparent, accountable and easily understood.
- Ensuring that information regarding the application, award and administration of 16-19 bursaries is publicly available via the school website and is also available through contacting the School Business Manager.
- Widening access to, and participation in, 16-19 education and training.
- Monitoring and reviewing our policies to ensure effectiveness.
- Setting high targets and objectives to develop a culture of continuous improvement.
- Ensuring adequate resources are available to implement policies, as much as is reasonably practicable.
- Sharing and acquiring best practice through partnerships with other settings.

Signed by:

_____ Headteacher Date: _____

_____ Chair of governors Date: _____

1. Legal framework

- 1.1. This policy has due regard to all relevant legislation and statutory guidance including, but not limited to, the following:
 - ESFA (2020) '16 to 19 bursary fund guide 2020 to 2021 academic year'
 - The Equality Act (2010)
- 1.2. This policy will be implemented in conjunction with the following policies:
 - Complaints & Compliments about the Together Trust Policy
 - Attendance Policy
 - PBS Policy

2. The setting's responsibilities

- 2.1. The setting will be responsible for setting eligibility criteria for students at the institution.
- 2.2. The setting will set conditions for receiving the bursary, such as regular attendance.
- 2.3. Arrangements for applying for bursaries will be straightforward and confidential.
- 2.4. The needs of each student who applies for the bursary will be assessed by the setting and evidence will be obtained to support each application.
- 2.5. The setting will claim vulnerable bursaries from the Student Bursary Support Service (SBSS) for each eligible student.
- 2.6. Records will be kept by the setting of all assessments and payments.
- 2.7. The application process will maintain confidentiality.
- 2.8. The setting will make this policy available early enough for students to be able to use the information when deciding which post-16 setting to attend.
- 2.9. The setting will comply with the requirements of the Equality Act (2010) when setting its criteria and will not discriminate against students because of their protected characteristics.
- 2.10. The setting will inform the ESFA of the total amount of any unspent funds (not previously reported) from any year up to and including the 2018/2019 academic year, emailing enquiries to enquiries.esfa@education.gov.uk no later than 31 March each year. Getting this info from finance and will report unspent funds
- 2.11. If applicable. the setting will ensure it completes the new Individualised Learner Record (ILR) or census fields to provide data on the number of students participating in extended work placements.

3. Raising awareness and take-up of the 16-19 bursary fund

- 3.1. To raise awareness of the bursary, the setting will employ different marketing activities, including the following:
 - Posting information about the bursary on the school website and in the prospectus, as well as on posters around the setting
 - Distributing information to Year 11 pupils
 - Providing new students with information about the bursary which directs them to the setting's website
 - Providing further information, such as the application form and details of the bursary, following enrolment for all new entrants to the setting as well as a text message and email about the bursary during the Autumn term of the academic year
 - Providing teachers with information to inform discussions between teachers and students
 - Working with social workers, who help the most disadvantaged students, to identify those who may be eligible for vulnerable groups
 - Sending text messages throughout the year to inform students' parents of the financial support available – in the Summer term, text messages are sent to inform students' parents that the application form can be downloaded and completed to check eligibility
- 3.2. To identify students who may be eligible for vulnerable groups, the setting will work with the LA, LAC education services and care leaver services to help and encourage students to apply for a bursary.
- 3.3. The setting will work with key stakeholders to identify eligible students for vulnerable groups
- 3.4. The setting will use their MIS to establish whether students were in receipt of the pupil premium in Year 11, which may indicate whether they are eligible for a discretionary bursary.
- 3.5. The setting will ensure that, in any marketing materials and the application form, procedures for how the institution maintains confidentiality are outlined to encourage more students to apply for the bursary.

4. Bursary fund statement

- 4.1. A bursary fund statement will be published every January on the school website.
- 4.2. The bursary fund statement will outline the following:
 - How the setting will use its funding

- The eligibility criteria for the bursary
- The type of support offered through the bursary, e.g. with transport, books and equipment
- Whether the bursary fund contributes to other costs, e.g. attending university open days and interviews
- A statement explaining that the support available to students is from the bursary fund

5. Eligibility

- 5.1. Students who are aged 16 or over and under 19 years old on 31 August before the academic year in question may qualify for bursaries for that academic year.
- 5.2. Where a student turns 19 during their programme of study, they will continue to receive the bursary up until the end of the academic year in which they turn 19, or until the end of the programme of study, whichever is sooner.
- 5.3. Students aged 19 or over will also be eligible to receive a bursary from the 16-19 Bursary Fund as they have an EHC Plan.
- 5.4. Students aged 19 or over will not be eligible for bursaries for vulnerable groups.
- 5.5. The setting will only pay bursaries to students aged 16 or over, unless in exceptional circumstances, e.g. where a student is following an accelerated study programme. The setting will use its discretion to decide whether a student under the age of 16 is eligible – this is explained further in [section 7](#).
- 5.6. Students can apply more than once if their circumstances change. In this case, they will be reassessed, including a one-to-one interview to determine if there are any exceptional circumstances to consider.
- 5.7. Most students who receive a bursary will get a tailored award from the discretionary bursary. Students in need of more support can apply for a vulnerable bursary.
- 5.8. Students must be participating in provision that is subject to inspection by a public body which assesses quality, e.g. Ofsted. The provision must also be either:
 - Funded directly by the ESFA or by the ESFA via an LA
 - Funded or co-financed by the European Social Fund
 - Otherwise publicly funded and leading up to a qualification (up to and including level 3) accredited by Ofqual or on the ESFA list of qualifications approved for funding 14-19.
 - A 16-19 traineeship programme.

6. Young offenders

6.1. Young offenders can apply for a bursary if they:

- Are serving a non-custodial sentence.
- Have been released early from a custodial sentence, except on temporary license.
- Have been remanded to a non-secure institution.

6.2. Young offenders cannot apply for a bursary if they:

- Are serving a custodial sentence.
- Have been released from a custodial sentence on temporary license.
- Have been remanded to a secure institution.

6.3. As with all bursaries, the setting will provide in-kind support to young offenders rather than cash payments wherever possible.

7. Discretionary bursaries

7.1. The setting will ensure that discretionary funding is allocated to the students who are most in need of financial support.

7.2. [The setting's eligibility criteria for receiving a discretionary bursary will include:

- Students who are completing a course in which specialist equipment and clothes are required, including industry placements.
- Students living in a low-income household (clarified in [7.3](#)).
- Students who are from a single parent family or have one or more dependent siblings in their family.
- Students who have additional responsibilities, such as being a young carer or parent.
- Students who travel greater than eight miles to the institution and do not have local authority transport provided for them.

7.3. Discretionary bursaries may be awarded for students in low-income households. The setting will use household income, in some way, to help establish the amount of support awarded to a student, if possible.

7.4. The amount awarded will be dependent on the amount of income – this will be allocated on different levels, as follows:

- **L1 discretionary bursary:** total income is less than, or equal to, £16,190
- **L2 discretionary bursary:** total income is more than £16,190, but is less than, or equal to, £20,817
- **L3 discretionary bursary:** total income is more than £20,817, but is less than, or equal to, £25,521

- 7.5. Students who apply will be assessed individually. This assessment will be documented and evidence to support the claims will be obtained and retained for auditing purposes.
- 7.6. The assessment will be based on a student's financial needs and the setting will consider any unearned income, such as shares or investments, savings, and rental income.
- 7.7. The setting will not make blanket or flat rate payments to all students or students in the income bands outlined in [7.4](#) without considering the actual needs of each student.
- 7.8. The setting will use in-kind payments over cash payments for discretionary bursaries wherever possible.
- 7.9. The setting will manage the discretionary bursary to keep payments within budget.
- 7.10. The setting may decide to retain a small emergency fund from its allocation to support students who face exceptional circumstances throughout the year.

8. Vulnerable bursaries

- 8.1. The setting's eligibility criteria for receiving a vulnerable bursary will include students who are:
 - LAC.
 - Previously LAC (PLAC).
- 8.2. Students who are in one or more of these categories can apply for a vulnerable bursary of up to £1,200.
- 8.3. Where a vulnerable student is on a course lasting 30 weeks or more and is participating full-time, they will be eligible to receive £1,200.
- 8.4. The setting may pay a student in a vulnerable group more than £1,200 if it believes the student needs extra help to remain in education. Where a vulnerable student is on a part-time course, the setting can make a reduction based on an hourly or daily rate.
- 8.5. The setting will only pay students the amount they need to access education, based on individual assessment. Students will not automatically receive £1,200 if they do not need the full amount.
- 8.6. Proof will be needed to evidence that a student is eligible for the bursary, for example:
 - **LAC or PLAC:** written confirmation, such as a letter or an email, of current or previous LAC status from the relevant LA (the LA that looks after them or provides their leaving care services)

- 8.7. The setting will only submit a funding claim to the SBSS once sufficient evidence has been provided and the setting has confirmed that the student needs financial support to participate.
- 8.8. The institution will be responsible for assessing whether students are eligible to receive a vulnerable bursary.
- 8.9. The institution may decide that, although a student may be eligible for a bursary, as they fall within one or more of the vulnerable groups, the bursary is not required as they do not have any financial need and do not need further support. If financial needs are already met and there are no other costs or they do not require the maximum award, the institution may decide not to allocate a bursary to the student – for example, where:
- A student attends specialist residential provision that covers their education costs in full.
 - A student undertakes a remote learning programme and there are no financial barriers to participation, e.g. no travel or food costs.
 - A student is in LA care and education costs are covered in full by the LA.
 - A student is financially supported by their partner.
- 8.10. Where the setting decides that a student is ineligible for funding in accordance with [8.10](#), the reasons for this will be explained to the student and/or the student's parents during a face-to-face meeting, followed by written confirmation.
- 8.11. If a student or the student's parents still want to claim a bursary for vulnerable groups, they must inform the setting. The setting will then consider the particular circumstances in each case and assess whether:
- No bursary should be awarded, as the student has no financial needs; or
 - A reduced bursary should be awarded, as the level of financial help needed is limited.
- 8.12. The setting will ensure its bursary application form is clear about the possibility of no or a reduced award.

9. Paying bursary funding to eligible students

- 9.1. The setting will aim to pay all funding in-kind, using cash payments only where necessary.
- 9.2. Payment in-kind may include, for example, travel passes, vouchers or credits for meals, or required books or equipment.
- 9.3. Where in-kind payments are given to students within vulnerable groups, the setting will explain the value of these payments to the student and how these have been deducted from the total £1,200.

- 9.4. In exceptional circumstances where payments are made to students, rather than in-kind, the funding will be paid by BACS transfer to the student's own bank account.
- 9.5. Payments will not be paid into another person's bank account unless exceptional circumstances mean that a student is unable to administer their own account. If a student cannot manage their own funds, the setting will consider who can manage the bursary on the student's behalf.
- 9.6. The setting has the right to determine how often payments are made – when doing so, the following will be considered:
 - The reason the bursary was awarded
 - The student's circumstances
 - Local arrangements
- 9.7. The setting has the right to insist that students only spend bursary payments on the support that has been identified as necessary to help them access education, e.g. to pay for lunches.
- 9.8. The setting will adhere to good practice guidelines to make regular payments to students on a weekly basis.
- 9.9. The setting will not pay bursaries to students in large or lump sums.
- 9.10. In order to decide how best to use individual students' bursary funding, the setting will employ the following procedures:
 - Every student who qualifies for a bursary is offered an interview with the School Business Manager and a key worker to decide the best way to allocate their support
 - Priority areas are addressed first, including travel to the setting, equipment costs and support with studies
 - Students are allocated a higher amount of funding at the beginning of their course to address the priority areas
 - A percentage of the funding is kept back as a hardship fund to respond to any emergencies that may arise during the year – the total amount held is discussed with the student during the initial interview
 - A member of the Post 16 team meet with individual students on a monthly basis to help them with budgeting
- 9.11. If students or their parents have any queries about payments, they should contact the School Business Manager at sam.ofori@togethertrust.org.uk or 0161 2834750.
- 9.12. The setting may use up to five percent of its allocation from the ESFA for administrative costs.

10. Conditions for receiving bursary funding

- 10.1. Receipt of a vulnerable or discretionary bursary will be conditional on the student meeting the agreed standards set by the institution.
- 10.2. The conditions of payment will be clear and accessible to students, as well as being thoroughly explained as part of the induction process.
- 10.3. Evidence that the student has seen and agreed to the conditions will be kept for audit, such as an agreement signed by the student, in accordance with [12.3](#).
- 10.4. Students in receipt of bursaries must have 85 percent attendance at timetabled lessons, unless the absence is authorised.
- 10.5. Vacation breaks outside timetabled school holiday times are not permitted.
- 10.6. Students in receipt of bursaries will be expected to abide by the Behaviour Principles Written Statement.
- 10.7. Where there are concerns regarding a student's attendance or behaviour, the setting will discuss the issue with the student and consider individual exceptional circumstances before withholding any payments.
- 10.8. The setting will ensure that all parents and students are aware of the possible impact that attendance may have on payments, outlined in the application form.
- 10.9. The setting will stop payments where a student has been absent for a period of four consecutive weeks or more, excluding holidays or if there is evidence that the student doesn't intend to return.
- 10.10. The setting will stop payments where a student withdraws themselves from a study programme.
- 10.11. Money may be taken back from students if it has not been spent for the reasons it was awarded to them. Before doing so, the setting will always consider the impact of this on the student.
- 10.12. The setting may specify that students return any books and equipment purchased for them through the bursary, such as a laptop, at the end of their study programme for use by other students. This will be clearly communicated to students and their parents upon confirming eligibility for the bursary.
- 10.13. The setting will highlight to students and parents the impact of receipt of the 16-19 Bursary Fund on other benefits. This includes information that:
 - Receipt of bursary funding will not impact the receipt of other means-tested benefits paid to families, e.g. Income Support.
 - Receipt of Disability Living Allowance or Employment Support Allowance will mean parents can no longer receive certain benefits for that child, e.g. Child Benefit.

11. Recycling bursaries

- 11.1. The setting will be able to recycle unused funding for bursaries for vulnerable groups, e.g. if a student leaves early after only receiving part of their bursary (until 30 April 2021).
- 11.2. Where the setting has accrued funds as specified in [11.1](#), it will use these funds for another student, rather than claiming for the full £1,200, e.g. if a student left and £700 was unspent, the setting will only claim £500 towards another eligible student.
- 11.3. If the setting has enough funds to cover the costs of a full bursary (£1,200), it will submit a funding claim showing a value of zero to the SBSS and use the amount to fund the new student.
- 11.4. If the setting decides that a student is in one or more of the defined vulnerable groups, but does not have any actual financial need, it will submit a funding claim showing a zero amount.
- 11.5. The setting will be able to add any funding for bursaries for vulnerable groups it has claimed, but no longer needs, for eligible students for discretionary bursaries (from 1 May 2021). Funds will be allocated in this way on a case-by-case basis after assessing students' needs.
- 11.6. The setting can also carry forward any unspent funds to the next academic year – any carried funds will only be used to support students.
- 11.7. If the setting has no other students who are eligible for a bursary for vulnerable groups and funds have been claimed in error, it will contact the ESFA and arrange to return the funds.

12. Student declarations

- 12.1. Students and/or their parents will sign a declaration when they apply for either a vulnerable or discretionary bursary, confirming that any evidence given in support of the application is correct.
- 12.2. By signing the declaration, the student and their parents are agreeing to all the conditions and eligibility criteria.
- 12.3. The setting will retain copies of the declaration and supporting documentation for six years – this includes:

For vulnerable groups:

- A copy of the funding claim sent to SBSS.
- Evidence showing that the student is eligible, as outlined in [8.8](#).
- Evidence of payments received from the SBSS, e.g. bank statements.
- A copy of the student's individual assessment of actual financial need.

- Evidence of payments made to the students.

For discretionary bursaries:

- Evidence used to assess eligibility, as outlined in [7.2](#).
- A copy of the student's individual assessment of actual financial need.
- Receipts for purchases made, e.g. bus pass, lunch receipts or book receipts.

13. Managing applications

- 13.1. The setting will use its own application form for the bursary fund.
- 13.2. All applications for the 16-19 bursary will be submitted by 31 July of each year wherever possible, to allow the setting to correctly and fairly assess overall demand and distribute discretionary awards. The setting will not, however, implement a cut-off date for applications, in recognition that some needs may arise throughout the academic year.
- 13.3. The date for applications to be submitted will be outlined in the bursary fund statement, the bursary application form and any marketing materials.
- 13.4. Application forms and marketing materials will outline that students who meet the criteria for bursaries for vulnerable groups are not automatically entitled to receive them, e.g. if they do not have any financial needs or these needs are covered by alternative means.

14. Quality assurance

- 14.1. The setting uses an [eligibility checklist](#) to confirm which documents have been provided for each student, as outlined in [section 12](#) – these relate to the following:
 - The application process
 - The decision to award the specified amount of bursary
 - The funds that have been issued to the student
- 14.2. The setting maintains written records of the following:
 - The number of applications received
 - The value of all bursaries awarded
 - The purpose of all bursaries awarded
 - Which applications qualified for the bursary and which did not
 - Brief descriptions of the institution's justification for any decision to award a bursary or not
- 14.3. The setting retains copies of any documents the student has signed to give formal agreement to their conditions for payment, as well as any others mentioned in this section, for six years.

15. Fraud

- 15.1. The setting will be responsible for investigating any suspected instances of fraud relating to bursary fund applications.
- 15.2. If evidence comes to light that supplied information is misleading or fraudulent, the setting will stop any further payments and will attempt to recover any payments already provided to the student.
- 15.3. Where significant fraud is identified, the setting will report this to the ESFA. Significant fraud includes the following:
 - The amount of money is in excess of £1,200
 - The particulars of the fraud are novel, unusual, systematic or complex
 - There is likely to be great public interest due to the nature of the fraud or the people involved
- 15.4. The matter may also be referred to the police, with the possibility of the student and/or their parents facing prosecution.

16. Conditions for using the bursary

- 16.1. The bursary fund will not be used by the setting for any reasons which would give them a competitive advantage over other settings, such as:
 - Enrolment or administration fees imposed by the setting.
 - Fees for access to facilities in the setting.
 - Block subsidy of the canteen.
 - Block subsidy of transport.
 - Block provision of equipment, material or books.
 - Bonus payments to reward attendance or achievement.
- 16.2. Block payments to students for attendance, irrespective of their actual financial need, will not be paid.
- 16.3. The bursary fund will only be used for supporting students who have a genuine financial difficulty which might prevent them from continuing in education, rather than acting as an incentive for attendance.

17. Complaints and appeals

- 17.1. All complaints and appeals must be made in writing in accordance with the Complaints and Compliments Policy.

- 17.2. If the complaint or appeal concerns operational processes or customer service for a vulnerable bursary funding claim, the SBSS will deal with the case. If the case is not resolved following this, it will be passed to ESFA.
- 17.3. The setting will act as a first point of contact for students who have complaints and will support students as much as possible throughout the complaints procedure.
- 17.4. Complaints made regarding the setting and the setting's provision of support will be dealt with in accordance with the procedure set out in the Complaints and Compliments Procedures Policy.

18. Monitoring and review

- 18.1. This policy will be reviewed every three years by the headteacher. The next scheduled review date is May 2024.
- 18.2. The setting will ensure that this policy is implemented correctly and appropriately at all times.
- 18.3. The setting will communicate any changes to this policy to all staff and relevant stakeholders.