



**16 - 19**  
**Bursary Fund Policy**

<b>FREQUENCY OF REVIEW:</b>	<b>Annually</b>
<b>RATIFICATION:</b>	<b>Summer Term 2018</b>
<b>APPROVED BY:</b>	<b>Oldbury Wells School Local Governing Body</b>
<b>DATE OF NEXT REVIEW:</b>	<b>Summer Term 2019 unless there is a material change</b>
<b>AUTHOR:</b>	<b>Director of Finance and Business Head of Sixth Form</b>

## **What is the 16-19 Bursary Fund?**

A key priority for the Government is to close the gap in attainment between those from less well-off and more affluent backgrounds, and to ensure every young person participates in and benefits from a place in 16 to 19 education or training.

The fund is made available from the government through its funding body, the Education and Skills Funding Agency (ESFA), to provide assistance to students whose access to, or completion of, education is inhibited by financial constraints or barriers.

Oldbury Wells School will determine the eligibility criteria for Discretionary Bursaries, and the frequency of and conditions for payments for all awards. The 16 - 19 Bursary will only be awarded to a student that is eligible and facing genuine financial barriers to participating.

## **Free School Meals**

Due to Government changes, Shropshire Council no longer administer free school meal allocations for Sixth Forms. These allocations are now administered by individual Sixth Forms through their Bursary Application process.

## **Who is eligible to apply for 16-19 Bursary Funding?**

To be eligible to receive a 16 – 19 Bursary in the 2018-2019 academic year, the student must be aged 16 or over and under 19 on 31<sup>st</sup> August 2018.

Students must also satisfy the residency criteria set out in the EFA Funding Guidance. (*A person on 1<sup>st</sup> September who is settled in the UK, and has been ordinarily resident in the UK and Islands for three years preceding the 1<sup>st</sup> September*). If you are in any doubt, please speak with the Sixth Form Administrator.

Students should be participating in provision that is subject to inspection by a public body that assures quality and funded within the relevant guidelines. (*Attendance at Oldbury Wells School meets the criteria.*)

## **Withdrawal of Bursary**

By way of example, in the following range of circumstances the Bursary Awards Panel (see page 3) would consider withdrawing Bursary payment:

- Unauthorised absence
- Serious failure to progress with courses / studies

In the event that one of these circumstances arose, the student would be notified in writing, by the Bursary Awards Panel, that withdrawal was being considered and steps recommended to attempt to rectify the situation.

## **Bursary Fund Levels**

### **Guaranteed Bursary**

Students in the following defined groups will be eligible for a Bursary of £1200 a year (if they are participating on a study programme that lasts for 30 weeks or more: a pro-rata amount is paid to students on study programmes of less than 30 weeks).

The defined 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 upon them and living with them, such as a child or a 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.

This would be paid in six instalments of £200 at the start of each half-term by BACS transfer directly into the student account. Payments will be subject to review by the Bursary Awards Panel

An application form is available, from the Sixth Form Office, for students who believe they are eligible for a Guaranteed Bursary.

### **Discretionary Bursary (Level One)**

Students who have a total household income of £16,190 or less can apply for a Full Discretionary Bursary, Level One.

The Level One also covers free school meal allocations, applications for which must be applied for through the bursary process.

Household income can be evidenced by:

- Receipt of proof of parental income (P60) and proof of means tested benefits,
- Tax Credit Award Notice
- Evidence of self-employment income.

(Further evidence / clarification of household income may also be requested).

All evidence of household income will be dealt with in strict confidence.

If eligible for a Bursary contribution towards school meals, an agreement will be made with the school canteen using the cashless catering system. No money will be paid directly to students.

Where home / school transport costs are to be met by the Discretionary Bursary, payments will be made direct to the transport company.

Where appropriate, payments may be transferred, on an agreed date, to the student's bank account via BACS. These payments will be made in arrears. There may be delays in some cases if there is any query regarding attendance.

**The sum awarded to eligible students will be subject to the number and type of applications received and the courses undertaken.**

Students will be informed of any non-payment in writing. However, students should check their payments regularly and, in the case of non-payment, should contact the Sixth Form Administrator for clarification.

Payments will be subject to review by the Bursary Awards Panel. An application form is available from, the Sixth Form Office, for students who believe they are eligible for a Level One Bursary.

## **Discretionary Bursary (Level Two)**

Students who have a total household income of more than £16,190 but less than £20,000 can apply for a Partial Discretionary Bursary, Level Two. Household income can be evidenced by:

- Receipt of proof of parental income (P60) and proof of means tested benefits,
- Tax Credit Award Notice
- Evidence of self-employment income.

(Further evidence / clarification of household income may also be requested).

All evidence of household income will be dealt with in strict confidence.

If eligible for a Bursary contribution towards school meals, an agreement will be made with the school canteen using the cashless catering system. No money will be paid directly to students.

Where home / school transport costs are to be met by the Discretionary Bursary, payments will be made direct to the transport company.

Where appropriate, payments may be transferred, on an agreed date, to the student's bank account via BACS. These payments will be made in arrears. There may be delays in some cases if there is any query regarding attendance.

**The sum awarded to eligible students will be subject to the number and type of applications received and the courses undertaken.**

Students will be informed of any non-payment in writing. However, students should check their payments regularly and, in the case of non-payment, they should contact the Sixth Form Administrator for clarification.

Payments will be subject to review by the Bursary Awards Panel.

An application form is available from, the Sixth Form Office, for students who believe they are eligible for a Level Two Bursary.

## **Discretionary Bursary (Level Three)**

Students who have a total household income of between £20,000 and £25,000 can apply for a limited Discretionary Bursary, Level Three, as a contribution towards specific educational needs. These include:

- Costs of transport
- Meals in school
- Books and equipment
- Educational trips

Household income can be evidenced by:

- Receipt of proof of parental income (P60) and proof of means tested benefits
- Tax Credit Award Notice
- Evidence of self-employment income.

(Further evidence/clarification of household income may also be requested)

All evidence of household income will be dealt with in strict confidence.

No student will receive more than £200 per year.

Payments will be made only on receipt of a receipted claim for approved purchases. Alternatively the Sixth Form will arrange purchases direct on behalf of the student subject to advance agreement on what is required.

On receipt of the award, students will be required to agree, in writing, that they will apply the funding for the intended purposes. The school reserves the right to withhold or reduce a Bursary where payments no longer support education or attendance.

Payments will be subject to review by the Bursary Awards Panel.

An application form is available, from the Sixth Form Office, for students who believe they are eligible for a Level Three Bursary.

### **Exceptional Circumstances**

If a student believes they have exceptional circumstances that warrant financial support outside the criteria set in this policy document, they should discuss this with the Sixth Form Administrator in the first instance, e.g. the student's family income falls just outside the bandings set, but the courses they are participating in have particularly high costs, e.g. for equipment or specialist clothing.

### **Contingency Fund**

Students who successfully apply for any of the above levels will also be able to access a small emergency fund for exceptional circumstances if they can show identifiable financial need. There will be an application form available from the Sixth Form Office where all requests will be dealt with in the strictest confidence.

### **Assessment**

The Bursary Awards Panel will assess each application with supporting documentation in the strictest confidence. Any student who believes they are eligible for any level of funding from the 16 - 19 Bursary Fund should complete an application form and hand it in to the Sixth Form Administrator as soon as possible after admission in September. The closing date for applications will be Friday 28<sup>th</sup> September 2018. A student in receipt of any level of Bursary must inform the Sixth Form Administrator of any changes to family circumstances that may affect the support during the academic year.

### **NOTE:**

*Applications will be accepted any time during the academic year and will be made pro rata from the date of application to the year-end date.*

### **Returning of books and equipment**

Books and equipment, including any ICT and uniform, purchased through the Bursary scheme must be returned to the Sixth Form at the end of the course in order that they can be re-used for the benefit of other students. Any exceptions must be agreed by the Head of Sixth Form.

### **The Bursary Awards Panel**

The Bursary Awards Panel will normally meet three times per year (October, January and May to consider and review applications). Additional meetings may be held as necessary.

The Bursary Awards Panel consists of:-

Mrs K Cook	Director of Finance and Business
Mrs A Bishell	Head of Sixth Form
Mr J White	Assistant Headteacher

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. The Panel will also meet to consider any cases where payments could be withdrawn and will recommend approaches taken in individual cases where temporary withdrawal may become necessary.

### **Criteria for Allocation**

The Bursary Awards Panel may consult with other members of staff to seek information about an applicant's circumstances, well-being, behaviour, progress and attendance. Any decision will rest with the Panel.

### **Application Procedure**

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

After the application has been received, the Sixth Form Administrator will log the application and organise a meeting of the Bursary Awards 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 for audit purposes.

The application forms will then be checked by the Sixth Form Administrator to see that the student is meeting the conditions identified in the school policy.

### **Payments**

Students are only eligible for payments if they are legitimately enrolled and attending as defined by the criteria. Students should ensure they have a bank account in their name through which to receive funds.

Payment for the **Guaranteed Bursary** will be made by BACS transfer to the student's own bank account on a half termly basis. Payments will not be paid into another person's account unless there are exceptional circumstances where the student is unable to administer their own account. 'In kind' Bursary payments may also be made, e.g. travel passes, meals, course materials; the value of which will be deducted from the total Bursary awarded.

Payment for the **Discretionary Bursary (Level One)** will be agreed on an individual basis. Discretionary Bursaries (Level One) will be paid within two weeks of the Bursary being agreed. Discretionary 'one off' payments will be made within 28 working days of the application being approved. Where direct payments are necessary, they will be made by BACS transfer into the student's own bank account or by cheque or cash (under £30 only).

Payment for the **Discretionary Bursary (Level Two)** will be agreed on an individual basis. Discretionary Bursaries (Level Two) will be paid within two weeks of the Bursary being agreed. Discretionary 'one off' payments will be made within 28 working days of the application being approved. Where direct payments are necessary, they will be made by BACS transfer into the student's own bank account or by cheque or cash (under £30 only).

Payment for the **Discretionary Bursary (Level Three)** will be agreed on an individual basis. It may be made 'in kind' (e.g. contribution towards a school coach pass or meals through the school kitchen) or Discretionary Bursaries (Level Three) will be paid within two weeks of the Bursary being agreed. Discretionary 'one off' payments will be made within 28 working days of the application being approved.

Where direct payments are necessary, they will be made by BACS transfer into the student's own bank account or by cheque or cash (under £30 only).

All application forms will be sent to the Director of Finance and Business.

All applications received will be considered by the Bursary Awards Panel that reserves the right to award funding as it sees appropriate. The decision made by the Bursary Awards Panel on the level of funding awarded is final. The Bridgnorth Area Schools' Trust (BAST) Audit Committee will receive and determine only upon any appeals where funding is refused.

## **Payment Appeals**

### **Guaranteed Bursary**

Eligibility – Students will have the right of appeal to the Bursary Awards Panel in all cases if it is felt the payment has been withheld without justification.

### **Discretionary Bursary (Level One)**

Eligibility – Parents, guardians and students will have the right of appeal to the Bursary Awards Panel in all cases if it is felt the application has been denied without justification.

Issues with Payments – As payments are made directly to the student concerned, it is therefore the student who must contact the school in case of difficulty and not the parent. Students will have the right of appeal in all cases if it is felt the payment has been withheld without justification.

### **Discretionary Bursary (Level Two)**

Eligibility – Parents, guardians and students will have the right of appeal to the Bursary Awards Panel in all cases if it is felt the application has been denied without justification.

Issues with Payments – As payments are made directly to the student concerned, it is therefore the student who must contact the school in case of difficulty and not the parent. Students will have the right of appeal in all cases if it is felt the payment has been withheld without justification.

### **Discretionary Bursary (Level Three)**

Eligibility – Parents, guardians and students will have the right of appeal to the Bursary Awards Panel in all cases if it is felt the payment has been withheld without justification.

Issues with Payments – As payments are made directly to the student concerned, it is therefore the student who must contact the school in case of difficulty and not the parent. Students will have the right of appeal in all cases if it is felt the payment has been withheld without justification.

## **Administration and Audit Requirements**

10% of the Bursary Fund allocation will be retained for emergencies until April of each year.

5% of the total Bursary Fund will be retained to assist with administration costs.

The School will retain all relevant documentation and evidence for audit purposes. The records will be stored securely for a period of 7 years after which all records will be confidentially destroyed.

## **Appeals Procedure**

The Bursary Awards Panel reserves the right to award funding as it sees appropriate. The decision made by the Bursary Awards Panel on the level of funding awarded is final. Applicants should be aware that funding available for Discretionary Bursaries (Levels 1, 2 and 3) is limited.

Students who consider that their claim has been inappropriately assessed can appeal, in writing, within 4 weeks of the Panel's decision. This will be passed on to the BAST Audit Committee to be reviewed. Additional evidence to support the appeal may be required. The claim will be reassessed and the student informed of the decision in writing within 10 days of the Committee meeting.

Students who consider that their claim has been inappropriately withdrawn can appeal, in writing, within 4 weeks of the Panel's decision. This will be passed on to the BAST Audit Committee to be reviewed. Additional evidence to support the appeal may be required. The claim will be reassessed and the student informed of the decision in writing within 10 days of the Committee meeting.

The BAST Audit Committee will receive and determine only upon any appeals where funding is refused. Appeals should be addressed to the Clerk of the Governing Body c/o Oldbury Wells School.

## **Confidentiality**

We will handle applications confidentiality and will make sure that students are not singled out (please talk to us if you are worried about this). Copies of information given in evidence to support applications will be retained by the school for audit purposes and will be kept confidentially.

## **Fraud**

If students and / or parents / carers provide false or incomplete information or we are not told about part of the household income that is relevant, the matter may be referred to the Department for Education or the Police. The student and parents / carers could face prosecution and the school will recover any payments for which the student is not eligible.

## **Individual Responsibilities**

### **Student**

- a) Students making applications undertake to provide accurate information and appropriate documentary evidence where needed.
- b) Students in receipt of an award should comply with school rules and regulations as detailed in their Sixth Form Contract and Fact File.
- c) Students must inform the school of changes in their financial circumstances.

### **Sixth Form Administrator**

- a) Oversees the administration of the fund.
- b) Assists the student to make an appropriate application.
- c) Ensures the form is completed appropriately and that documentary evidence is provided or confirmed where required.
- d) Ensures that reasons for the BAST Audit Committee's appeals decisions are accurately recorded.
- e) Notifies the student at the termly review dates as to whether attendance conditions are being met before making / withholding a payment.
- f) Acts as the first point of contact to receive any appeal.

- g) Liaises with the Director of Finance and Business to ensure timely payment of Bursary funds.
- h) Liaises with the Director of Finance and Business to ensure that audit requirements are met.
- i) Liaises with the Head of Sixth Form on ensuring students meet targets and objectives as per their Sixth Form Learning Agreement.
- j) Produces reports on administration of the fund for the Resources Committee.
- k) Ensures that the Bursary Fund is publicised in an appropriate manner.

### **Director of Finance and Business**

- a) Ensures funds are paid to students in accordance with the decisions of the Panel.
- b) Administers the cash-flow in accordance with audit and EFSA requirements.
- c) Liaises with the Sixth Form Administrator to ensure that audit requirements are met.

### **Bridgnorth Area Schools' Trust, Resources Committee**

Receives a termly report from the Sixth Form Administrator detailing the take-up against the criteria used and a financial analysis of the expenditure.

### **Contact Us**

We are happy to help and guide you through the 16–19 Bursary Fund Policy and if you have any questions or concerns please do get in touch;

Sixth Form Administrator	Mrs T Fyfe
Telephone	01746 765454 ext 212
Email	<a href="mailto:tracy.fyfe@oldburywells.com">tracy.fyfe@oldburywells.com</a>
Website	<a href="http://www.oldburywells.com">www.oldburywells.com</a>

### **Review of the Policy**

This Policy will be reviewed annually by the Oldbury Wells School Local Governing Body in accordance with recommendations from the school’s audit services and ESFA requirements.

### **Appendices**

1. Application form
2. Letter to students

The 16 – 19 Bursary Fund Policy has been adopted by the Governing Body of Oldbury Wells School

Signed \_\_\_\_\_  
Chair of Oldbury Wells Local Governing Body

Dated \_\_\_\_\_

Signed \_\_\_\_\_  
Headteacher

Dated \_\_\_\_\_

**Oldbury Wells School 16 – 19 Bursary Fund Application 2018 – 2019**

**Please read the Oldbury Wells School Bursary Fund Policy 2018 – 2019 before completing this form.** (Available on the Oldbury Wells School website or from the Sixth Form Office)

**Student Details**

Surname	
Forenames	
Address	
Postcode	
DOB	

**Guaranteed Bursary**

Identified vulnerable students eligible for £1200.00 bursary	<input type="checkbox"/>
I am a young person in care	
I am a young care leaver	
I am in receipt of Income Support or Universal Credit	
I am in receipt of both Disability Living Allowance (or Personal Independence Payments) and Employment Support Allowance (ESA) (or Universal Credit as a replacement to ESA)	

**Discretionary Bursary – Levels 1/2/3** – please tick which level of payment you are applying for:

**Level One - Discretionary Bursary**

<b>Level One</b> – Identified students eligible for a discretionary bursary <input type="checkbox"/>	
I am in receipt of Free School Meals	
My total household income is less than £16190.00	

Please briefly outline the nature of the expenses to be covered by the discretionary bursary funds. A separate form must be completed when making a request for Level One funds during the academic year and receipts for any items purchased must be attached for audit purposes. (Please see Mrs Fyfe for further information)

Transport requirements	
Meals in school	
Books and equipment	
Educational trips/University visits	

**Level Two - Discretionary Bursary**

<b>Level Two</b> – Identified students eligible for a discretionary bursary for specific educational purposes. <input type="checkbox"/>	
My total household income is more than £16190.00 but less than £20,000.00	

Please briefly outline the nature of the expenses to be covered by the discretionary bursary funds. A separate form must be completed when making a request for Level Two funds during the academic year and receipts for any items purchased must be attached for audit purposes. (Please see Mrs Fyfe for further information)

Transport requirements	
Meals in school	
Books and equipment	
Educational trips/University visits	

### **Level Three - Discretionary Bursary**

<b>Level Three</b> – Identified students eligible for a discretionary bursary for specific educational purposes. This will not exceed £200.00 per school year.		<input type="checkbox"/>
My total household income is more than £20,000.00 but less than £25,000.00		

Please briefly outline the nature of the expenses to be covered by the discretionary bursary funds. A separate form must be completed when making a request for Level Three funds during the academic year and receipts for any items purchased must be attached for audit purposes. *(Please see Mrs Fyfe for further information)*

Transport requirements	
Meals in school	
Books and equipment	
Educational trips/University visits	

### **Household Income** *(Required for Levels One, Two and Three applications)*

Please include all required original supporting documentation with this form. All evidence will be photocopied and dealt with in the strictest confidence. *(Please do not send any original documentation in the post. Students should bring all documentation straight to Mrs Fyfe, in the Sixth Form Office, who will photocopy and return as soon as possible).*

My <b>total</b> household income is:	£
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Please tick to indicate the supporting documents\* provided

Receipt of benefit	
P60 (tax year 2017 – 2018)	
Tax Credit Award (tax year 2017 – 2018) (All pages needed)	
Evidence of self-employment income (tax year 2017 – 2018)	

(\*please supply as much detail as possible)

**Bank Account Details** (Required for Levels One, Two and Three applications)

Where bursary payments are made to a bank account, they will only be made to the student's bank account. Payments may be made to a joint account, as long as the student is one of the account holders.

You **must** attach an original account statement, letter or form from your bank or building society that shows your name, account number, sort code, and home address. Mrs Fyfe will photocopy the documents and return the original documents. The photocopies will be held in a secure location.

Please complete the table below:

**Student Bank or Building Society Details**

Full name of account holder (this should be as it appears on your cash or debit card, or statement)	
Name of Bank or Building Society	
Branch address	
Sort Code	___ - ___ - ___
Account Number	

*Your account number may not be the same as the cash or debit card number; you can find it on a bank or building society statement. Most account numbers are 8 digits long. If you are unsure your bank or building society can advise you.*

**I/we confirm that the details provided to support this application for the 16 to 19 Bursary are true and accurate\*\*. I/we understand that the above named student must comply with the terms of the Oldbury Wells School 16-19 Bursary Fund Policy, and that funds may be withheld if they fail to do so. I/we understand that I/we must notify the Sixth Form Administrator immediately if there are any changes in financial circumstances to ensure that funding is paid at the correct level.**

**Signed** \_\_\_\_\_ **Date** \_\_\_\_\_  
(Student)

Please print name \_\_\_\_\_

**Signed** \_\_\_\_\_ **Date** \_\_\_\_\_  
(Parent/Guardian)

Please print name \_\_\_\_\_

**\*\*** Please note that giving false or incomplete information which leads to incorrect or overpayment may result in the stoppage of future payments and the recovery of funds that have already been paid. It may also result in a referral to the police with the possibility of the student/or their family facing prosecution

**This information was correct at time of print but may be subject to change.**

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<b>Sixth Form Use Only</b>			
Date Application Received		Supporting documentation provided, photocopied and returned	
Date Application Reviewed		Level of Bursary agreed	
Comments/Notes			

Ref: AKB/tdf

20 June 2018

**16-19 BURSARY FUND & FREE SCHOOL MEALS**

Dear Parents/Guardian/Student

To provide assistance to sixth form students whose access to, or completion of, education is inhibited by financial constraints or barriers we operate a Bursary Fund. The money for this is made available from the government through its funding body, the Education and Skills Funding Agency (ESFA).

The school has a duty to use this money to award the Guaranteed Bursary first, with any monies left being used for Discretionary Bursary Awards. You may be eligible for a bursary award if your household income is less than £25,000 per household.

The scheme is made up of two parts:

**Guaranteed Bursary**

The Guaranteed Bursary is for the most vulnerable young people aged 16 to 19, made up of;

- Children in care.
- Care leavers.
- Those children on income support in their own right.
- Disabled young people in receipt of Employment Support Allowance who are also in receipt of Disability Living Allowance.

This is designed to help those most in need, these students will be awarded a bursary of up to £1,200, which the school will administer throughout the year to assist these students with their transport and costs incurred by their course.

Other students who need financial support to help them stay in education may be able to apply for the Discretionary Bursary.

**Discretionary Bursary**

A discretionary bursary can be awarded to any student aged 16 to 19 who faces genuine financial barriers to staying on in education. It is designed to help with costs such as transport, food or equipment.

Continued over.....

**Headteacher**  
Mrs Sarah Godden BA MEd  
Oldbury Wells, Bridgnorth, Shropshire, WV16 5JD  
**E.** [head@oldburywells.com](mailto:head@oldburywells.com)  
**T.** 01746 765454 / 760505

Payments will be linked to attendance, achievement and behaviour. Discretionary Bursary payments will depend on personal circumstances, will be set by the school and will be paid in arrears.

### **Free School Meals (FSMs)**

Changes made by the government mean that our ESFA allocation now includes funding for free school meals. Therefore if you were eligible for FSMs last year, or believe you now qualify, you **must apply through our Sixth Form Bursary system** and not through Shropshire Council.

Should you wish to apply for FSMs or either of the Bursaries, there will be an application form available from the Sixth Form Office on GCSE results day and at the start of term. Alternatively a form may be requested from the Sixth Form office in person or via phone or email. In order to assess your eligibility for a bursary you will need to complete and return the form to school by 28 September 2018 along with the necessary financial documents listed. All applications will be assessed by the school and you will be advised of the outcome by the end of October.

### **Transport**

Please note that all bus passes must be applied and paid for by the student/parent in the usual manner. If your Bursary application is successful, and includes transport costs, the monies paid will be refunded.

A copy of our 16-19 Bursary Fund Policy is available upon request.

Should you have any further questions, we will be able to answer them in September.

Yours sincerely



Mrs A K Bishell  
Head of Sixth Form  
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**T:** 01746 765454  
**T Sixth Form:** 01746 760505

**Headteacher**  
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