

The Mercian Trust

16-19 Bursary Fund Policy 2022-23 (DRAFT)

Policy Owner	The Mercian Trust
Date Ratified by Trust Board	
Date to be Reviewed:	
Date Adopted	

Updates to Policy – August 2022

- Free School meals students no longer automatically qualify and will need to provide evidence of household income.
- In exceptional circumstances, on a case-by-case basis and at the discretion of the Headteacher, schools may provide one-off payments in-kind or reimbursements to students who may not fall precisely within the two defined bursary groups. Evidence of the student's eligibility, the individual assessment of their circumstances and their actual participation costs must be held for audit purposes.
- The 2022/23 government guidance for Bursary Funding allows schools to provide food support for a student considered to be in real need without gathering the supporting evidence that would normally be required.
- Vulnerable students will not automatically receive the maximum award and we will need to assess the actual amount of financial help required for the student to participate in education. Vulnerable students will not necessarily receive flat payments
- For students who are eligible for Free School Meals and the Bursary (based on the assessment of their household income) there is the chance to **opt out of Free School Meals**. The maximum possible amount that can be awarded to a Tier A student (eligible for both Free School Meals and the Bursary) is £1200 however normally we would allocate £500 of this to Free School Meals leaving £800 for incurred costs (travel, uniform, trips, books etc.). Some students do not use their Free School Meals and would prefer to have access to the full £1200 for incurred costs. If this is the case, students can opt out of free school meals on the bursary application and their entitlement will be removed on SIMs and from the school cafeteria.

1. Background

A key priority for the Government is to close the gap in attainment between those from less fortunate 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 Department for Education (DfE) established the 16-19 Bursary Fund in 2011. The aim of the Fund is to help 16 to 19 year olds continue in education, where they might struggle for financial reasons. It enables those students to access additional funds to support: learning; participation in activities to enrich their learning experience; and pursue applications to Higher Education. There are two types of 16-19 Bursaries:

- **Vulnerable Bursary** For young people in one of the defined vulnerable groups.
- **Discretionary Bursary** Awarded by the Trust to meet individual needs i.e. help with the cost of transport, meals, books and equipment.

2. Eligibility Criteria

For students to be eligible for the bursary fund, students must meet the age and residency criteria as listed below:

- Be aged over 16 and under 19 on 31st August 2022 or 19+ with an Education, Health and Care Plan (EHCP) or continuing on a course you started aged 16 to 18 (known as being a '19+ continuer')
 - Be enrolled on a full time course
 - Meet the ESFA's residency criteria as set out in the ESFA Funding Guidance
- ** Students aged 19 or over are not eligible for a Vulnerable Bursary.

3. Bursary Groups

This policy meets the requirements of the Education and Skills Funding Agency (ESFA)'s 16-19 Bursary Fund Guide 2022-23, providing pupils with the opportunity to benefit from the fund at different levels according to individual circumstances. There are two groups at whom the Trust Policy is directed:

➤ **Bursary Level 1 – Vulnerable Student Bursaries**

The Trust can approve up to £1,200 of bursary funding, depending on needs, to be awarded to students who are in one of the following 'vulnerable group' as defined by the EFSA:

- In Care or Care Leaver
- Receiving Income Support or Universal Credit in their own right
- Receiving Disability Living Allowance or Personal Independence Payment in their own right and Employment Support Allowance or Universal Credit in their own right

➤ **Bursary Level 2 – Discretionary Bursaries (household income below £25,000)**

This is based on the financial position of the student's family, and their needs to continue in education. To be eligible, the student's family household income must be **below £25,000** per annum, to include income from employment, pensions payments, jobseekers allowance, all tax credits including child tax credit and working tax credit but child benefit may be excluded.

In exceptional circumstances, on a case-by-case basis and at the discretion of the Headteacher, schools may provide one-off support in-kind or reimbursements to students who may not fall precisely within the two defined bursary groups.

4. How to Apply

Students are required to complete the online 16-19 Bursary Funding application form in the presence of their parent/guardian.

Details required:

- Student details
- For vulnerable bursary applications – confirmation of status and confirmation of income
- For discretionary bursary applications – confirmation of income
- Student Educational Needs
- Student bank details – in their own name
- Declarations

Important

- Students and their parent/guardian must take great care to ensure information provided to the Trust is true and complete. If information is found to be false or incomplete (i.e. undeclared income) we will request that the money awarded be repaid in full. Failure to repay the award may lead to police involvement / court action.
- The bank account details provided must be in the **student's own name.**

Following the completion of the bursary application, the relevant evidence must be emailed to the relevant contact for the students' school in order for the application to be assessed and processed. Please include the school and student's name in the title of any emails sent.

List of possible evidence:

- Letter from H M Revenue & Customs - Tax Credit Award for 2021/22 or 2022/23
- Current Benefit Letter from the Department for Work and Pensions (DWP)
- Proof of earnings from Employer - P60 for 2021/22
- Self-Assessment Tax Return (if self-employed) for 2021/22
- Universal Credit Monthly Award Notices for June, July and August 2022
- Confirmation letter from Local Authority of current or recent looked after status (vulnerable group)
- Other confirmation of income

Please [Click Here](#) for the online application form for all schools except Queen Mary's Grammar School. The link can also be found on the school websites.

Please email all supporting evidence to: Bursary@the.merciantrust.org ensuring that the email subject heading includes the students full name, school and year group.

For students at Queen Mary's Grammar School who wish to apply and provide supporting evidence please [Click Here](#) .

Important

- Please ensure that you complete the correct form for your school and that you use the correct email address for your evidence or your application may not be processed.
- All applications and evidence must be submitted by ***Friday 16th September 2022.** Late applications will be considered, but payments will not be backdated and processing may take considerably longer than for on-time applications. Successful applicants will be contacted directly to discuss their award payments.
- *This is not a hard deadline for Queen Mary's Grammar School. Students are encouraged to apply by this date but, as a new system is being trialed, later applications will still be considered.

5. Assessment Procedure

The distribution of the Discretionary Bursary fund will be dependent on the number of eligible students and the Trust reserve the right to retain 20% of the 16-19 Bursary amount provided. This is to accommodate changes in circumstance and ensure that requests for funding from students following such changes can be accommodated. 5% may also be retained for administration of the fund.

The awards listed below are the maximum possible awards which can be made subject to the numbers of students who are accepted and **are not guaranteed**. They will be determined according to family income and costs expected by the student.

Schools receive no government funding for Free School Meals students in years 12 and 13. We therefore allocate these costs to our bursary funding. This year £500 has been allocated from the Bursary fund to each Free School Meals student to cover the costs of their Free School Meals. The remaining bursary funds are then available to support students with specific needs to ensure they are not disadvantaged by remaining in education.

For students who are eligible for Free School Meals and the Bursary (based on the assessment of their household income) there is the chance to **opt out of Free School Meals**. The maximum possible amount that can be awarded to a Tier A student (eligible for both Free School Meals and the Bursary) is £1200 however, as previously mentioned, we would allocate £500 of this to Free School Meals leaving £800 for incurred costs (travel, uniform, trips, books etc.). Some students do not use their Free School Meals and would prefer to have access to the full £1200 for incurred costs. If this is the case, students can opt out of free school meals on the bursary application and their entitlement will be removed on SIMs and from the school cafeteria.

The amounts awarded to each student eligible for a level 2 bursary will also be determined by the total number of students who apply successfully before the deadline. The Bursary fund is a finite amount and, in cases where there are high numbers of eligible students, each student may receive less than the maximum. The Trust will seek to ensure total payments do not exceed funding provided by the ESFA.

Tier	Eligibility Criteria for Level 2 Bursaries	Maximum Bursary award for whole year
A1	Students eligible for Free School Meals, with family income below £25,000, who wish to continue receiving Free School Meals	£800 for incurred costs £500 allocated to FSM
A2	Students eligible for Free School Meals, with family income below £25,000 who opt out of receiving Free School Meals	£1,200 for incurred costs
B	Students with family income below £25,000, not on Free School Meals	£800 for incurred costs

Important

- For all Tiers - evidence of household income for all parent(s) is required to support the application.
- If you are eligible for Free School Meals but your family income is above the threshold of £25,000 you will not be eligible for the bursary.
- You can find out if you are entitled to free school meals by visiting the Walsall Council website: https://go.walsall.gov.uk/free_school_meals.

Student Educational Needs

As part of the online bursary application, students are required to indicate how much they may need to spend on items to help them stay in education.

The list below is an example of the costs that students may receive bursary support for:

- Public transport to and from school – If a student indicates in their application form that they take public transport to school, some of their bursary will be allocated specifically to termly payments for travel costs as follows:
 - In the first term a one off payment of £100 will be provided to cover the cost of that terms pass retrospectively
 - Thereafter, bus passes will be purchased for these students by the school.
- It will not be possible to claim for travel costs using a claim form, except those relating to university visits.
- School uniform / sports kit – Each eligible student will automatically receive a one off payment of up to £150 to cover their uniform costs for the year. It will not be possible to claim for additional uniform costs using a claim form.
- Sports uniform at Queen Mary's Grammar School will be classed as specialist sport equipment and will be reimbursed.
- Trips and UK education visits - we may fund up to **£100 for overseas trips**
- University visits / interviews
- Curriculum materials / equipment – books, revision guides, consumables, etc.
- Examination fees including re-sit if applicable
- Music tuition fees – for tuition organised by the school.
- School meals – Students who opt out of FSM or who were not eligible for FSM will have the option to request that some of their bursary be allocated to the school canteen system.
- Any laptops required will be purchased direct by the Trust and may cost up to £300. Students will need to tick the box on the application form to confirm that they require a laptop. No additional laptop claims will be accepted beyond this.

Awards will be made based on the students financial needs as detailed in the application form.

6. Payments

Vulnerable Bursary Payments

In previous years vulnerable students received flat payments at regular intervals, this will no longer be the case.

The guidance encourages Schools to pay Bursaries in-kind rather than cash as far as possible. For example, by providing bus passes, vouchers, books and equipment and deducting the value from the total amount awarded to the student. Where necessary, payments can be made by BACs for specific items and receipts can be provided after the item has then been purchased.

Vulnerable and Discretionary Bursary Payments

Reimbursements: In cases where students prefer to pay up-front cost of items that they require, the School will reimburse them upon completion of a claim form and provision of receipts.

Support in-kind: In cases where students are unable to pay up-front costs of items, the school will order items on their behalf such items include but are not limited to laptops, books and printers.

Payments in advance: In cases where students are unable to pay up-front cost of items and support in kind is not feasible, the school can make a payment in advance to them by BACs. The payment in advance is only to be spent on that specific item and the student must provide the receipt after they have made the purchase. Students will be unable to make further claims until receipts for previous ones have been provided. *Please note that reimbursements and support in-kind are the best method of payment and payments in advance should only be made in exceptional circumstances.*

- a) Students are required to complete the online 16-19 Bursary Claim Form which can be found here: <https://forms.office.com/r/4TWnYj9X9f>
- b) Students will be guided on the form to state whether they are requesting support in kind, a payment in advance (receipts to be provided later) or a reimbursement (receipts to be provided immediately).
- c) Once the online form is completed, supporting receipts must be emailed to the correct address for your school:

School	Email Address for Receipts	Key contact in School
Aldridge School	aldbursary@the.merciantrust.org	Ruth Elton
Queen Mary's High School	qhsbursary@the.merciantrust.org	Jo York
Shire Oak Academy	soabursary@the.merciantrust.org	Gavin Jones
The Ladder School	tlsbursary@the.merciantrust.org	Ruth Bryant
Walsall Studio School	wssbursary@the.merciantrust.org	Paige Brooks

- d) Receipts for payments in advance will need to be provided once the purchase has been made but before another claim is made. Please include your full name, school and form group in the email so that your receipts and form(s) can be matched.
- e) In certain instances, such as in the case of school trips, the school will make payments directly on behalf of the students.
- f) Payments and reimbursements are issued to students five times per year*; claim forms and receipts must be submitted by the dates below for payments to be processed.

	Claims Form and Receipts Due Dates
1	Friday 21 st October 2022
2	Friday 9 th December 2022
3	Friday 3 rd February 2023
4	Friday 24 th March 2023
5	Friday 19 th May 2023

Important

- It is imperative that all claims and receipts are emailed to the correct email address within the deadlines above in order for payments to be made. Any claims made **after** the claim dates will be rolled over to the next claim period.
- Claims for reimbursements may only be made with receipts.
- Full payment of the bursary to the student is dependent on the delivery of the **Conditions** listed in the next section.
- Receipts for payments in advance must be sent in before any further claims can be made.
- *For students at Queen Mary's Grammar School a new system is being trialed and payments and reimbursements will be made on a rolling basis.

7. Conditions

Students must meet the following criteria in order to receive their bursaries:

- Have a target attendance of **95%**. Students with below 95% attendance are at risk of their bursary payments being withheld. Students with below 90% attendance will receive no bursary payments. *(Some allowance may be made for students for whom this is not possible, for example those with chronic or ongoing illness or other special circumstances that the school has previously been made aware of.)*
- Be punctual to all lessons.
- Demonstrate good behaviour.
- All work required by teaching staff will be submitted to the deadline set.

8. Complaints or Appeals

Any student or parent who is unhappy with the handling of application for bursary funding or wish to make an appeal should follow The Mercian Trust's complaints procedure. It is important to note that appeals for Levels 1 & 2 bursaries on the grounds of income levels alone are unlikely to result in a revised decision. Complaint forms are available from each school.

9. Confidentiality

The School will ensure that applications are handled confidentially. For audit purposes, however, computerised copies of all documentation for learner support will be kept for a period of six years and will be held securely and in compliance with the Data Protection Act. The information will be made available for audit purposes.

10. Equal Opportunities

No applicant will receive less favourable treatment on the grounds of age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex or sexual orientation.

11. Review

This policy will be reviewed on an annual basis, taking into account the views of The Mercian Trust, young people and their parents and statutory guidance from the Department for Education (DfE) and the Education Funding Agency (ESFA).