

## Lonsdale School 16-19 Bursary Fund Policy 2023/2024



The 16-19 Bursary fund provides financial support to help students overcome the specific financial barriers to participation they face so they can remain in education.

Bursaries can only be awarded to a student who meets the eligibility criteria. Further information about the 16-19 Bursary Fund is to be found at:

<https://www.gov.uk/government/publications/16-to-19-bursary-fund-guide-2023-to-2024-academic-year/16-to-19-bursary-fund-guide-2023-to-2024-academic-year>

This policy details how Lonsdale School will administer the 16-19 Bursary in 2023/2024.

The named contact for all 16-19 bursary enquiries is Mrs S North, Head of Upper School.

### **Key points:**

There are two types of 16-19 Bursary.

- bursaries for defined vulnerable groups of up to £1,200 a year
- discretionary bursaries

### **Eligibility criteria: all bursaries**

A student must:

1. Be aged 16 or over but under 19 at 31 August 2023 to be eligible for help from the bursary fund in the 2023 to 2024 academic year.
2. Meet the residency criteria in [ESFA funding regulations](#)<sup>1</sup> for post-16 provision in the 2023 to 2024 academic year. This document also specifies the evidence institutions must see and retain for audit to confirm eligibility.
3. Be a full time student at Lonsdale School.

To apply, student/parent/carer will need to fill in the application form (Appendix 2) and also provide appropriate evidence of the benefit they are receiving and/or written confirmation from the local authority of their care status.

### **Vulnerable Bursary**

This has a value of up to £1200 a year. It is for students in one of the defined vulnerable groups listed below.

Benefits must be in the student's own name, not their parent/carer.

It includes those:-

- in care
- care leavers

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<sup>1</sup> <https://www.gov.uk/government/publications/advice-funding-regulations-for-post-16-provision>

- receiving Universal Credit (UC) because they are financially supporting themselves in their own right
- receiving Disability Living Allowance (DLA) or Personal Independence Payments in their own right as well as Universal Credit in their own right

1. The **Discretionary Bursary** has a value of up to £350 and is for those who are not in one of the specific vulnerable groups identified above, but need financial help to stay in education. It is a discretionary amount and is subject to availability of remaining funds. This may provide one-off funds in exceptional circumstances.

Any decisions about which students receive a discretionary bursary and how much bursary they receive is based on each student's individual circumstances and their actual financial need. These will vary from student to student, depending on, for example, their household income, the distance they need to travel to school and the requirements of their study programme.

School will not make blanket or flat rate payments to all students or to students in particular income bands without considering the actual needs of each student.

### **16 to 19 Bursary Fund and receipt of DWP benefits**

It is important to highlight to students and parents the impact of receipt of the 16 to 19 Bursary Fund on other benefits.

Receipt of bursary funding does not affect receipt means-tested benefits paid to families, such as Jobseeker's Allowance, Child Benefit, Working Tax Credit and Housing Benefit.

However, if a student is in receipt of Disability Living Allowance (or Personal Independence Payments) or in receipt of Universal Credit, parents can no longer receive certain household/family benefits for that child, such as child benefit.

### **Evidence**

All applications to access either of the 16-19 Bursaries must be supported by appropriate evidence.

Acceptable supporting evidence for the **Vulnerable Bursary** will be:-

- for students who are in care or a care leaver, written confirmation of their current or previous looked-after status from the relevant local authority - this is the local authority that looks after them or provides their leaving care services. The evidence could be a letter or an email but must clearly be from the local authority
- for students in receipt of Universal Credit, a copy of their Universal Credit Award notice. They must be entitled to the benefit in their own right and the evidence must confirm that the young person can be in further education or training (some young people in receipt of benefits are not allowed to participate). They must also provide additional documentation to confirm their independent status, for example a tenancy agreement in the student's name, a child benefit receipt, children's birth certificates, utility bills etc.

- for students receiving Universal Credit and Disability Living Allowance and Personal Independence Payments, a copy of the student's Universal Credit (UC claimants will be able to print off details of their award from their journal). Evidence of receipt of Disability Living Allowance or Personal Independence Payment, must also be provided

Acceptable supporting evidence for the **Discretionary Bursary** will be either:-

1. **Part 1 of the latest Tax Credit Award Notice** for the young person's household. This document from HM Revenue & Customs details entitlement to Tax Credits and the Total Income for the year 6 April 2022 to 5 April 2023.
2. **P60 End of Year Certificate(s)** for all adults in the young person's household who contribute to household costs. This certificate is a statement of earnings from an employer. It must be for the correct adult(s) and for the correct Tax Year (to 5 April 2023). The income will be shown as Total for year.
3. **Self Assessment Tax Calculation (SA302)**. This is the equivalent of the P60 for self-employed people. It must be for the correct adult(s) and for the correct Tax Year (to 5 April 2023). The income will be shown as Total for year.

**Payments of Bursaries are subject to the following conditions:**

1. Evidence of financial circumstances must be provided.
2. If students or their families have a change in circumstances, they must make this known to school. Bursaries may be reviewed in response.

### **Application**

Applications for a Bursary must be made using the application form.

Consideration must be given to assisting any young person to make an application where they are unable to do so due to a level of learning difficulty and/or disability.

Consideration must also be given to assisting any young person in making an application where they are not able to provide supporting evidence due to difficulties with engagement or support from their parent/guardian/carer(s).

## **Process**

All applications for a Bursary or to access the discretionary fund will be assessed by SLT (with the exception of the Head). SLT will review the application, supporting evidence and any other personal circumstantial evidence.

## **Appeals**

If any young person or their parent/carer(s) are not satisfied with the outcome of their application, they should contact the Head outlining their reasons why. It should be noted that eligibility criteria is determined by the DfE. The Head may convene an Appeals Panel; membership will include the Head and Chair of Governors<sup>2</sup> if a judgement cannot be immediately determined.

The Panel will consider and respond to appeals within **two weeks** of receipt. If the appeal is upheld, or partly upheld, it will be referred back, with recommendations, to SLT.

## **Confidentiality**

The applications and supporting evidence will remain confidential during processing, payment and storage. If it is necessary to obtain additional information to reach a decision, the young person and/or their parent/guardian/carer(s) will be told the reasons why this is necessary prior to sharing any information further.

## **Young Person Transferring**

Should a student in receipt of a bursary transfer *out of* school to another education/training provider in-year, school will liaise with that provider to ensure continuity of bursary payments to enable the young person to continue their learning.

If a student in receipt of a bursary transfers *into* school from another education/training provider in-year, school will liaise with that provider to ensure continuity to enable the young person to continue their learning aim.

## **Young Person Withdrawing**

Where a young person in receipt of a Bursary withdraws from the School, and does not transfer to another education/training provider, Bursary payments made prior to the date of withdrawal will *not* be recovered but any scheduled payments to be made after the date of withdrawal will not be made.

## **Further Information**

School will retain a sum equivalent to 5% of the annual grant to administer the fund and to use as a hardship contingency fund to respond to exceptional or circumstantial in-year change. The contingency fund will be reviewed in April 2024 and any remaining funds will be distributed to eligible young people or carried forward to the next academic year for distribution.


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<sup>2</sup> The Chair of Governors may delegate to another Governor

## Example of a Universal Credit monthly award notice

<b>How your Universal Credit payments are worked out</b>	
This is based on your circumstances between 1 December 2020 and 31 December 2020	
<b>1. First, we bring together the basic parts of Universal Credit that apply to you.</b>	
<b>Standard Allowance for you and your partner</b>	£498.89
<b>Housing Element</b>	£354.68
<b>Child Element</b> From 06/04/2017 Universal Credit will only pay the child element for 2 children or qualifying young people unless certain exceptions apply. For further information on when an exception may apply, see <a href="http://www.gov.uk">www.gov.uk</a>	£508.75
Children on your claim XX XX We pay £277.08 for your first child or qualifying young person. For each other eligible child or qualifying young person, we pay £231.67	
ESFA note: there can be other/different elements in this section.	
<b>Amount</b>	<b>£1,362.62</b>
<b>2. Next, we take account of any non-work income and other benefits you receive as well as your savings and capital.</b>	
<b>The total we take off for these items is:</b>	<b>£0.00</b>
<b>3. We then take account of your take-home pay</b>	
Take-home pay is what's left after tax, National Insurance and any pension contributions have been deducted.	
Your take-home pay for this period is <b>£1,352.85</b>	
The first £192.00 of your take-home pay doesn't affect your Universal Credit monthly amount. Every £1.00 you earn in take-home pay over this £192.00 reduces your Universal Credit by 63 pence.	£731.34
<b>The total we take off for take-home pay is:</b>	<b>£731.34</b>
<b>4. Lastly, we take account of any loans, advances, deductions and overpayments or third party payments you have.</b>	
Social Fund	£22.15
Budgeting Allowance	£15.00
<b>The total we take off for these items is:</b>	<b>£37.15</b>
<b>Total adjustments</b>	<b>£768.49</b>
<b>Your Universal Credit monthly payment for this period</b>	<b>£593.83</b>

ESFA note: institutions should use the two highlighted figures, take-home pay and the amount of Universal Credit after deductions, when assessing household income.

<p><b>Lonsdale School</b> <b>Bursary Application Form</b></p>	
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**Student details:**

Surname		
Forenames		
Address		
Postcode		
Date of Birth		
Form Group		
I confirm that I meet residency requirements		

**Application for**

<b>Vulnerable Bursary</b>	
I have previously been awarded a bursary	
I am in care	
I am a care leaver	
I am in receipt of Universal Credit	
I am in receipt of Disability Living Allowance (DLA) or Personal Independence Payments <u>as well as</u> Universal Credit	

**Application for**

<b>Discretionary Bursary</b>
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Have you previously been awarded a 16-19 bursary?	
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**Household income**

Please include the appropriate supporting documents as applications cannot be processed without them. Information will be kept for auditing purposes and will be treated in the strictest confidence.

My Total Annual Household Income is:	
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	£
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**Please tick any documents provided as evidence:**

Receipt of benefit	
P60 (tax year 2022-2023)	
Tax Credit Award (Tax Year 2022-2023)	
Evidence of self-employment income (Tax year 2022-2023)	
Universal Credit award notice (monthly)	
Other – Please state:	

- I confirm that the above information is true and correct to the best of my knowledge and belief.
- I agree to inform school should my financial situation change during the time I am claiming a bursary. I understand that failure to do so may result in the loss of my bursary and I may be required to pay back any money overpaid as a result of this failure.

Signed: \_\_\_\_\_ (student)

Signed: \_\_\_\_\_ (parent)      Print name: \_\_\_\_\_

<b>SLT Use only</b>			
Date application received		Date application reviewed	
Supporting documentation	Provided	Any Additional Information:	
	Copied		
	Returned		
Vulnerable			
Amount awarded			