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**EWS 16 to 19 Bursary Fund guide: 2020 to 2021 academic year**

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## What is a Bursary Fund?

The 16 to 19 Bursary Fund is designed to help students overcome the individual financial barriers to participation that they face and ensure the funds go to those who genuinely need them.

There are 2 types of 16 to 19 bursaries, these are defined by The Education and Skills Funding Agency (ESFA) as:

* Bursaries for defined vulnerable groups of up to £1,200 a year. These are defined by EWS at Level 1 bursaries.
* Discretionary bursaries which institutions award to meet individual needs, for example, help with the cost of transport, meals, books and equipment. These are defined by EWS as Level 2 bursaries.

In accordance with ESFA guidelines we are permitted to use up to 5% of ourtotal bursary allocation for administrative costs.

## Eligibility criteria: Age

A student must be aged 16 or over but under 19 at 31 August 2020 to be eligible for help from the bursary fund in the 2020 to 2021 academic year.

Students aged 19 or over are only eligible to receive a discretionary bursary if they are continuing on a study programme they began aged 16 to 18 (‘19+ continuers’) or have an Education, Health and Care Plan (EHCP).

These 2 groups of aged 19+ students can receive a discretionary bursary while they continue to attend education (in the case of a 19+ continuer, this must be the same programme they started before they turned 19), as long as their eligibility continues and their institution considers they need the support to continue their participation.

Students aged 19 or over are not eligible for bursaries for vulnerable groups (Level 1 Bursaries).

## Eligibility criteria: Residency

Students must meet the residency criteria in [ESFA funding regulations](https://www.gov.uk/government/publications/advice-funding-regulations-for-post-16-provision) for post-16 provision. This document also specifies the evidence institutions must see and retain for audit to confirm eligibility for post-16 funding (and therefore meet the residency criteria for bursary fund eligibility).

## Eligibility criteria: Level 1 bursaries

Students who meet the criteria, and who have a financial need, can apply for a bursary for vulnerable groups. The defined groups reflect that these students are unlikely to be receiving financial assistance from parents or carers, so may need a greater level of support to enable them to continue to participate.

Students should be awarded the amount of support they need to participate based on an assessment of the types of costs they have. Institutions must ensure students are eligible for the bursary for defined vulnerable groups in each year they require support.

The defined vulnerable 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 on them and living with them such as a child or 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

The ESFA are continuing to review the descriptions of the defined vulnerable groups to reflect the ongoing rollout of Universal Credit and ensure they accurately reflect the purpose of the scheme.

Institutions may decide that although a young person may be eligible for a bursary because they are in one or more of the defined vulnerable groups, they do not have any actual financial need. This might be because their financial needs are already met and/or because they have no relevant costs. Institutions can refuse a student’s application on this basis. Similarly, students should only receive the amount they actually need to participate and institutions should not automatically award students £1,200 if they do not need the full amount.

Equally, institutions can pay a bursary to a vulnerable group student of more than £1,200 if they assess they need extra help to remain in education. Any payments over £1,200 must be paid from their discretionary bursary allocation or from their own funds.

Further information can be found here: <https://www.gov.uk/guidance/16-to-19-bursary-fund-guide-2020-to-2021-academic-year>

We are encouragedby the ESFA to provide support from the bursary fund by making payments in kind where possible.

We are not permitted to make bursary fund payments as regular payments for living costs. This is out of scope of the bursary fund and any such payments would be subject to the Social Security Amendment (Students and Income-related Benefits) Regulations 2000.

## Evidence of eligibility

We are required to obtain proof that students meet the criteria for the bursary for vulnerable groups in full. In other words, that they are in receipt of the specified benefits in their own name or that they fully meet the definitions for in care/care leavers. Institutions should ask for evidence from each student and retain copies for audit purposes. For example:

* 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 be clearly from the local authority
* for students in receipt of Income Support or Universal Credit (UC), a copy of their Income Support or UC award notice. This must clearly state that the claim is in the student’s name/confirm they are entitled to the benefits in their own right. The evidence must not state any conditions that prevent them from participating in further education or training. For students in receipt of UC, institutions must also see a tenancy agreement in the student’s name, a child benefit receipt, children’s birth certificates, utility bills and so on
* for students receiving UC/ESA and Disability Living Allowance and Personal Independence Payments, a copy of their UC claim from DWP. Evidence of receipt of Disability Living Allowance or Personal Independence Payment must also be provided

UC claimants should be able to print off details of their award from their online account.

## Young people eligible for Level 1 bursaries who don’t require bursary funding

In some cases, a young person might meet the eligibility criteria for a bursary for vulnerable groups but their financial needs are already met, they have no relevant costs or do not need the maximum award.

For example:

* a student attending specialist residential provision that covers their educational costs in full
* a student taking a distance learning programme who has no financial barriers to participation (for example, they don’t have any travel costs or meal costs)
* a student in the care of the local authority whose educational costs are covered in full by the local authority
* a student who is financially supported by their partner

In these circumstances, we reserve the right refuse the student’s application. However we would aim to consider the particular student’s circumstances in each case. We would aim to assess whether no bursary should be awarded (because the student has no financial needs) or to award a reduced amount (because the financial help needed is limited).

Please note that: The ESFA recommends that institutions should be clear in their bursary fund application form that there is a possibility of no award or a limited award. This ensures all parties understand that meeting the criteria for a Level 1 bursary does not automatically mean funding will be given. In these circumstances there is a possibility of no award or a limited award.

## Eligibility criteria: discretionary bursaries (Level 2 bursaries)

We are able to make discretionary bursary awards to students to help them overcome the individual barriers to participation they face. This means to help with the cost of travel, to buy essential books, equipment or specialist clothing (such as protective overalls, for example). These are items the student would otherwise need to pay for in order to participate.

All decisions about which students receive a discretionary bursary and how much bursary they receive must be 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 the institution and the requirements of their study programme. All students will be assessed on their individual circumstances and actual financial need. In addition, thepanel will look at the student’s wider family circumstance (such as a single parent family, carerresponsibilities), courses with higher equipment costs, free school meals.

Students can also apply more thanonce if their circumstances change and if this happens they will be reassessed including a one to one interviewto determine any exceptional circumstances that need to be taken into account.

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

## Discretionary bursary individual payments

In addition, students may experience exceptional circumstances during the academic year which may impactupon their ability to participate. In the case of this happening students can apply for individual paymentsthat can be used to pay for:

* Books / equipment / materials (such as laptops)
* Examination re-sit fees
* UCAS application fees / travel to open days
* Educational visits / field trips which are course related
* Criminal Record Bureau (CRB) checks
* Sports activities (where these contribute directly to a course)

The funds, however, for this may be limited and each application will be assessed separatelyaccording to individual need. Goods and services will be purchased by the School on behalf of the studentand students will not receive a lump sum if applying for an individual discretionary payment.

**What the bursary fund cannot be used for**

The bursary fund is not intended to

* provide learning support - services that institutions give to students - for example, counselling or mentoring
* support extra-curricular activities where these are not essential to the students’ study programme, or
* support general household incomes

Institutions are not permitted to use the bursary fund in any way that would give them a competitive advantage over other institutions. Examples include:

* fees for access to facilities in the institution
* block subsidy of the canteen
* block subsidy of transport, or support for travel for all students regardless of family incomes
* block provision of equipment, material or books
* making bonus payments to reward attendance or achievement
* payments to support student’s general living costs

Institutions must not use the bursary as a way of incentivising attendance or as a marketing tool to encourage students to choose their institution over another.

## Evidence of eligibility

Proof of income, in original documentary form, such as P60, Self employed incomenotification, receipt of benefit notification and / or free school meal notification,Universal Credit (UC) award notices when these are provided as evidence of household income. DfE suggests that we ask for the 3 most recent monthly award statements. The take-home pay figure in addition to the amount of UC after all deductions will give a total monthly income. Using 3 months statements will act as a guide to the household income for a quarter of a year. We are then able estimate assumed income for a full year.

Evidenceto support the amounts being claimed should also be made available such as a bus ticket price list, costingsfor equipment etc.

## Application Process

Bursary Scheme applications are to be made to Mr Martin by the end of September 2020, along with therequired evidence. The school will then process the application by mid-October 2020 and will advisestudents, in writing, of the outcome. Applications will also be considered throughout the academic year if/when the need arises.

Applications are not automatically carried forward year on year, a new application is required.

## Payment process

ESFA encourages institutions to pay bursaries in-kind rather than cash as far as possible. This helps ensure that the bursary is spent for the reasons it was awarded. In-kind payments can include travel passes, vouchers or credits for meals, required books and required equipment.

Where used for re-imbursement students will require their own bank account to receive the cheque or BACS payment. (Our preferred method is a BACS payment.)We are have the right to insist that students only spend the bursary payments they have made to them on the support that has been identified as necessary to help them participate in education. This means we can specify students can only use the funds to pay for travel costs and/or a meal during the day, to buy equipment or any other support that has been agreed.

ESFA does not expect bursary payments to be paid into another person’s account, except in exceptional circumstances where a student is unable to administer their own account. If the student cannot manage their own funds, the school will need to consider who will manage the bursary on the student’s behalf.

We are advised by the EFSA that if we purchase books or equipment such as laptops for a student, they are the property of the school and the student must return these at the end of their study programme so they can be used again by another student where appropriate. If keeping equipment on campus is the best way of ensuring this happens, we have the right to set this as a condition.

Payments will be authorised providing the following criteria are met:

* Students overall attendance is 96% or above. Allowances are made for exceptional circumstances for example ongoing illness or medical condition or other special circumstances that the school has been made aware of.
* Students must attend all timetabled lessons and sessions, including any collapsed days or events, unless absence has been authorised.
* Students must abide by the standards set out in the Sixth Form Charter.
* There are no changes to the personal financial circumstances detailed in the application for financial support.

Payments may be withheld if these criteria are not met. We reserve the right to stop payments where students have been absent for a period of 4 continuous weeks or more (excluding holidays) and where students have made a decision to withdraw from a study programme. We can also take money back from students if they have not spent it for the reasons it was awarded to them.

In regards to the Level 1 bursary any student who is assessed eligible by the academy they will thenmake the relevant application to the SBSS and therefore, payment made be made later than the discretionarypayments.

## Security of Personal Information

All applications will be made through the Finance Office. All personal information and evidence submitted insupport of the application will be stored securely and will remain strictly confidential.

## Appeals

Students have the right to appeal against a decision that the School has made, if they believe it to be unfairand can provide evidence to support this. A copy of the complaints policy is available from [www.ewsacademy.org.uk](http://www.ewsacademy.org.uk)

## Fraud

Parents / carers, together with the student, are required to sign the application form to confirm that the details given are correct and that they will notify the School of any change in circumstances. Parents andstudents are made aware, that in signing the application form, they understand that monies may be reclaimed and eligibility withdrawn should they knowingly provide information which is discovered to be false.

## Contact details

Gavin Martin

Director of Learning Post 16

gavin.martin@ewscademy.org.uk

Further information can be found on:

<https://www.gov.uk/guidance/16-to-19-bursary-fund-guide-2019-to-2020-academic-year>

## EWS Sixth Form Bursary Application Form 2020-2021

|  |  |
| --- | --- |
| Name:  | Tutor group: |

**Please ensure that the application form is completed in full and evidence required is provided.**

|  |
| --- |
| **Please tick which level of bursary you are applying for:** |
| Level 1 Bursary*Typically for students in care, or are care leavers, receiving Income Support, or Universal Credit 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 or Personal Independence Payments in their own right as well as Employment and Support Allowance or Universal Credit in their own right* |  |
| Level 2 Discretionary Bursary*All decisions about which students receive a discretionary bursary and how much bursary they receive must be 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 the institution and the requirements of their study programme. All students will be assessed on their individual circumstances and actual financial need. In addition, the panel will look at the student’s wider family circumstance (such as a single parent family, carer responsibilities), courses with higher equipment costs, free school meals.* |  |

|  |
| --- |
| **Please outline below the level of financial support required and purpose. Please supply as much information as possible:** |
| Expense | Details/ Reason | Amount requested |
| Books/ equipment for courses (please specify) |  | £ |
| Exam fees/ re-sits |  | £ |
| Transport to and from school (where possible this will be paid direct to the bus company) |  | £ |
| School lunch up to £2.30 a day |  | £ |
| Essential school trips |  | £ |
| Interviews and open days |  | £ |
| Specialist clothing for example protective clothing |  | £ |
| Sports activities (where these contribute directly to a course) |  | £ |
| Other costs |  | £ |
| **Total financial support required:** | £ |
| **Student contact details:** |
| Name of student |  |
| Address |  |
| Contact telephone number (mobile number) |  |
| Email address |  |

|  |
| --- |
| **Student bank account details:** |
| Account in the name of |  |
| Bank name and address |  |
| Sort code |  |
| Account number |  |

I confirm I have provided all copies of any documents/letters which support my application. Without this information it will not be possible to process your application for the bursary fund.

Your signature below confirms that the information you have provided is true and that you will notify the school if your circumstances change.

You understand that the Bursary will be provided on conditions set by the school in the bursary policy and that money may be claimed back if the information has been provided which you know to be false.

|  |  |
| --- | --- |
| Student signature |  |

|  |  |
| --- | --- |
| Parent/ Carer signature |  |
| Parent/ Carer (print name) |  |

|  |  |
| --- | --- |
| Date of application |  |

## Notification of qualification for the Bursary

Students will receive a letter confirming receipt of their application to the ‘16-19 Bursary Fund’ along with the support allocation awarded by the Bursary Fund Committee and, if appropriate, a payment scheme.