



TFT 16-19 Bursary Fund Policy

March 2024

Reviewed by: Elaine Hart, Trust Finance Director

Date agreed by Finance, Resources, Audit and Risk Committee: March 2024

Frequency of Review: Annually

Date of Next Review: March 2025

Introduction

1. The Futures Trust and its Trustees are committed to supporting young people to help them stay on at School after 16 years of age. It is the aim of the Trust to support the most vulnerable young people towards benefitting from the 16-19 Bursary Fund that has been established by the DfE.

The 16-19 Bursary Fund

2. The Government has set aside some money for schools to allocate to young people who need financial support to stay on in further education or training. This is called the 16-19 Bursary Fund.
3. It can help with any education-related costs that may arise during the school year, including essentials like a meal during the day or transport to school, college or training provider. Or it might help to buy books, clothing or equipment for courses, or pay for educational visits.

Bursaries available

4. There are two types of bursary:

(A) **Vulnerable Student Bursary** of up to £1,200 for students who:

- are in local authority care or have recently left local authority care; or
- receive Income Support or Universal Credit (a new benefit which will replace Income Support) in their own name; or
- are disabled and receive both Employment Support Allowance (ESA) and Disability Living Allowance (DLA) or Personal Independence Payments (a new benefit which will replace Disability Living Allowance) in their own name. (These two benefits must be in combination.)

5. Funding for vulnerable groups is held centrally by the Student Bursary Support Service (SBSS) and the schools will apply for the funding on behalf of the student. The schools will hold back any payments if the criteria is not met.

Definitions of young people in local authority care:

6. Definitions as follows:
 - Eligible children ('looked after'): this is a child who is looked after, aged 16 or 17, and has been looked after for a period of 13 continuous weeks or periods amounting to 13 weeks, which began after s/he reached 14 and ended after s/he reached 16.

- Relevant children ('care leavers'): this is defined as a child who is not looked after, is aged 16 or 17, and was, before s/he ceased to be looked after, an eligible child.
 - Former relevant children ('care leavers'): this is defined as a young person who is aged 18 or above, and has been either a relevant child and would be one if s/he were under 18, or immediately before s/he ceased to be looked after at 18, was an eligible child.
7. The schools are responsible for assessing if students are eligible to receive a vulnerable bursary payment and for retaining evidence to support the decision. The schools will only submit a vulnerable bursaries funding claim to the SBSS when they have seen and verified appropriate evidence that the student is eligible.

Evidence of eligibility

8. For example:
- For students in receipt of qualifying benefits, a letter from Department for Work and Pensions (DWP) that states the benefit the student is entitled to (they must be entitled to the benefits in their own right). 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).
 - 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.
9. The vulnerable bursary can be paid for each academic year the student is in education or training, as long as they continue to meet the scheme eligibility criteria.
10. For payments to be made, the schools require the Bank Details Form and Bursary Application Form returned to the Post 16 Administrator. The schools will also require proof of the student bank account details in the form of a bank statement or bank card with student name and account number on.

(B) Discretionary Bursary

11. Students can apply for a Discretionary Bursary if they aren't eligible for a Vulnerable Bursary but need financial help to stay on in further education or training.
12. The schools receive a limited amount of funding each year and need to ensure it gets to the students who most need the financial help to stay on in further

education or training. The amounts received by the schools will influence the amount which individuals can be paid.

13. The schools will establish the number of students who have applied for financial support and then match with DfE funding. Some students will not qualify or will not receive the level of funding we would like to provide because of financial constraints on the schools. Funds will be allocated in line with the 16-19 Bursary Guidance.
14. Applicable to students who experience unexpected financial hardships that would detrimentally impact on their ability to access education. Whereby, discretionary bursary payments would remove the barriers from the student enabling continued educational experience in school.

Proof of entitlement

15. To be eligible for consideration, students must be in receipt of Free School Meals (FSM).

Other circumstances for eligibility of a Discretionary Bursary

16. Where students are in receipt of the Disability Living Allowance/Personal Independence Payments they must also receive Employment Support Allowance as well to qualify for a Vulnerable Bursary. If students receive just one of these benefits, they can apply for a Discretionary Bursary. The schools will need to see evidence that proves a student is eligible to apply. This could be a letter from the Department of Work and Pensions confirming the types of benefits paid.

How to Apply

17. To apply for a bursary, students must be at least 16 years old and under 19 years old at the start of any academic year (this is generally 1st September). Students must also be taking part in full time or part time further education or training.
18. An Application Form can be obtained from either the Post 16 College Director or Post 16 Administrator, who will be able to advise students on what they need to do.

16-19 Bursary Fund eligibility criteria:

19. To be eligible for consideration, students must be in receipt of FSMs as notified by the local authority.

20. Setting up process:

- i. Student's parent applies to the local authority for FSM – online. ii. Schools will be notified weekly of students who are eligible for FSM.
- iii. Letter (appendix 1.0) sent from schools to inform parents that student is eligible to claim Bursary Fund. Enclose Bank Details Form and Bursary Application Form (appendix 1.1). BAF will be used as evidence that parent has received the letter with all details of bursary processes and payments and Terms and Conditions of Bursary Fund (appendix 4.0). Enclose Claims Process Information (appendix 3.0) and List of Claimable Items (appendix 3.1).
- iv. Email (appendix 2.0) sent to individual students by Post 16 Administrator confirming eligibility for Bursary Fund. Attach copy of letter sent to parents with Claims Process Information, List of Claimable Items and Terms and Conditions.
- v. Bursary Fund file set up for individual students for receipt collection and claim forms (kept in Post 16 admin. office).

Claims process:

21. Students can only claim after the following are confirmed and forms received by Post 16:

- Eligibility for FSM confirmed (Council list).
- Bank Details Form returned with copy of bank card or statement from bank showing account number and student name.
- Bursary Application Form returned, signed by parent/guardian.

22. Students MUST present receipts for items purchased to the Post 16 Administrator.

23. Receipts and other payments* will be collated by the Post 16 Administrator and the Post 16 Pastoral Leader and then processed through the school Finance Department.

24. Payments will be made directly into the student bank account at the end of each half term.**

**Some school events may be paid for directly from the Bursary Fund. In this instance the school finance department should create a receipt for Post 16 to place on Bursary Fund file for tracking purposes.*

***Advance payments may be available in some circumstances. This will be at the discretion of the Post 16 College Director.*

Appendix 1.0: Letter to parents

Dear (PARENT NAME(S)),

16-19 Bursary Fund

We are pleased to inform you that as your son/daughter (STUDENT NAME) is currently in receipt of Free School Meals, they meet the eligibility criteria set by The Futures Trust to access financial support for their Post 16 study. This comes from the Post 16 Bursary Fund.

Under this scheme (STUDENT NAME) may be able to claim back expenses relating to Post 16 study up to the amount of approximately £125-£175 per half term, but not exceeding £1,200 per annum. The amount of financial support allocated will be based on the financial needs of the student.

For payments to be made we require the Bank Details Form (to be completed by STUDENT NAME) and Bursary Application Form (to be completed by STUDENT NAME and parents) returned to the Post 16 Administrator. We shall also require proof of the student bank account details in the form of a bank statement or bank card with student name and account number on.

Please see attached the following information regarding the Bursary Fund; Claims Process information including deadlines for the production of receipts; List of Claimable items; Terms and Conditions which will affect the payments made.

Students will need to provide receipts evidencing expenditure for study related items or travel.

Please read through these details carefully and do not hesitate to contact us if you have any queries or questions.

Yours sincerely,

Post 16 Pastoral Leader

Appendix 1.1: 16-19 Bursary Fund Application Form

**16-19 BURSARY FUND APPLICATION FORM 20XX-
XX ACADEMIC YEAR**

PROTECTION OF PUBLIC FUNDS
We must protect the public funds we handle and so we may use the information you have provided on this form to prevent and detect fraud. We may also share this information, for the same purposes, with other organisations that handle public funds, and with this in mind, a sample of applications will be chosen at random for full investigation.

DATA PROTECTION
The data controller is The data you provide towill be used to assess and facilitate your entitlement to help from the 16-19 Bursary Fund., in fulfilling its data protection obligations will treat all personal data, held manually and on a computerised database with due care, and will only disclose data in accordance with the Data Protection Act 1998

SECTION A: PERSONAL DETAILS

Surname/Family name

First name(s)

Date of birth

Present Home address

(if your address changes please notify us)

Telephone number

Email address

SECTION B: COURSE DETAILS

Name of school

Course Name and description

Which year will you be in 12: 13: Extra year:

Are you entitled to Free School Meals? Yes No

SECTION H: DECLARATION BY PARENT OR GUARDIAN

It is important that you read the following statement carefully. We will not consider this application unless it is signed and dated by a family member or guardian, as appropriate.

- *The information I have given on this form is accurate.*
- *I will inform you immediately of any change in my personal circumstances as they occur.*
- *I understand that if I provide false or incomplete information, I will have to repay any money given to the applicant to help with their study.*
- *I have read and understand the Terms and Conditions provided and information relating to the claims process and deadlines.*

Signed : _____ Date: _____

Signed : _____ Date: _____

SECTION I: DECLARATION BY LEARNER

It is important that you read the following statement carefully. We will not consider this application unless it is signed and dated by you.

- The information I have given on this form is accurate.
- I will inform you immediately of any change in either my own or my family's personal circumstances as they occur.
- I understand that if I provide false or incomplete information I will have to repay any money given to me to help me study
- I have read and understand the Terms and Conditions provided and information relating to the claims process and deadlines.

Signed : _____ Date: _____

Appendix 2.0: Email to Students

Dear Student,

We are pleased to confirm that you are currently eligible to claim from the 16-19 Bursary Fund. Please find attached a copy of the letter sent to your parents with details of the Claims Process, List of Claimable Items and the Terms and Conditions of the Bursary Form.

Please ensure you read these carefully.

Any questions or concerns please do not hesitate to contact me or the Post 16 Pastoral Leader.

Regards,

Post 16 Administrator

Appendix 3.0: Claims Process Information

In order to claim back items students will need to:

1. Keep all receipts for items purchased relating to supporting Post 16 study.
2. Check items are acceptable using the list below before putting the receipt in for a claim.
3. Hand receipts to the Post 16 Administrator. They will be kept on file until the second last week from the end of term when the information will be collated. Claims must be approved by the Post 16 College Director before being processed by the school Finance Department.
4. Payment for approved claims will be paid directly into the student bank account during the half term break.

Receipts must be handed in by the deadlines set for reimbursement to take place each half term. Receipts presented after the deadline will be carried over for reimbursement in the following payment schedule.

Claim deadlines:

For payment of claims each half-term, please take note of the deadlines below:

- Easter Holiday: 8th March 2024
- May half term: 10th May 2024
- Summer Holiday: 5th July 2024
- October half term: 11th October 2024
- Christmas Holiday: 6th December 2024
- February half term: 31st January 2025

Appendix 3.1: List of Claimable Items

Items that could be claimed on the Post 16 Bursary Fund include but are not limited to:

- Travel to school
- Stationery / equipment for school
- Textbooks
- Clothing to conform to Post 16 Dress Code
- School trips and visits
- UCAS administration fees
- NUS card
- Resit exam fees

All payments will be made directly into the student's bank account and will be at the discretion of the Post 16 College Director.

Appendix 4.0: Terms and Conditions

1. Payments will be made ONLY for items covered by the List of Claimable Items and all payments made will be at the discretion of the Post 16 College Director.
2. Poor attendance and punctuality of individual students will result in the available amount of bursary payment being reduced. i.e. If a student has any outstanding N (no reason provided for absence) marks, has two or more L (late) marks in one week, has two or more I (illness) marks in one week, or has an overall percentage attendance of at least 90%.
3. Any breach of the students Post 16 Learner Agreement will affect Bursary Fund payment.
4. Half termly payments will be subject to deadlines for receipts being presented to the Post 16 Administrator. Receipts presented after the deadline will be carried over for reimbursement in the following payment schedule.
5. If your circumstances change throughout the school year your eligibility for Bursary Fund may change and you may no longer be able to make claims.
6. If students have queries regarding their Bursary Fund payments they should make an appointment with Post 16 Pastoral Leader to discuss these.
7. For claims made that exceed the available half termly amount, students will be expected to pay the difference.
8. There may be occasions such as residential school trips; where the half termly available amount will not cover costs. At the discretion of the Post 16 College Director funding may come from the next termly allowance but will not exceed the maximum annual available amount for the individual. Where poor attendance and punctuality have an effect on the amount available, an average will be taken based on previous half termly payments.
9. Where advance payments are authorised by the College Director, any change in circumstances resulting in students no longer being eligible for Bursary Fund, or any breach of the learner agreement; including punctuality and attendance; full repayment of the amount advanced will be charged to the student.
10. Students who are considered Vulnerable under the criteria set by the government will be eligible for the full annual Bursary Fund amount regardless of other factors. The eligible groups are students who are: in care, care leavers, getting Income Support (IS) or Universal Credit (UC) in place of Income Support in their own right, getting Employment Support Allowance (ESA) or Universal Credit and Disability Living Allowance (DLA) or Personal Independence Payments in their own right. Evidence must be provided in all cases.