



**16-19 BURSARY  
FUND  
POLICY 2023-24**

## DOCUMENT CONTROL

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Version	Date	Comments	Author
01	July 2015		B Simpson
02	September 2016	J Sunter will be administering fund	B Simpson
03	July 2017	Amendments to D1 pay structure & clarity to application form	B Simpson
04	October 2018	Policy reviewed against DfE guidance 2018/19	B Simpson
05	September 2019	Policy reviewed against DfE guidance 2019-20 Note to move review window to July 2020 to support earlier applications in academic year Guidance on Brexit Removal of flat rate payment as standard	B Simpson
06	September 2020	Policy reviewed against DfE guidance 2019-20 Note to move review window to July 2020 to support earlier applications in academic year Removal of Guidance on Brexit Removal of flat rate payment as standard	A Haslop

07	September 2021	Policy reviewed against DfE guidance 2021-22 Note to move review window to July 2022 to support earlier applications. Inclusion of bursary payment examples, confidentiality and equal opportunities	A Haslop
08	September 2022	Policy reviewed against DfE guidance 2021-22 Added categories for eligibility Inclusion of definition of Discretionary 1 bursary Change to the structure of the eligibility of D1 & D2 bursary Added annual household income for D2 AND D3 bursary Bursary Fund application form changes	A Haslop
09	September 2023	Policy reviewed against DfE guidance 2022-23 Added categories for eligibility Inclusion of definition of Discretionary	A Haslop

## **INTRODUCTION**

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 fully participates and benefits from a place in 16 to 19 education or training.

The 16-19 Bursary Fund targets support towards the most financially disadvantaged 16 to 19 year olds; those who most need help with the costs of staying on.

This fund is made available from the government through its funding body, the Education Funding Agency (ESFA), to provide assistance to students whose access to and participation in education is inhibited by financial constraints or barriers. There are two types of bursaries available: a vulnerable bursary and a discretionary bursary (detailed below).

West Lakes Academy will determine the eligibility criteria for **discretionary** bursaries, and the frequency of and conditions for payments for all awards. The 16-19 Bursary will be awarded to a student that is eligible and facing genuine financial barriers to participating.

## **ELIGIBILITY**

To be eligible to receive a 16-19 Bursary in the 2023-2024 academic year, the student must be aged 16 or over and under 19 at the start of the academic year.

**Age** - 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.

**Residency** - Students must also satisfy the residency criteria set out in the \*ESFA Funding Guidance 2022 to 2023. (*A person on 1 September who is settled in the UK, and has been ordinarily resident in the UK and Islands for the three years preceding the 1 September*). If you are in any doubt, please speak with either Pastoral Head of Sixth Form.

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 West Lakes Academy fulfils the criteria.*)

The 16-19 Bursary Fund is a limited fund and the academy will prioritise allocation according to household income. There will be three discretionary groups, categorised as one, two or three. Providing the required documentary evidence is submitted, students in the discretionary one group will receive a vulnerable bursary, and students in the two and three discretionary groups will receive a discretionary bursary.

## **BURSARY FUND LEVELS**

### **DISCRETIONARY ONE – Vulnerable Student Bursary**

This is a guaranteed bursary of up to £1200 per year for young people of the defined vulnerable groups.

Students must fall into one of the categories below to be eligible for a vulnerable student bursary:

- In care
- Care leavers
- Receiving Disability Living Allowance (DLA) or Personal Independence Payments (PIP) in their own right as well as Employment and Support Allowance (ESA) or UC in their own right
- Young people in receipt of 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

The money will be spent in collaboration with the Pastoral Head of Sixth form to best support the attainment and needs of the student. Students are still free to apply for extra funding through the discretionary bursary system as well as being in receipt of this support. Payments will be transferred to the student's bank account via BACS upon authorisation from the school that the student has satisfied all the attendance and behaviour requirements.

## **DISCRETIONARY TWO**

Students who are eligible for this bursary are;

- Students who are in year 12 or 13, who are not eligible for Discretionary One bursary but who are in receipt of free school meals
- Students who have received free school meals at any time in the past six years ('Ever 6')
- Students who are children of service personnel ('Ever 4')
- Students whose household income is less than £17000 are eligible to receive a bursary payment

A projected scheme of £600 per year is available to apply for based on historic models. Following a meeting with the Head of Year/ Bursary lead, to agree what the Bursary will be used for and how it will support their studies all payments will be designed to meet the individual students need and will not be a flat payment model. These payments will be made in arrears.

Students will be informed of any delays in payment or non-payment in writing. However students should check their payments regularly and in the case of non-payment they should contact a Pastoral Head of Sixth Form/ Bursary lead for clarification.

Any student who is in Discretionary One or Two will be identified by the academy from our academy records. Students in these categories will be automatically assessed and informed of their option to take up their 16-19 Bursary grant in writing.

If any student believes they should be eligible for support under Discretionary One or Two but have not received written information they should contact the head of sixth form as soon as possible.

## **DISCRETIONARY THREE**

Students who are eligible for this bursary are:

- Students who are in year 12 or 13 and who are not eligible for Discretionary One or Two bursary and have a household income of less than £25000 a year
- Students who have exhausted their Discretionary One or Two bursary and have further financial needs may apply for a Discretionary Three bursary grant to support their learning

Bursary applications must be received using the West Lakes Academy 16-19 Bursary application form; these are available via the sixth form office. All applications will be considered by the \*\*Bursary Awards Panel and a Bursary Fund checklist, provided by the ESFA, will ensure all funding criteria is met.

## **RURALITY**

Due to the rural nature of the academy, funding for travel should not impact on the further educational needs of any student. Discretionary one students should be able to apply to county council to support their funding. Any student who is Discretionary two or three and needs to apply for transport funding should complete the separate Transport funding request form with the Bursary application. If it is a school bus route we will use the bursary funding to apply to the spare seats scheme. If it is a service bus a claim form should be submitted for the year and evidence of receipts should be supplied as requested. Funds will be supplied on a termly basis to support all transport needs. Students can also apply for funding to cover parking and fuel expenses if a need can be demonstrated.

## **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 submit it in to the Pastoral Head of Sixth Form as soon as possible, after admission in September, or when an identifiable need arises. A student in receipt of any level of bursary must inform the Pastoral Head of Sixth Form of any changes to family circumstances that may affect the support during the academic year. Students who become eligible during the academic year should contact the Pastoral Head of Sixth Form and make an application where required. If a student falls into Discretionary one or two during the academic year payments of claims can be backdated up to 28 days. Payments to all successful claimants will be backdated to September where appropriate. Evidence of income and overall eligibility will be obtained and stored securely following the academy's GDPR procedures.

## **STUDENT EDUCATIONAL NEEDS**

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

- Public transport to and from school – termly or monthly bus passes (students are required to claim for travel expenses in October, this will be followed by bus passes issued by the Trust).
- School uniform / sports kit
- Trips and UK education visits
- University visits / interviews
- Curriculum materials / equipment – books, revision guides, etc.
- Examination fees
- Music tuition fees – for tuition organised by the school
- Other items

## **PAYMENT REQUIREMENTS**

To receive any funds once the school has acknowledged eligibility, participating students at West Lakes Academy must adhere to the criteria laid out below.

Students must also abide by the standards of behaviour and effort as agreed at the start of their 16-19 education as detailed in the Sixth Form Code of Conduct. If poor behaviour or effort is

reported and supported by documentary evidence, the student may have their discretionary Bursary funding removed or reduced.

Attendance: This must remain above 95%, if attendance falls below 95%, then bursary payments may be withheld or adjusted, unless there are exceptional circumstances.

Behaviour: No negative behaviour should be reported, if unsatisfactory behaviour is identified, then bursary payments may be withheld, until behaviour improves or intervention with Head of Year is put in place.

Submission of work: All deadlines both internal and external should be met with no notification of concerns received by the Head of Sixth Form.

Attainment: If students are underperforming in subjects, the bursary payments may be withheld until subject teacher confirms that an improvement in attainment is evident.

An award letter will be issued to the student confirming the amount of support they will receive, what support will be made in-kind and the payment conditions.

## **APPEALS**

### **DISCRETIONARY 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 withheld without justification.

### **DISCRETIONARY 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 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.

In the first instance the student should explain, (with supporting evidence if appropriate) within one school week, to the Pastoral Head of Sixth Form, why the payment should have been made. If the decision to withhold payment is upheld then the student may appeal to the Head of Sixth Form. This is the final appeal and must be made within one further week.

### **DISCRETIONARY 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.

\* Education Funding Agency

\*\* Will comprise 1 member of Finance, at least 1 member of Sixth Form staff, 1 member of the Academy Leadership Team and 1 Academy governor.

## **INFORMATION AND APPLICATION**

Information on how to apply for the bursary will be published on the academy's website and will also be available from the Sixth Form Office.

Applications should be made on the bursary application form, available from the Sixth Form Office or on the academy's website.

Applications should be made as soon as possible and by Friday 20th October 2023 at the latest for payments to support regular needs such as transport. Other applications can be submitted at any point.

Students who apply for the discretionary one £1,200 Bursary will need to provide documentary evidence to show that they fall into one of the nominated vulnerable groups, as detailed on the application form if they have not been identified by the academy.

Other applications must be supported by relevant documentary evidence, as detailed on the application form.

Bank account details will be requested so that payments can be made directly to the account (the account must be in the name of the student unless the student cannot open a bank account. If this is the case payments can be made into another account AFTER written confirmation has been received from the student.)



## **FRAUD**

Any student found making a fraudulent claim for bursary funding will be reported to the police. Students who have received funding and are found to have made a fraudulent application will be required to refund all payments received and will be excluded from the Academy.

## **CONFIDENTIALITY**

The academy 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.

## **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.

## **NOTES**

To enable staff to support and advise students in receipt of Bursary funding an accessible record will be held on SIMs. Students will either be identified as:

- D1: Vulnerable Bursary
- D2: Ever6 students
- D3: Students who have applied to the Bursary fund for support

**WEST LAKES ACADEMY 16-19 BURSARY APPLICATION FORM ACADEMIC YEAR  
2023-2024**

Form to be completed by student:

Student Name	
Date of Birth	
Address	
Tutor	
Year	
Date	

**Household details**

<i>Please state who you live with and their relationship to you e.g. Mother, Father, Brother, Sister etc.</i>		
<b>Name</b>	<b>Relationship</b>	<b>Age if under 16</b>

**Level Required:**

Discretionary One (D1 on SIMs)	Discretionary Two (D2 on SIMs)	Discretionary Three (D3 on SIMs or no indicator)

**Household Income**

Please include the required supporting documentation with this form. All evidence will be photocopied and dealt with in the strictest of confidence. (Please do not send any original documentation in the post), Students should take it directly to the Pastoral Head of Sixth form who will arrange have the documentation copied and returned to you as soon as possible.

<b>Total household income is:</b>	<b>£</b>

Please briefly outline information and cost for the required resource/s you are applying for to support your studies. If you are applying for a sum of money the reasons for this must be outlined clearly below. The Bursary fund is to support students who are struggling with the costs of their studies.

<p>For D2 and D3 application please give evidence of household income. (This should include benefits such as Universal credit, income support etc. but not child benefit)</p> <p>This must be signed by a parent/guardian and we may request evidence to confirm this declaration for the Process of audit such as UC monthly award notices (three months to calculate an annual amount.).</p>	
<p>What will the funds be used for? (Please continue on additional paper &amp; attach)</p> <p>Please attach evidence to support your application.</p>	
<p>If funds are for a specific subject please make sure that you have discussed this with a subject teacher and they have advised you. If it is for other purposes please discuss it with your tutor or head of sixth form.</p> <p>Record date and signature in this box</p>	

**Transport funding request:**

Home address	
Have you used a WLA school Bus	
Bus route/name/number	
Service bus route	
Projected annual cost based on tickets or pass cost	

**Students Bank Account Details**

To enable payment please complete the bank

details below: Bank Name (e.g. Barclays)

Branch Location (e.g. Carlisle)

Name of Account Holder

Sort Code

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Account Number

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We confirm that the details provided to support this application for the 16-19 bursary are true and accurate. We understand that the above-named student must comply with the terms of the West Lakes Academy Bursary Scheme Code of Conduct and that giving false or incomplete information that leads to incorrect/overpayment may result in future payments being stopped and any incorrectly paid funds being recovered.

We understand that we must notify the Pastoral Head of Sixth form immediately if there are any changes in financial circumstances to ensure that funding is paid at the correct level.

Signed (student) .....Date .....

Signed (parent) .....Date .....