

# Queen Elizabeth's Girls' School

## 16-19 Bursary Fund Policy

**POLICY TITLE:** 16-19 Bursary Fund Policy

**STATUS:** Statutory

**REVIEWED BY:** D Jones

**DATE AGREED BY GOVERNORS:** 9 July 2019

**DATE OF NEXT REVIEW:** June 2020

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### 1. Introduction

The 16-19 Bursary Fund provides financial support to help students overcome specific barriers to participation so they can remain in education. The fund is money given to post-16 providers by the Education and Skills Funding Agency (ESFA). Many will experience financial difficulties with costs such as transport, food or equipment. Eligibility is based on the student meeting residency requirements and being on a means-tested or disability benefit.

### 2. The Bursary Scheme

There are two types of 16 to 19 bursaries:

- I. Higher-priority claimants (defined vulnerable groups) who will receive a bursary of up to £1,200.00 per year from the school fund
- II. Discretionary bursaries awarded to Mid and Lower-priority claimants, to meet individual needs. For example, to help with the cost of transport, meals, books, equipment, field trips and other course-related costs.

The school is responsible for managing both types of bursary. Students who want to apply for support from the bursary fund should complete and submit an application form by Friday 20<sup>th</sup> September 2019.

### 3. Eligibility criteria – all bursaries:

To be eligible for either type of bursary in the 2019/20 academic year, the student must:

- Be aged over 16 and under 19 at 31 August 2019
- Be aged 19 or over at 31 August 2019 and have an Education, Health and Care Plan (EHCP)
- Be aged 19 or over at 31 August 2019 and continuing on a study programme they began aged 16 to 18 ('19+ continuers')
- Meet the residency criteria in section 3 of the ESFA document 'Funding guidance for young people 2019 to 2020'. Section 3 of this document also specifies the evidence the school must see to confirm eligibility.
- The student must also meet the criteria of either the higher, mid or lower-priority group (see 3.1-3.3 below).

### 3.1 Criteria for the vulnerable bursary (higher-priority group - Priority 1)

Students must fall into one or more of the categories below to be able to apply for a Priority 1 bursary:

1. In care
2. Care leavers
3. 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
4. Young people in receipt of 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.

More information about Income Support can be found at [www.gov.uk/income-support](http://www.gov.uk/income-support)

More information about Universal Credit can be found at [www.gov.uk/universal-credit](http://www.gov.uk/universal-credit)

More information about Employment and Support Allowance can be found at [www.gov.uk/employment-support-allowance](http://www.gov.uk/employment-support-allowance)

More information about Personal Independence Payments can be found at [www.gov.uk/pip](http://www.gov.uk/pip)

The allocation of these funds will be subject to audit so the school will require proof that the application is genuine in the form of written evidence from the young person and her key worker. The school will seek and retain copies of evidence from the young person, bearing in mind confidentiality. Appropriate evidence includes,

- 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. This could be a letter or an email but must be clearly from the local authority
- for students in receipt of Income Support, a copy of their Income Support 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)
- 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/Employment and Support Allowance and Disability Living Allowance and Personal Independence Payments, a copy of the student's Universal Credit or ESA award from DWP (UC claimants will be able to print off details of their award from their online account). Evidence of receipt of Disability Living Allowance or Personal Independence Payment, must also be provided.

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.

### **3.2 Criteria for mid-priority group (Priority 2)**

Where a student does not meet the higher-priority group criteria she may still be eligible for support. The school's criterion is students who are entitled to free school meals (FSM). The school will need to be satisfied that the application is genuine following the standard procedures that are currently in operation for application for FSM.

### **3.3 Criteria for lower priority group (Priority 3)**

Where there is a surplus of funds after the allocation to students in Priority 2, then students with household incomes of less than £20,817 may apply for a lower level of support determined by their specific needs. See section 5 below regarding how the funds are allocated.

The following evidence will be required for students in this group:

- A copy of entitlement to means-tested state benefit, or Tax Credit Award Notice confirming household income of less than £20,817; or
- Evidence of income from self-employment, a P60, or 3 to 6 months' worth of bank statements as evidence; or
- 3 most recent monthly award statements for Universal Credit.

## **4. Applications**

The fund will be open for applications for the following academic year from July each year. Application forms will be available in paper format from the school and should be submitted by 20th September 2019. Funding is not guaranteed by the acceptance of an application form.

## **5. Allocation**

All decisions about which students receive a discretionary bursary and how much bursary they receive are 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 number of dependent children in the household, the distance they need to travel to school and the requirements of their study programme.

Once it is established who will be supported, the funds will need to be divided:

- 5% of the fund will be held back to cover administrative costs
- Some funding will be held back for applicants who join later on in the year or whose personal circumstances change.
- The allocation to the Priority 2 students needs to be fair; students that apply will be assessed individually and will be awarded a bursary based on their actual financial need but with a cap of £800pa.
- If there is still money in the fund after allocation of funds to Priority 2 students referred to above then students with household incomes of less than £20,817 may receive a bursary of up to £200. This could be in the form of the payment for specific items required (e.g. textbook or trip that is necessary for course of study).
- The allocation criteria will reflect the school's Equalities policies and codes of practice, and be endorsed by school committees.
- Where a student is required to attend a subject related trip (e.g. Geography field trip) the appropriate amount will be deducted from the allocation prior to the student receiving their next allocation.
- The funding for Priority 1 students comes from the Student Bursary Support Service (SBSS) and is held centrally, so does not form part of the allocation set out above.

## **6. Conditions for Receipt of Student Bursaries**

Receipt of both vulnerable student bursaries (Priority 1) and discretionary bursaries (Priority 2 and 3), is conditional on the student meeting the following standards,

- no unauthorised absence during the period the payment covers
- no lates without a valid reason during the period the payment covers
- good behaviour

Evidence that each student has agreed to these conditions will be shown by the signed declaration in the application form (see Appendix 2).

## **7. Appeals**

Students have the right to appeal a decision. Students, or their parent/guardian, will be required to put any appeal in writing within 21 days of receiving confirmation of an award or a rejection.

1. The letter should set out the reasons for the appeal, which must prove that the student has been wrongly assessed as falling outside the eligibility criteria, plus any further evidence to support the Appeal. It should be sent to the Sixth Form Office.
2. The decision of the Appeals panel is final and will be given in writing within 14 days of the decision.
3. The Appeals panel will consist of,
  - a. A member of the 6<sup>th</sup> Form team
  - b. A Governor
  - c. A member of the Senior Leadership Team

The Appeals panel meeting will be clerked by a member of the school's administrative/finance team.

## **8. Payment**

- The school will use payment in kind wherever possible e.g. course materials, travel passes and meals
- Where payments in kind are not possible, the school will make use of BACS transfer for payment.
- Payments will be contingent on the student meeting targets for attendance and punctuality (see section 6 above).
- The payments will be made half termly, starting in October.
- Some of the money to cover an individual's curriculum-related activities such as field trips or special equipment may be held back.

## **9. Audit**

The fund should be audited in line with the school's standard audit procedures.

## **10. Administration**

5% of the Bursary Fund will be used to pay for the administration of the fund.

## **11. Monitoring and Review of the Bursary Fund**

A senior manager will oversee the operation of the Bursary Fund, and establish clear monitoring of its operations through the school management structure.

This policy, and its operation, will be reviewed by Senior Leadership Team/Governors at the end of each academic year to:

1. review the allocations and criteria for awards for the 16-19 Bursary Fund
2. monitor expenditure on a termly basis
3. track student retention
4. set and monitor Service Standards for claimant

**Queen Elizabeth's Girls' School 16-19 Bursary Fund Policy  
APPLICATION FORM – SEPTEMBER 2019**

Please complete each section listed below

**Section 1 Details of applicant and course**

**Section 2 Eligibility Priority**

**Section 3 How the funds will be used**

**Section 4 Bank or Building Society details**

**Section 5 Declaration by applicant**

**Section 6 Evidence**

**Section 7 (To be completed by the school)**

**PLEASE COMPLETE THIS FORM USING BLOCK CAPITALS**

<b>Section 1: Details of applicant</b>						
Surname/Family Name						
First names						
Date of Birth <small>Students must be aged under 19 on 31/08/19</small>						
Address						
Post Code						
Contact number						
School Year (Please circle)		Yr 12		Yr 13		Yr 14
Number of dependent children in the household						
Have you the right of abode and been resident in the UK for the last 3 years (see Section 3 of the Policy for more detail)	Yes			No		

## Section 2: Eligibility Priority

This section will ask you to indicate under which of the three agreed priorities for the allocation of funds you wish your application to be considered. You will also find information about what evidence you will be required to supply to support your application.

Please indicate with a cross in the box next to the description of your chosen priority and to confirm that you have provided the evidence required. **(Please put a cross next to one priority only.)**

### Priority 1:

I wish my application to be considered under Priority 1 (Vulnerable Bursary) “Young people in care, care leavers, young people in receipt of Income Support or Universal Credit and young people in receipt of Employment and Support Allowance or Universal Credit and Disability Living Allowance or Personal Independence Payments”.

In support of my application I enclose either:

- A. Written confirmation of my current, or previous, looked-after status from the Local Authority who looked after me, or who provided my leaving care services; or
- B. A letter from DWP confirming the benefit I am entitled to in my own right and confirming that I am able to participate in further education and training.

### Priority 2:

I wish my application to be considered under Priority 2  
**“Young people who are entitled to Free School Meal.”**

In support of my application I either:

- A. I authorise the Education Welfare Benefits Team, who administer Free School Meals, to verify this entitlement through their own records.
- B. If am a new student to the school I will complete a Free School Meals application form (these are available from the school office) and I will provide the documentary evidence as outlined on the application form.

### Priority 3:

**There is limited funding for the 16-19 bursary and it is unclear whether there will be sufficient funds to meet any demands beyond Priorities 1 and 2. Priority 3 applications will only be considered if funds allow.**

I wish my application to be considered under Priority 3  
“Young people whose household income is below £20,817 per annum.”

In support of my application I enclose the following information, either

- A. A copy of entitlement to means-tested state benefit, or Tax Credit Award Notice confirming household income of less than £20,817; or
- B. Evidence of income from self-employment, a P60, or 3 to 6 months’ worth of bank statements; or
- C. 3 most recent monthly award statements for Universal Credit.

**Section 3: How will the funds be used**

Please indicate in the table below details of how the bursary funds, if awarded to you, will support your continued studies/education. You may be asked to provide evidence of expenditure.

Please note that those students making an application under Priority 2 will not normally be eligible to claim funding for meals or transport as they should be entitled to receive a free school meal at the school, and to assistance with transport costs.

**(You may tick multiple boxes as appropriate)**

Transport

Tick if support required	Mode of transport	Distance from home to school in miles	Cost (specify time period e.g. per day, per week)

Subjects being studied				
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	Tick	Details	Estimated Cost
Books/equipment		<i>these will be calculated based on the subjects being studied</i>	-
Additional course costs, e.g. trips		<i>these will be calculated based on the subjects being studied</i>	-
£50 Book deposit		<i>this will be taken from the bursary fund allocation and is refundable at the end of year 13</i>	-
Clothing			
Meals			
Accommodation			
Exam re-sit or re-mark fees			
Travel to university interviews			
Other miscellaneous items – please specify			

**Section 4: Bank or Building Society Details**

The bursary will be paid direct to your bank account on a monthly basis subject to attendance and behaviour standards set out in the school's 16-19 Bursary Fund Policy.

To receive payments, you must have a bank account in your name that will accept BACS payments. If you do not have a bank account, you need to open one before completing this form.

Name of Account Holder	
Name of Bank	
Branch	
Sort Code	
Account (or Roll) Number	

**Section 5: Declaration by Applicant**

- I declare that the information on this form is true and accurate to the best of my knowledge.
- I have made this claim for a bursary payment, fully aware that any false statements can lead to withdrawal/refusal of any financial support and may lead to me being prosecuted.
- I understand that if I refuse to provide information which may be relevant to my claim, the application will not be accepted.
- I am not currently in receipt of a 16-19 bursary from any other provider.
- I understand that monies I receive under the 16-19 bursary scheme will be paid on condition of standards of attendance, punctuality and behaviour, as explained in the 16-19 Bursary Fund Policy – Section 6.
- **HOLIDAYS WILL BE UNPAID.**
- I will attend regularly and complete the course for which my bursary is supporting me.
- When changes to my household financial circumstances occur (which may result in changes to my claim), I confirm will notify the school immediately.
- I will notify the school immediately with any changes to my Bank/Building Society details.
- I understand that monies I receive under the bursary scheme have been awarded to provide me with financial support to allow me to continue in learning, and if I leave learning all financial support will stop.
- I understand that I do not have an automatic entitlement to bursary payments, and all payments are based on the information I have provided.
- I am clear that the bursary payments I receive are to provide me with the means to remain in learning and are to be used for items such as: books, equipment, travel costs, meals, additional costs, i.e. trips, miscellaneous course costs.
- I understand I have the right to appeal if I disagree with the outcome of my bursary application. This appeal should be made to QEGS as set out in Section 7 of the 16-19 Bursary Fund Policy.

Student Signature		Date	
Parent/Guardian Signature		Date	

## Section 6

### Students Income to evidence Priority 1 and Priority 2 Funding

Please indicate which of the following benefits/income **you** are currently in receipt of. Please send a copy of ONE of these as evidence of your income.

Type of Income	Evidence required	Tick if included
Income Support	An award letter which is less than 3 months old on the date of application	
Income based Employment and Support Allowance (ESA)	An award letter which is less than 3 months old on the date of application	
Universal Credit payments	An award letter which is less than 3 months old on the date of application	
Personal Independence payments	An award letter which is less than 3 months old on the date of application	
Free School Meals	If you are new to the school you should supply an award letter which confirms that Free School Meals were received in Year 11 and then complete a Free School Meals application form (available from student services)	
	If you attended QEGS, tick here to give consent for the Education Welfare Benefits Team, who administer Free School Meals, to verify this entitlement through their own records	

### Household Income to evidence Priority 3 Funding

Please indicate which of the following benefits/income that **your parents/carers** are currently in receipt of, which demonstrates you have a household income of less than £20, 817 p.a. Please send a copy of ONE of these as evidence of your income.

Evidence required	Tick if included
A copy of entitlement to means-tested state benefit	
Tax Credit Award Notice for 2018/19 confirming household income of less than £20,817	
Evidence of income from self-employment, a P60, or 3 to 6 months' worth of bank statements	
3 most recent monthly award statements for Universal Credit	

Parent/Carer Detail (please complete details of all adults responsible for the applicant within the household)	Relationship to Applicant

Surname/Family Name	
First names	

**Section 7: For completion by the school**

I confirm that this applicant meets the residency criteria under which a bursary may be paid. I confirm that this applicant is enrolled on a programme of study under which a bursary may be awarded. I confirm that the expenditure detailed in Section 3 is relevant and appropriate for the programme of study being followed by this applicant. I confirm that for Priority 3 that the School has reviewed the appropriate household income to confirm suitability.

Tick if priority criteria are met with supporting evidence provided

Priority 1	<input type="checkbox"/>	Priority 2	<input type="checkbox"/>	Priority 3	<input type="checkbox"/>
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Number of dependents in household	<input type="text"/>
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Support required	Tick	Amount
Books/equipment	<input type="checkbox"/>	
Additional course costs, e.g. trips	<input type="checkbox"/>	
Transport	<input type="checkbox"/>	
Clothing	<input type="checkbox"/>	
Meals	<input type="checkbox"/>	
Accommodation	<input type="checkbox"/>	
Exam re-sit or re-mark fees	<input type="checkbox"/>	
Travel to university interviews	<input type="checkbox"/>	
Other miscellaneous items	<input type="checkbox"/>	
Total		

Signed		School Stamp	
Name			
Position			
Date			

<b>Priority 3 Household Income Review</b>	£
Confirmed Earnings as an Employee	
Working Tax Credit	
Child Tax Credit	
Total (to be less that £20,187)	