

INVICTUS

Education Trust

**16 – 19 BURSARY FUND
POLICY**

Approved by Board of Directors
September 2018

To be reviewed by Board of Directors
September 2019

What is the 16-19 Bursary Fund?

The fund is made available from the Government through its funding body – Education Skills Funding Agency (ESFA) for 16-18 year olds - to provide assistance to students whose access to, or completion of, education is inhibited by financial constraints or barriers. The policy has been developed to ensure that all students are treated in a fair and consistent way.

Who is eligible to apply for 16-19 Bursary Funding?

Students following Government (ESFA) funded full time or part-time courses, who are 16 years and over, meet the residency qualifications and satisfy one or more of the following criteria:

- Students aged at least 16 and under 19 years of age on 31st August 2018 in the academic year in which you start your studies. Who are in care; are leaving care; are in direct receipt of Income Support or Universal Credit in their own name; or are in receipt of both Employment Support Allowance and Disability Living Allowance or Personal Independence Payments.
- Students who are economically or socially disadvantaged and at risk of not taking up or continuing in their education. This group includes students with physical or other disabilities, medical conditions and/or learning difficulties
- Students who have been in care, or probation, are young parents or are otherwise considered at risk
- Students who are asylum seekers
- Students who are Refugees (who will have access to 16 -19 Bursary Funding if they are in receipt of support evidence)
- Students who are lone parents
- If your total household income is below £20,000 you will be eligible to a full bursary award and if it is between £20,000-£25,577 you will be eligible for a partial contribution bursary award. Evidence of household income will be required and payment will be based on both attendance and academic performance.
- Further funding can also be requested for eligible items intended to support your studies such as:
 - Books/Materials/Equipment
 - Required trips, visits and field courses
 - UCAS fees and University open day visits
 - Other items relevant to the individual student

Proof of income

Proof of evidence will be required to support this application and may include:

- Proof of parental eligibility for Free School Meals
- Taking account of household income as evidenced by receipt of benefit and or/P60, Tax Credit Award
- Notice or evidence of self-employment income. Unearned income (shares, investments, and savings) may be taken into account when assessing awards.
- Proof of disability allowance
- Certified letter from the DWP

- Other means tested certification

How to Apply

Complete the following forms and return them to school office for the attention of School Finance Officer or Head of Sixth Form. Please ensure that you attach the required evidence.

- Bursary Application Form – Appendix 1 or 2
- Student Bank Details Form

How will the Academy assess applications and allocate 16-19 Bursary funding?

The 16-19 Bursary Fund is a limited fund and the Academy will prioritise allocation. There will be two priority groups, categorised as vulnerable and discretionary.

The Bursary Fund Committee will normally meet every term to consider and review applications. Emergency meetings may need to be called.

The Bursary Fund Committee will be made up of Director/Head of Sixth Form, Finance Officer & Sixth Form Secretary.

The Committee will take into account about a student's circumstances, well-being, behaviour, progress and attendance.

Payments to Students

Payments are made via BACs into the Students Bank or Building Society Account. Students will not be eligible for payment if their attendance falls below 90%

Students and their parents/carers should understand that the available fund is limited. Any appeals against decisions can be made to the Chair of Governors, via the Clerk to the Governor Body who will follow Trust's Complaints Policy and Procedures

How to claim refunds/payments for Goods/Service

The student will be required to complete a 16-19 Discretionary Bursary Fund Application Form (Appendix 2).

- If the student is claiming a refund they will be required to attach receipts/proof of purchase to the form and refunds will be paid by BACS direct to the student's bank account.

Or

- By completing the request form the school will purchase the goods/services directly on the student's behalf.

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16 – 19 BURSARY FUND FOR POST 16 STUDENTS APPLICATION FOR SUPPORT ACADEMIC YEAR 2018/2019

Full Bursary – for Look After Students, those in care, care leavers, students receiving Income Support or Universal Credit in their own name and disabled students in receipt of both Employment Support Allowance and Disability Living Allowance (or Personal Independence Payments)	
Name:	School:
Tutor Group:	Year Group:
Home Address:	
Telephone Number:	
Email Address:	
I wish to claim support from the 16 – 19 Bursary Fund, and I provide the following information as evidence of my personal circumstances (please tick below)	
Written Local Authority Evidence	<input type="checkbox"/>
HMRC Evidence such as Tax Credits	<input type="checkbox"/>
Employment Support Allowance	<input type="checkbox"/>
Disability Living Allowance or Personal Independence Payments	<input type="checkbox"/>
Other please specify:	<input type="checkbox"/>
Declaration – I confirm that I have read the 16 – 19 Bursary Policy and the information provided on this form is correct. I confirm I will inform the Head of Sixth Form of any changes to my personal circumstances.	
Student Signature:	Date:
Parent/Guardians Signature:	Date:
Office Use: I can confirm that I have seen evidence to support this application and have placed copies in the students file.	
Funding Approved by:	Date:
Input on System by:	

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16 – 19 DISCRETIONAL BURSARY FUND APPLICATION FORM 2018/2019

Discretionary Bursary for students from lower income households. There are 2 bands of eligibility for this bursary. Full Bursary – Household Income below £20,000. Partial Bursary – Household Income between £20,000 - £25,577	
Student Name:	School:
Tutor Group:	Year Group:
Below please detail what Financial Support you need and the costs that are applicable. Claim for reimbursement must not be more than 3 months old and all receipts must be included with the claim form	
Details	Costs
Total Funding you need	£
You will need to provide proof of household income levels with either a P60 or HMRC documents such as Tax Credits.	
Declaration – I confirm that I have read the 16 – 19 Bursary Policy and the information provided on this form is correct. I confirm I will inform the Head of Sixth Form of any changes to my personal circumstances.	
Students Signature:	Date:
Parents Signature:	
Office Use: I can confirm that I have seen evidence to support this application and have placed copies in the students file. Evidence of receipts must be retained for Audit purposes to verify payment.	
Funding Approved by:	Date:
Input on System by:	Date:

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16 – 19 BURSARY FUND STUDENT BANK/BUILDING SOCIETY DETAILS

Student Name in Full:								
Name of Bank/Building Society:								
Bank/Building Society Address:								
Account Holders Name:								
Account Holders Address:								
Account Number:								
Sort Code:								
<p>Note if your application for Bursary Funding is unsuccessful these Bank/Building Society Account details will be confidentially destroyed/shredded. If your application for Bursary Funding is approved then the payment will be made into the account above and this form will be retained as evidence on school finance system.</p>								