

# Greater Manchester Education Trust

## 6<sup>th</sup> FORM BURSARY POLICY

V1.0

### Approval History

Approved By:	Date of Approval	Version Approved	Comments
Finance and Audit Committee	3 <sup>rd</sup> July 2023	V1.0	New Policy for Trust – Parrswood and Whalley Range High School

### Revision History

Revision Date	Previous Revision Date	Summary of Changes	Owner/Editor

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## **1.0 Statement of intent**

At Greater Manchester Education Trust, we are committed to closing the attainment gap between students from disadvantaged and more advantaged backgrounds, and ensuring that every young person participates in, and benefits from, a place in 16-19 education and training. The bursary is intended, therefore, to help eligible students with the essential costs of their studies, e.g., important books, equipment, and travel costs.

We are dedicated to:

- Distributing 16-19 bursaries via a fair and equal process that is transparent, accountable, and easily understood.
- Ensuring that information regarding the application, award, and administration of 16-19 bursaries is publicly available via the school website and sixth form administrator.
- Widening access to, and participation in, 16-19 education and training.
- Monitoring and reviewing our policies to ensure effectiveness.
- Setting high targets and objectives to develop a culture of continuous improvement.
- Ensuring adequate resources are available to implement policies, as much as is reasonably practicable.
- Sharing and acquiring best practice through partnerships with neighbouring establishments.

## **2.0 Legal framework**

This policy has due regard to all relevant legislation and statutory guidance including, but not limited to, the following:

- ESFA (2023) '16 to 19 bursary fund guide 2023 to 2024 academic year'
- Equality Act 2010

This policy operates in conjunction with the following school policies:

- Complaints Procedures Policy
- Attendance and Absence Policy
- Behaviour Policy
- Data Protection Policy

## **3.0 The schools' responsibilities**

Schools with 16-19 provision will be responsible for setting eligibility criteria for students at the institution and will set conditions for receiving the bursary, such as regular attendance. Arrangements for applying for bursaries will be straightforward and confidential.

The needs of each student who applies for the bursary will be assessed by the school and evidence will be obtained to support each application. The school will claim vulnerable bursaries from the Student Bursary Support Service (SBSS) for each eligible student.

Records will be kept by the school of all assessments and payments. The application process will maintain confidentiality.

GMET will make this policy available early enough for students to be able to use the information when deciding which post-16 provision to attend.

Schools with 16-19 provision will comply with the requirements of the Equality Act 2010 when setting its criteria and will not discriminate against students because of their protected characteristics.

The schools with 16-19 provision will inform the ESFA of the total amount of any unspent funds (not previously reported) from any year up to and including the 2021/2022 academic year, by completing the ESFA online enquiry form no later than 31 March each year.

The school will ensure it completes the new individualised learner record (ILR) or census fields to provide data on the number of students participating in extended work placements.

#### **4.0 Raising awareness and take-up of the 16-19 bursary fund**

To raise awareness of the bursary, schools will employ different marketing activities, including the following as appropriate:

- Posting information about the bursary on the school website and in the prospectus, as well as on posters around the school
- Distributing information at open evenings for Year 11 pupils
- Providing students who attend a pre-enrolment interview with a brochure which includes information about the bursary and directs them to the school's website
- Providing further information, such as the application form and details of the bursary, following enrolment for all new entrants to the school in an enrolment pack, as well as a text message and email about the bursary at the start of the academic year
- Working with local support services to target potential students who are homeless and providing them with the necessary information
- Providing tutors with information to inform discussions between tutors and students
- Working with social workers, who help the most disadvantaged students, to identify those who may be eligible for vulnerable groups
- Sending text messages throughout the year to inform students of the financial support available – in the summer term, text messages are sent to inform students that the application form can be downloaded and completed

To identify students who may be eligible for vulnerable group bursaries, the schools will work with the LA, LAC education services and care leaver services to help and encourage students to apply for the bursary.

In addition, the schools will work with the LA to establish local data-sharing agreements to share information about which students may be eligible and who should be supported to make an application.

The schools will work with local stakeholders to identify eligible students for vulnerable groups by:

- Including information on the bursary within bulletins to social workers, published three times a year.
- Appointing an inclusion manager who develops links with local agencies working with vulnerable people, e.g., social services, to identify eligible students before enrolment.
- Developing networks with foster parents, schools, asylum support teams, youth offending services and health services.

The school will use the Key to Success website to establish whether students were in receipt of the pupil premium funding in Year 11 or received SEND support, which may indicate whether they are eligible for a discretionary bursary. The school will proactively approach identified students to see if they require support.

The school will ensure that, in any marketing materials and the application form, procedures for how the institution maintains confidentiality are outlined to encourage more students to apply for the bursary.

## **5.0 Bursary fund statement**

A bursary fund statement will be published every **September** on **the school website**. The bursary fund statement will outline the following:

- How the school will use its funding
- The eligibility criteria for the bursary
- Terms and conditions for receiving the bursary, e.g., attendance and behaviour requirements
- The type of support offered through the bursary, e.g., with transport, books, and equipment
- Whether the bursary fund contributes to other costs, e.g., attending university open days and interviews
- A statement explaining that the support available to students is from the bursary fund

## **6.0 Eligibility**

Students who are aged 16 or over and under 19 years old on 31 August before the academic year in question may qualify for bursaries for that academic year.

Students aged 19 or over will be able to receive a bursary if they are continuing on a study programme, they began aged 16 to 18, or if they have an EHC plan, provided they remain eligible and the school determines they need the support to continue their participation.

Students aged 19 or over will not be eligible for bursaries for vulnerable groups.

The school will only pay bursaries to students aged 16 or over, unless in exceptional circumstances, e.g., where a student is following an accelerated study programme. The school will use its discretion to decide whether a student under the age of 16 is eligible – this is explained further in the ‘Discretionary bursaries’ section.

Students on apprenticeship programmes, or any waged training, are considered to be employed rather than in education – as such, they will not be eligible for the bursary.

Non-employed students aged 16-19 who are participating in a Prince's Trust Team Programme will be eligible to receive the bursary in the same way as any other student.

Students on distance learning provision will not likely need help from the bursary, but in instances where they require financial help, the school will provide support in-kind, e.g., a temporary travel pass to attend exams.

Students will be permitted to apply more than once if their circumstances change. In this case, they will be reassessed, including a one-to-one interview to determine if there are any exceptional circumstances to consider.

Most students who receive a bursary will get a tailored award from the discretionary bursary. Students in need of more support will be permitted to apply for a vulnerable bursary.

Students must be participating in provision that is subject to inspection by a public body which assesses quality, e.g., Ofsted. The provision must also fall into one of these groups:

- Funded directly by the ESFA or by the ESFA via an LA
- Otherwise publicly funded and leading up to a qualification (up to and including level 3) accredited by Ofqual or on the ESFA list of qualifications approved for funding 14- to 19-year-olds

## **7.0 Young offenders**

Students convicted or cautioned for a criminal offense, i.e., young offenders, will be able to apply for a bursary if they:

- Are serving a non-custodial sentence.
- Have been released early from a custodial sentence, except on temporary license.
- Have been remanded to a non-secure institution.

As with all bursaries, the school will provide in-kind support to young offenders rather than cash payments wherever possible.

## **8.0 Discretionary bursaries**

For the 2022/2023 academic year, the ESFA relaxed the requirement for settings to ensure that students are eligible for the discretionary bursary in each year they require support. This rule has been retained for the 2023/2024 academic year. Schools continue to be free to determine whether they carry out checks annually, or just once at the beginning of a student's study programme. Where a decision is taken to not undertake annual checks, a signed and dated self-declaration form (paper copy or



electronic) must be obtained from the student to confirm that their household circumstances are unchanged.

The school will ensure that discretionary funding is allocated to the students who are most in need of financial support. The schools' eligibility criteria for receiving a discretionary bursary will include:

- Students who are completing a high-cost course (over £2,000) in which specialist equipment and clothes are required, including industry placements.
- Students living in a low-income household.
- Students who are from a single parent family or have one or more dependent siblings in their family.
- Students who have additional responsibilities, such as being a young carer or parent.
- Students who travel greater than **eight** miles to the school.

Discretionary bursaries may be awarded for students in low-income households. The school will use household income, in some way, to help establish the amount of support awarded to a student, if possible.

The amount awarded will be dependent on the amount of income – this will be allocated on different levels.

Students who apply will be assessed individually. This assessment will be documented, and evidence to support the claims will be obtained and retained for auditing purposes.

The assessment will be based on a student's financial needs and the school will consider any unearned income, such as shares or investments, savings, and rental income.

The school will not make blanket or flat-rate payments to all students or students in the income bands outlined above without considering the actual needs of each student and this is being phased out in the settings.

The school will use in-kind payments over cash payments for discretionary bursaries wherever possible.

The school will manage the discretionary bursary to keep payments within budget. Where possible, the school will retain a small emergency fund from its allocation to support students who face exceptional circumstances during the year due to a change in their situation that impacts on their ability to participate in education – evidence of a student's eligibility for emergency funds, the individual assessment and their actual participation costs will be held for audit purposes as for any other bursary award.

In individual cases of severe hardship, the bursary fund will be used where appropriate to provide food support for a student on the days they attend their programme of study. Food support will be provided where the school believes the student to be in real need

and will not require checks on household income or other evidence-gathering that would usually be required.

Where food support is provided, copies of the following records will be retained for audit purposes:

- The total number of students provided food support
- The number of days this support is given to each student
- The total value of support given to each student along with the rationale for its provision
- Signed confirmation of receipt funding by the student or actual spend receipts

Each school should exercise their discretion in each case as this scheme is not intended to continue on an ongoing basis for any individual pupil. This flexibility relates to food support only.

## **9.0 Vulnerable bursaries**

The schools' eligibility criteria for receiving a vulnerable bursary will include students who are:

- LAC (this includes those classed as an unaccompanied asylum-seeking child).
- Previously LAC (PLAC).
- Receiving Income Support or Universal Credit because they are financially supporting themselves and/or someone who is dependent on them and living with them, such as a child or a partner.
- Receiving Disability Living Allowance or Personal Independence Payments in their own right, as well as Employment and Support Allowance (ESA) or Universal Credit in their own right.

Via the application form, the school will remind parents that they will not be able to continue to claim Child Benefit if the student successfully applies for ESA.

Students who are in one or more of these categories will be able to apply for a vulnerable bursary of up to £1,200.

Where a vulnerable student is on a course lasting 30 weeks or more and is participating full-time, they will be eligible to receive up to £1,200; students on study programmes of less than 30 weeks will receive a pro-rata amount. The school will consider the number of hours involved in eligible students' study programmes when deciding if a pro-rata payment is more appropriate.

The school may pay a student in a vulnerable group more than £1,200 if it believes the student needs extra help to remain in education; the extra payment will be paid from the school's discretionary bursary allocation or its own funds. The rationale for such a decision will be included as part of the school's auditable records.

The school will only pay students the amount they need to access education, based on individual assessment. Students will not automatically receive £1,200 or a set amount of funding unless this is in line with their actual financial need.

Proof will be needed to evidence that a student is eligible for the bursary, for example:

- **LAC or PLAC:** written confirmation, such as a letter or an email, of current or previous LAC status from the relevant LA (the LA that looks after them or provides their leaving care services)
- **In receipt of Income Support:** a copy of the Income Support award notice, which must evidence that the student is entitled to the benefit in their own right, and confirm that the student can attend FE or training
- **In receipt of Universal Credit:** copies of the Universal Credit award notice from the last **three months** to estimate assumed income for the year which must evidence that the student is entitled to the benefit in their own right, as well as additional documentation to confirm their independent status, e.g., a tenancy agreement in the student's name, a child benefit receipt, children's birth certificate, or utility bills
- **In receipt of Universal Credit or ESA and Disability Living Allowance or Personal Independence Payments:** a copy of the Universal Credit or ESA award from the Department for Work and Pensions (DWP), as well as evidence of receipt of Disability Living Allowance or Personal Independence Payment

The school will only submit a funding claim to the SBSS once sufficient evidence has been provided and the school has confirmed that the student needs financial support to participate.

The institution will be responsible for assessing whether students are eligible to receive a vulnerable bursary.

The institution may decide that, although a student may be eligible for a bursary, as they fall within one or more of the vulnerable groups, the bursary is not required as they do not have any financial need and do not need further support. If financial needs are already met and there are no other costs or they do not require the maximum award, the institution may decide not to allocate a bursary to the student – for example, where:

- A student attends specialist residential provision that covers their education costs in full.
- A student undertakes a distance learning programme and there are no financial barriers to participation, e.g., no travel or food costs.
- A student is in LA care and education costs are covered in full by the LA.
- A student is financially supported by their partner.

Where the school decides that a student is ineligible for funding in accordance with the above criteria, the school will explain to the student and/or the student's parents

the aim of bursary funding and why it is appropriate to not award any in this instance **during a face-to-face meeting, followed by written confirmation.**

If a student or the student's parents still want to claim a bursary for vulnerable groups, they must inform the school. The school will then consider the particular circumstances in each case and assess whether:

- No bursary should be awarded, as the student has no financial needs; or
- A reduced bursary should be awarded, as the level of financial help needed is limited.

The school will ensure its bursary application form is clear about the possibility of no award or a reduced award.

## **10.0 Paying bursary funding to eligible students**

The school will aim to pay all funding in-kind, using cash payments only where necessary.

Payment in-kind may include, for example, travel passes, vouchers or credits for meals, or required books or equipment.

Where in-kind payments are given to students within vulnerable groups, the school will explain the value of these payments to the student and how these have been deducted from the total £1,200.

Where payments are made to students, rather than in-kind, the funding will be paid by BACS transfer to the student's own bank account.

Payments will not be paid into another person's bank account unless exceptional circumstances mean that a student is unable to administer their own account. If a student cannot manage their own funds, the school will consider who will manage the bursary on the student's behalf.

The school has the right to determine how often payments are made – when doing so, the following will be considered:

- The reason the bursary was awarded
- The student's circumstances
- Local arrangements

The school has the right to insist that students only spend bursary payments on the support that has been identified as necessary to help them access education, e.g., to pay for travel costs.

The school will adhere to good practice guidelines to make regular payments to students on **weekly or termly** basis.

The school will not pay bursaries to students in large or lump sums.

In order to decide how best to use individual students' bursary funding, the school will employ the following procedures:

- Every student who qualifies for a bursary is offered an interview with a financial support advisor to decide the best way to allocate their support
- Priority areas are addressed first, including travel to the school, equipment costs and support with studies
- Students are allocated a higher amount of funding at the beginning of their course to address the priority areas
- A percentage of the funding is kept back as a hardship fund to respond to any emergencies that may arise during the year – the total amount held is discussed with the student during the initial interview
- The student services team meet with individual students on a **monthly** basis to help them with budgeting

If students or their parents have any queries about payments, they should contact the SBM on **email address** or **phone number**.

The school may use up to 5 percent of its allocation from the ESFA for administrative costs.

## **11.0 Conditions for receiving bursary funding**

Receipt of a vulnerable or discretionary bursary will be conditional on the student meeting the agreed standards set by the institution.

The conditions of payment will be clear and accessible to students, as well as being thoroughly explained as part of the induction process.

Evidence that the student has seen and agreed to the conditions will be kept for audit, such as an agreement signed by the student, in accordance with the 'Student declarations' section.

Students in receipt of bursaries must have **85** percent attendance at timetabled lessons unless the absence is authorised. Consideration will be given to the impact on attendance that might be caused by illness, caring responsibilities, or other exceptional circumstances.

In line with the school's Attendance and Absence Policy, students that are absent due to sickness will be expected to present a note from a qualified medical practitioner if their absence is longer than **three** days.

Vacation breaks outside timetabled school holiday times are not permitted.

Students in receipt of bursaries will be expected to abide by the Behaviour Policy of the school.

Where there are concerns regarding a student's attendance or behaviour, the school will discuss the issue with the student and consider individual exceptional circumstances before withholding any payments. In all cases, sanctioning will not occur to the extent a student's ability to attend education is undermined.

The school will ensure that all parents and students are aware of the possible impact that attendance may have on payments, outlined in the application form.

The school will stop payments where a student has been absent for a period of four consecutive weeks or more, excluding holidays, and where a student withdraws themselves from a study programme.

Money may be taken back from students if it has not been spent for the reasons it was awarded to them. Before doing so, the school will always consider the impact of this on the student.

The school may specify that students return any books and equipment purchased for them through the bursary, such as a laptop, at the end of their study programme for use by other students. This will be clearly communicated to students and their parents upon confirming eligibility for the bursary.

The school will require receipts for expenditure, where appropriate, to confirm that funding is being used for the reason it was awarded. For standard weekly costs, e.g., travel and food, receipts will not be collected for each transaction, and will instead be evidenced initially by receipts and then paid afterwards linked to attendance. Students may be asked at various points in the year to provide further receipts. For one-off or infrequent costs, receipts will always be collected. In all cases, students will not be asked to incur expenditure and provide a receipt prior to receiving funding – payment will be made first and a receipt provided afterwards, as necessary.

The school will highlight to students and parents the impact of receipt of the 16-19 bursary fund on other benefits. This includes information that:

- Receipt of bursary funding will not impact the receipt of other means-tested benefits paid to families, e.g., Income Support.
- Receipt of Disability Living Allowance or Employment Support Allowance will mean parents can no longer receive certain benefits for that child, e.g., Child Benefit.

## **12.0 Recycling bursaries**

The school will be able to recycle unused funding for bursaries for vulnerable groups, e.g., if a student leaves early after only receiving part of their bursary (until 30 April 2024).

Where the school has accrued funds as specified above, it will use these funds for another student, rather than claiming for the full £1,200, e.g., if a student left and £700 was unspent, the school will only claim £500 towards another eligible student.

If the school has sufficient funds to cover the costs of a full bursary (£1,200), it will submit a funding claim showing a value of zero to the SBSS and use the amount to fund the new student.

If the school decides that a student is in one or more of the defined vulnerable groups, but does not have any actual financial need, it will submit a funding claim showing a zero amount.

The school will be able to add any funding for bursaries for vulnerable groups it has claimed, but no longer needs, for eligible students for discretionary bursaries (from 1 May 2024). Funds will be allocated in this way on a case-by-case basis after assessing

Please note that settings that receive a single overall allocation, which includes funding for both FSM and the discretionary bursary, funds can be carried forward from both schemes and can be used for either FSM or discretionary bursary payments in the new academic year. The school will consider carrying forward any unspent funds to the next academic year, but not for more than one year – any carried funds will only be used to support students in line with this policy and will not be added to general funds. Unspent funds carried forward will be used before using the school's new academic year allocation.

If the school has no other students who are eligible for a bursary for vulnerable groups and funds have been claimed in error, it will contact the ESFA and arrange to return the funds.

### **13.0 Student declarations**

Students and/or their parents will sign a declaration when they apply for either a vulnerable or discretionary bursary, confirming that any evidence given in support of the application is correct.

By signing the declaration, the student and their parents are agreeing to all the conditions and eligibility criteria.

The school will retain copies of the declaration and supporting documentation for six years – this includes:

#### **For vulnerable groups:**

- A copy of the funding claim sent to SBSS.
- Evidence showing that the student is eligible, in line with this policy.
- Evidence of payments received from the SBSS, e.g., bank statements.
- A copy of the student's individual assessment of actual financial need.
- Evidence of payments made to the students.

#### **For discretionary bursaries:**

- Evidence used to assess eligibility, as outlined in the ‘Discretionary bursaries’ section of the policy.
- A copy of the student’s individual assessment of actual financial need.
- Receipts for purchases made, e.g., bus pass, lunch receipts or book receipts.

All data will be handled confidentially and stored securely in line with the Data Protection Policy.

#### **14.0 Managing applications**

The school will use its own application form or online platform for the bursary fund.

The application form will capture all the relevant information needed to assess the application in line with this policy, including:

- Household income.
- The student’s actual financial needs to support their participation.
- Specific deadline dates.
- The student’s signature indicating they have seen and agreed to the terms and conditions of the funding and that all information provided is accurate.

All applications for the 16-19 bursary will be submitted by **31<sup>st</sup> October** of each year wherever possible, to allow the school to correctly and fairly assess overall demand and distribute discretionary awards. The school will not, however, implement a cut-off date for applications, in recognition that some needs may arise throughout the academic year.

The date for applications to be submitted will be outlined in the bursary fund statement, the bursary application form, and any marketing materials.

Application forms and marketing materials will outline that students who meet the criteria for bursaries for vulnerable groups are not automatically entitled to receive them, e.g., if they do not have any financial needs or these needs are covered by alternative means.

#### **15.0 Quality assurance**

The school will use the ESFA’s ‘16 to 19 Bursary Fund Checklist’ to confirm which documents have been provided for each student, as outlined in the ‘Student declarations’ section – these relate to the following:

- The application process
- The decision to award the specified amount of bursary
- The funds that have been issued to the student



The school will maintain written records of the following:

- The number of applications received
- The value of all bursaries awarded
- The purpose of all bursaries awarded
- Which applications qualified for the bursary and which did not
- Brief descriptions of the institution's justification for any decision to award a bursary or not

The school will retain copies of any documents the student has signed to give formal agreement to their conditions for payment, as well as any others mentioned in this section, for six years.

## **16.0 Fraud**

The school will be responsible for investigating any suspected instances of fraud relating to bursary fund applications.

Students and their families will be informed that providing false or incomplete information that leads to incorrect payments or overpayment may result in a referral to the police with the possibility of the student and/or their family facing prosecution.

If evidence comes to light that supplied information is misleading or fraudulent, the school will stop any further payments and will attempt to recover any payments already provided to the student.

Where significant fraud is identified, the school will report this to the ESFA. Significant fraud involves one or more of the following:

- The amount of money is in excess of £1,200
- The particulars of the fraud are novel, unusual, systematic, or complex
- There is likely to be great public interest due to the nature of the fraud or the people involved

## **17.0 Conditions for using the bursary**

The bursary fund will not be used by the school for any reasons which would give it a competitive advantage over other schools, such as:

- Enrolment or administration fees imposed by the school.
- Fees for access to facilities in the school.
- Block subsidy of the canteen.
- Block subsidy of transport.

- Block provision of equipment, material, or books.
- Bonus payments to reward attendance or achievement.

Block payments to students for attendance, irrespective of their actual financial need, will not be paid.

The bursary fund will only be used for supporting students who have a genuine financial difficulty which might prevent them from continuing in education, rather than acting as an incentive for attendance.

## **18.0 Complaints and appeals**

All complaints and appeals must be made in writing in accordance with the Complaints Procedures Policy.

If the complaint or appeal concerns operational processes or customer service for a vulnerable bursary funding claim, the SBSS will deal with the case. If the case is not resolved following this, it will be passed to ESFA.

The school will act as a first point of contact for students who have complaints and will support students as much as possible throughout the complaint's procedure.

Complaints made regarding the school and the school's provision of support will be dealt with in accordance with the procedure set out in the Complaints Procedures Policy.

## **19.0 Monitoring and review**

This policy will be reviewed annually by the Chief Finance and Operations Officer in consultation with the sixth form leads in schools. The next scheduled review date is **June 2024**.

The school will ensure that this policy is implemented correctly and appropriately at all times.

The school will communicate any changes to this policy to all staff and relevant stakeholders.