



HAGLEY CATHOLIC HIGH SCHOOL

16-19 Bursary Fund Policy and Guidelines 2019-20

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1. Introduction

- 1.1** 16-19 Bursary Funds are paid by the Education Funding Agency (EFA) to schools and colleges so that they may provide financial help to students whose access to, or completion of education might be inhibited by financial consideration.

They may typically be used for:

- Transport
- Books and equipment (*on production of receipts*)
- Hardship costs
- Additional course costs (Residentials)
- Costs of travel to HE interviews
- Exam fees (*including re-sits*)
- Other discretionary costs.

2. Policy Aims

- To ensure that the 16-19 Bursary Fund is administered in accordance with DfE/EFA guidelines and policies.
- To explain the roles and responsibilities of staff and students.
- To explain the procedure for making applications.
- To explain the appeals procedure.
- To ensure that the Academy Committee receives appropriate reports on the administration of the 16-19 Bursary Fund.
- To describe the eligibility criteria, how the bursary is calculated and payment processes.

3. Criteria and Eligibility for 16-19 Bursary Funds

Details of the criteria to be used and the eligibility for payments are shown in **Appendix 1**.

4. Responsibilities

4.1 Student

- Students making applications undertake to provide accurate information and appropriate documentary evidence where needed.
- Students in receipt of an award should comply with school rules and regulations, as detailed in the Home-School Agreement.
- Students must inform the School of changes in their financial circumstances as soon as they occur.

4.2 Sixth Form Administrator – Mrs S Elcock

- Provides advice and guidance to students on bursary entitlement.
- Assists students in completing application forms, ensuring that the appropriate documentary evidence is attached.
- Logs all bursary applications and submits completed application forms to the Bursary Fund Manager.

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- Oversees termly reviews on specified dates to ensure conditions are being met and notifies students and Bursary Fund Manager accordingly.

4.3 School 16-19 Bursary Fund Manager – Mrs J Jones

- Oversees the administration of the fund.
- Makes decisions on applications, in conjunction with a member of the Senior Management Team.
- Ensures that reasons for Panel's (see 4.4) decisions are accurately recorded.
- Acts as the first point of contact to receive any appeal.
- Liaises with Finance Clerk to ensure timely payment of Bursary funds.
- Liaises with Finance Clerk to ensure that audit requirements are met.
- Produces reports on administration of fund for Academy Committee.
- Ensures that fund is publicised in an appropriate manner.

4.4 16-19 Bursary Fund Panel

- This will consist of the Bursary Fund Manager and one Senior Manager (Mrs Morris – Director of Sixth Form).
- The panel will consider each application and ensure that awards are granted fairly and equitably in accordance with the fund guidelines.

4.5 The Appeals Panel

- Consists of a Senior Manager (Mrs K Morris) involved in the original decision plus the Principal, Mrs S Horan.
- Considers any appeals not resolved by the Bursary Fund Manager.

4.6 Finance Clerk

- Ensures funds are paid to students in accordance with the decisions of the panel.
- Administers the cash-flow in accordance with audit and EFA requirements.
- Liaises with Bursary Fund Manager to ensure that audit requirements are met.

4.7 Governing Body (Academy Committee)

- Receives report from Bursary Fund Manager – detailing the take-up against the criteria used and a financial analysis of the expenditure.

5. Bursary Application Procedure

5.1 Before making an application, students must arrange to see the Sixth Form Administrator, Mrs Elcock, who will guide them through the application process, give advice on the sort of expenses that can be claimed for and explain the documentary evidence required. The Sixth Form Administrator will play no part in assessing the viability of the claim.

5.2 Applications are logged by the Sixth Form Administrator before forwarding to the Bursary Fund Manager. **Note: a date for submission is set at the beginning of the academic year so that claims can be considered together. However, new applications can be submitted at any point throughout the academic year.**

5.3 The Bursary Fund Manager organises a meeting of the Bursary Fund Panel. The panel will consider each claim and make a decision in accordance with the fund guidelines.

5.4 Application forms are then sent to the Finance Clerk who will confirm with the Sixth Form Administrator that the student is meeting the attendance condition before releasing the appropriate payment to each student. In cases where payment is made to a third party (e.g. transport) it will be the responsibility of the Finance Clerk to ensure that this occurs. The Finance Clerk will retain all application forms on file for 6 years.

5.5 This procedure is illustrated in the Bursary Application Process Flow Chart (**Appendix 2**).

6. Appeals Procedure

6.1 Students who consider that their claim has been inappropriately assessed should appeal, in writing, to the Bursary Fund Manager within 4 weeks of the Panel decision, stating clearly their grounds for appeal.

6.2 If required, the Bursary Fund Manager will arrange a meeting of the Appeal Panel. The claim will be reassessed and the student informed of the decision in writing within 10 days of the Panel meeting.

6.3 This procedure is illustrated in the Appeals Process Flow Chart (**Appendix 3**).

7. Timing and Amount of Payments

7.1 Students are only eligible for payments if they are legitimately enrolled and attending as defined by the criteria.

7.2 Applications for 2019/20 Bursary Funds may be made in the time periods below:

- **Window 1**
For a response by Friday, 28th September, applications should be received by Friday, 13th September 2019.
- **Window 2***
Applications received after the Window 1 deadline but before 28 September will receive a response by October half term.
- **In Year Applications***
Beyond Window 2, applications will receive a response within 10 working days of submission. The final deadline for applications is the final day of Spring Half Term.

* All applications outside of Window 1 will also be pro rata based on the student enrolment date and academic year.

7.3 It is expected that at least 80% of the funds for the year will be allocated by November.

7.4 Payment Schedule

Where the full annual payment falls below £60, a single payment will be made within two weeks of approval. All annual amounts above this sum will normally be paid in accordance with the following:

Attendance Review Date	Payment Date	Bursary Amount
Term 1: 1 week after Bursary agreed	Review Date plus 2 weeks	50%
Term 2: End of first full week	Review Date plus 2 weeks	25%
Term 3: End of first full week	Review Date plus 2 weeks	25%

Important Notes

- Exceptions can be granted at the Fund Manager's discretion where attendance may be jeopardised if payment is delayed.
- In certain cases, payments may not be made direct to the student or may only be made on production of a valid invoice or receipt.
- Students should ensure they have a bank account in their name through which to receive funds.
- If a partial allocation is made, the payments will be related proportionately.

7.5 In Year Applications and the Contingency Fund

Applications outside of "Window 1" (13th September) will be from the Contingency Fund (15% of total Bursary Fund Centre allocation. In our example, 15% of £6400 or £960 at Window 2). An estimate of the "residual funds" figure will be made by the Bursary Fund Panel and Steps 1, 2 and 3 applied as above. This means that non-Guaranteed Bursary Group student allocations may vary according to the "residual funds" available in Windows 1 and 2 and during the year. ***Applications outside of Window 1 will also be pro rata based on the student enrolment date and academic year.***

8. Commitment Condition - IMPORTANT

Students' attendance will be reviewed termly at pre-set dates. In order for the following term's payment to be authorised, students must have zero unauthorised absences since the last review or since the start of the course (if term 1). Students have a fresh start after each review thus allowing a Spring or Summer term payment to be possible even if they did not qualify for Autumn. This attendance review will take place centrally and students will be informed if they have unauthorised absences and invited by letter to discuss this with a member of the support staff within one week before the payment is suspended.

9. Emergency Payments

- 9.1** This aspect is designed to support students who find themselves in sudden and exceptional circumstances of hardship that either threatens their continued attendance or academic success. Funds can only be granted if circumstances of hardship have recently changed and the need for funds is immediate in order to address a crisis situation.

9.2 All emergency payments will be made at the discretion of the Principal and subject to the availability of funds.

9.3 Procedure for Applying

- **Stage 1** - Pupils seeking assistance under this category must do so in person via an appointment with the Director of Sixth Form (Mrs K Morris) or in her absence, the Deputy Head of Sixth Form (Mr A Fitzpatrick). This will take the form of an informal meeting during which the member of staff will complete an **Emergency Payment Form**. The applicant will be asked to sign this form at the end of the interview so that it can be treated as an application for emergency assistance to be progressed to Stage 2. This stage may also result from a pastoral care interview instigated by a member of staff where during which it becomes apparent that an emergency payment may be appropriate.
- **Stage 2** - The interviewing member of staff will consult with the Fund Manager to confirm the details of available funds prior to meeting with the Principal to present the application for emergency funding. The Principal will then decide and his/her decision will be final.

10 Policy Review

10.1 The school's Bursary policy will be reviewed annually by the Bursary Fund Manager, in accordance with recommendations from the school's audit, the ContinU Heads and Principals Group and EFA requirements.

Criteria and Eligibility for Payment

1.1 All applicants must satisfy the following key Education Funding Agency (EFA) criteria:

- They must have a legal right to be resident in the UK
- There is every reasonable likelihood that they will be able to complete their course.
- The course they are attending must be eligible for EFA funding.
- They are over 16 years of age and under 19 (at 31 August prior to the start of an academic year of study)

Students must also satisfy the criteria set by the school e.g. income thresholds – see below.

1.2 Each school is allocated a fixed sum of money for the 16-19 Bursary Fund. 5% of the total contributes towards centre administrative costs, while a 15% contingency is held back in the first instance for applications received during the course of the year or for **Emergency payments** (i.e. after the “Window 1” application deadline of 13 September).

1.3 The remaining 80% is then prioritised and allocated as follows:

A) Vulnerable Bursary Students (Guaranteed Bursary)

These students will receive £1200 for the year based on enrolling on a Full Time (EFA funded) course and meeting the Student “Commitment Condition” stated below.

Guaranteed Bursary students are:

- Young people in care.
- Young people leaving care.
- Young people personally in receipt of Income Support or Universal Credit.
- Disabled young people in receipt of Employment Support Allowance or Universal Credit and who are also in receipt of Disability Living Allowance or Personal Independence Payments.

B) Discretionary Bursary Students (Shared Residual Allocations)

The residual fund, i.e. the sum remaining after the Guaranteed Bursary deductions above have been made, will be allocated according to which Student Tier they fall into – see below.

A student may normally receive up to a maximum of £780 from this fund within an academic year (equivalent to 39 weeks x £20). Additional emergency payments may be made, subject to need and available funds.

1.4 Funding Allocation

Step 1: Eligible applicants are identified as falling under one of the three Student Tiers of Need below:

- **Student Tier A** – Students who have successfully claimed Free School Meals for the current academic year (or in year 11 if FE college). Evidence: Local Authority letter/school transition data.
- **Student Tier B** – Students whose home Household income is less than £22,000 Evidence: Working Tax Credit annual statement letter from HMRC.
- **Student Tier C** - Students whose home Household income is less than £26,800 Evidence: Working Tax Credit annual statement letter from HMRC.

Each Tier then has a specific weighting multiple for a share of this residual fund as in Step 2 below:

Step 2: Size of maximum proportional payment depends upon the Student Tier and number of successful applicants.

Tier	Weighting	No. of eligible students
A	4	a
B	2	b
C	1	c

The Student Tier C funding amount is the baseline and is arrived at by calculating:

$$\frac{\text{Total residual funding}}{(4a + 2b + 1c)}$$

From this amount Student Tier A and Student Tier B can be calculated.

Student Tier B funding value = £2C

Student Tier A funding value = £4C

Worked example:

Assumptions:

Total 16-19 Bursary fund	-	£10000
	Less	
3 x Guaranteed Bursary pupils @ £1200 each	-	<u>£ 3600</u>
Residual Funding of £6400 x 80% Allocation	=	<u>£ 5120</u>

Total number of Tier A, B, C learners (not covered by Guaranteed Bursary Group) who are eligible for assistance = 30 and are distributed across the Tiers as detailed below:

Tier	Weighting	No of eligible students
A	4	5
B	2	10
C	1	15
	TOTAL	30

To calculate amount for each Student Tier, start from Student Tier C.

C = Residual Funding £5120

$$(4 \times 5) + (2 \times 10) + (1 \times 15) = 55$$

$$C = \frac{£5120}{55}$$

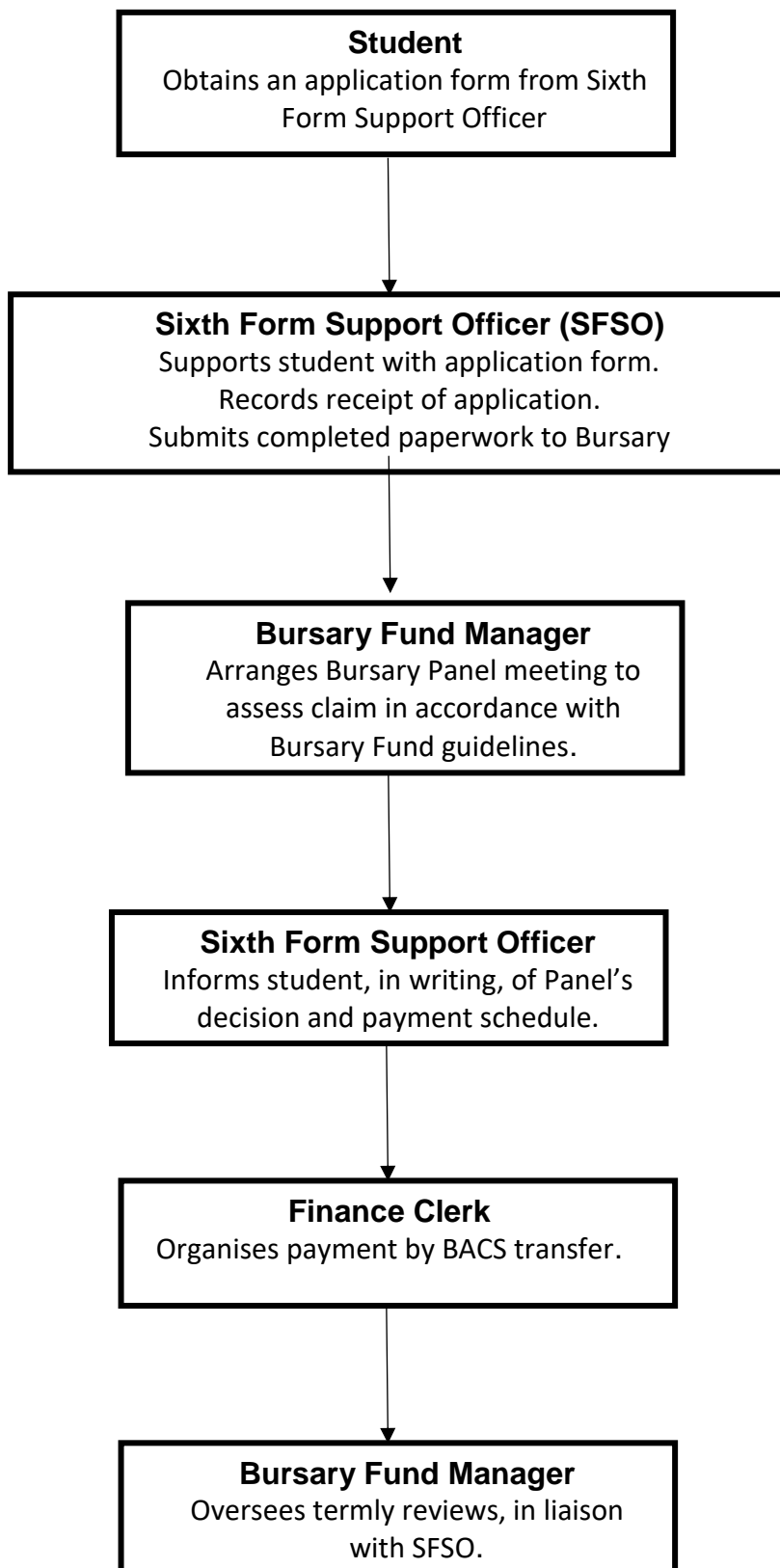
$$\therefore C = £93.09$$

C is now the baseline to set amounts for each Student Tier

Tier	Weighting	Maximum Amount per learner	No of learners	Total Allocation
A	4	4C = £372.36	5	£1,861.80
B	2	2C = £186.18	10	£1,861.80
C	1	1C = £93.09	15	£1,395.35
TOTAL			30	£5,118.95

Step 3: The school's key priority is to facilitate attendance and pupils receiving funds should ensure that this remains their priority at all times. To ensure that this priority is met the school reserves the right to make payments direct to a third party for transport arrangements.

Bursary Fund Application Process



Appeals Process

