



Wyvern Academy

A company limited by guarantee, registered in England and Wales. No 8123602

Bursary Policy

Review of Policy: Autumn 2023

Members of staff responsible: Head Teacher/Data Manager

Policy History: Ratified

Description of Policy Formation and Consultation Process

People involved: Finance & Business Manager/ Head Teacher/ZCC
F& R Committee
FTB

Signed by Chair of Trustees: _____

Date: 28.09.23

Date for next Review: Autumn 2024

16-19 Bursary Fund Academy Policy

The 16-19 Bursary Fund is provided by Central Government to facilitate financial support for young persons to overcome specific barriers to participation so they can remain in education.

This policy sets out the arrangements for how Wyvern Academy will prioritise the 16-19 Bursary Fund each academic year.

The academy is committed to ensuring the fund is used to support financially disadvantaged young people taking up or continuing in their education or training Post 16.

The named contact at the academy for all 16-19 Bursary support/enquiries is Zena Cameron-Campbell.

Bursaries Available

There are two types of 16-19 Bursary available:

Vulnerable Bursary – which is available to all young people who meet the general eligibility criteria as set out in this policy and who have been identified as being most in need.

Discretionary Bursary – which is available to all young people who meet the general and additional eligibility criteria as set out in this policy.

General Eligibility

To be eligible for the bursary at the start of the academic year, all young people must:

- be aged 16 or over but under 19 at 31st August 2024 or
- be aged 19 or over at 31st August and have an Education, Health and Care Plan (EHCP)
- be aged 19 or over at 31st August and continuing on a study programme they began aged 16-18 ('19+ continuers')
- meet the residency criteria in Education and Skill Funding Agency, (ESFA) funding regulations for post 16 education.

Additional Eligibility for Vulnerable Bursary

Young persons, who are in one or more of the groups below, are eligible to apply for a vulnerable bursary of £1,200:

- In Care
- Care leaver
- In receipt of Income Support (IS), or the new Universal Credit (UC), **in their own right**
- In receipt of Employment and Support Allowance (ESA); or the new Universal Credit (UC) **AND** also in receipt of Disability Living Allowance (DLA) or Personal Independence Payments (PIP), **in their own right**

The Academy is responsible for assessing if young people are eligible to receive vulnerable bursaries and for retaining evidence to support the decision. The Academy will submit a funding claim form to the Student Bursary Support Service (SBSS) to receive funding once they have confirmed eligibility.

In some cases, a young person might be eligible for a vulnerable bursary because they are in one or more of the defined groups above but, their financial needs are met already and/or they have no relevant costs. For example, a young person in local authority care whose educational costs are covered in full by the local authority.

Additional Eligibility for Discretionary Bursary

The Academy is awarded an amount of discretionary bursary money each year by the ESFA, which is for young people who are not eligible for a vulnerable bursary. It is the Academy's responsibility to determine the fairest way of distributing this money. They should always ensure that their bursary policy is designed to ensure funding reaches those young people who are most in need of financial support. Academies must also comply with the requirements of the Equality Act 2010 when setting their criteria and must not discriminate against their students, either directly or indirectly, because of their protected characteristics. Wyvern uses a weighted points system of scoring, as follows:

- Young person in receipt of DLA/PIP: 1 point
- Young person in receipt of FSM: 1 point
- Family in receipt of Tax Credits/Income Support: 1 point
- Household income:
 - below £16k = 3 points
 - £16k to £25k = 2 point
 - £25k - £30k = 1 points

The Academy is permitted to use the discretionary funding received in the academic year, plus any underspend from the previous year, (see Underspends below). The total amount is divided using the total points score for all discretionary students.

Evidence

All applications to access the 16-19 Bursary Fund must be supported by appropriate evidence. Copies of evidence shall be retained by the Academy to provide financial assurance as required. All evidence will be treated as confidential and destroyed within 1 year of the young person leaving the academy.

Acceptable supporting evidence for the **Vulnerable Bursary** will be either:

- Statement from the Local Authority confirming the young person's current looked after status (Academy are able to clarify this information)
- Recent Entitlement or Award Statement setting out the benefits to which the young person is entitled

Acceptable supporting evidence for the **Discretionary Bursary** will be either:

- Recent Entitlement or Award Statement setting out the benefits to which the young person is entitled
- Part 1 of the latest Tax Credit Award Notice for the young person's household. This document from HM Revenue & Customs details entitlement to Tax Credits and the Total Income for the correct (previous) Tax year.
- P60 End of Year Certificate for all adults in the young person's household who contribute to household costs. This certificate is a statement of earnings from an employer. It must be for the correct adult(s) and the correct Tax Year. The income will be shown as total for year.
- Self Assessment Tax Calculation this is the equivalent of the P60 for self-employed people. It must be for the correct adult(s) and for the correct Tax year. The income will be shown as total for year.
- Confirmation from the Local Authority of entitlement to Free Academy Meals (FSM) (Academy are able to clarify this information)

Application

Applications for a Bursary must be made using the correct Application Form and should be submitted to the academy via the Data Manager (Zena Cameron-Campbell) with the appropriate supporting evidence.

Method of Payment

Wyvern Academy is a special needs educational establishment and, as such, our students do not generally hold bank accounts in their own name. The academy will therefore manage the funding and provide support 'in kind'. The financial management of all bursary income and expenditure is the responsibility of the Finance & Business Manager (Christine Bellchambers) in conjunction with Megan Capon (Sage, Class Teacher).

Bursary Expenditure

Once the value of each bursary is established, a personalised, costed learning plan will be set up to support the specific needs of each student. This will be written and managed by the Class Teacher in collaboration with the Head Teacher and will also be shared with parents as soon as practical.

This will include, for example, travel passes, protective clothing/equipment, electronic equipment, residential trips, etc. Academies can specify that students must return books and equipment at the end of their study programme to be used again by other students where appropriate.

To give an example: if we decided that IT equipment (a laptop or tablet) is necessary for the student to complete their study programme, it can be bought with bursary funds. However, the equipment should be returned to the academy once the student has completed the study programme for re-use by another student. If keeping this laptop or tablet in school is the best way of ensuring that this happens, we have the right to set this as a condition. Any IT equipment that is returned must be data cleansed before being re-issued to another student.

It is the policy of Wyvern Academy that all resources purchased using bursary funding will be retained by the academy once the student has left and re-allocated to another identified student in the following year.

Exclusions – what the Bursary cannot be used for

Academies cannot use the bursary funds in any way that would give them a competitive advantage over other institutions, for example:

- Fees for access to facilities in the academy
- Block subsidy of Academy meals
- Block subsidy of transport
- Block provision of equipment, material or books
- To make bonus payments to reward attendance or achievement

Change of Young Person's Financial Circumstances

Any young person in receipt of a Bursary has a duty to inform the Academy should their financial circumstances change, or those of their parent/carer.

Young Person Transferring

Where a young person in receipt of a bursary transfers out of the Academy to another education/training provider in-year, the Academy will liaise with that provider to ensure continuity of bursary payments.

Young Person Withdrawing

Where a young person in receipt of a Bursary withdraws from the Academy, and does not transfer to another education/training provider, Bursary payments made prior to the date of withdrawal will not be recovered but any scheduled payments to be made after the date of withdrawal will not be made.

Underspends

Academies are permitted to carry any unspent funds over to the next academic year. Any unspent funds that are carried forward cannot be added to general institution funds and must continue to be used to support students in Post 16 education.

Academies must fully utilise any unspent funds for discretionary bursary before using their new academic year allocation.

Discretionary bursary funding cannot be carried forward for more than one year. ~~Academies are required to contact the ESFA to arrange to return any unspent funds they hold from any year prior to 2019 to 2020.~~

Recycling Vulnerable Bursary funds

Academies may accrue some unused vulnerable bursary funds during the academic year, for example:

- if a student leaves early after only receiving part of their vulnerable bursary
- if the full amount is not paid to a student because they did not meet the agreed conditions, academies are expected to recycle this funding and use it to offset funding claims to the SBSS for other vulnerable students until 30 April 2022. For example, rather than claiming £1,200 for a newly identified vulnerable student, the institution may already be holding £600 which they claimed for a student who has now left and is not now being used for that student. The institution should recycle the £600 for a new vulnerable group student, claiming only £600 from the SBSS to give them the total amount of funding they need

Where an institution holds enough funds to cover the costs of a new vulnerable bursary in full they should still submit a funding claim form to the SBSS (showing a zero amount) to ensure ESFA has accurate information about the numbers of vulnerable students.

Institutions can add any vulnerable bursary funding they have claimed, but no longer need, for vulnerable students to their discretionary bursary allocation in the later part of the academic year.

Institutions that have incorrectly claimed vulnerable bursary funds for a student (because they did not meet the criteria, for example) should try to recycle this funding against other vulnerable students on subsequent funding claims. However, if the institution has no other vulnerable students, the incorrectly claimed funds must not be added to their discretionary bursary allocation (because they were claimed in error). Instead, institutions should contact ESFA to arrange to return the funds: enquiries.efa@education.gov.uk

Fraud

The Department for Education takes all concerns relating to financial irregularity or impropriety seriously and will instigate an investigation where it considers that concerns have been raised in good faith and there is sufficient evidence to warrant it.

Academies are responsible for investigating instances of fraud relating to bursary fund applications.

Audit

16 to 19 bursary funds are subject to assurance as part of normal assurance arrangements.

Management Information

The ESFA has stopped the annual voluntary management information collection for the 16 to 19 bursary fund. Academies should now complete the Individualised Learner Record (ILR) or Academy census as appropriate.

Administration Fees

Academies are permitted to use up to 5% of their allocation for administrative costs.