

The Mercian Trust

16-19 Bursary Fund Policy 2021-22

V2

Policy Owner	The Mercian Trust
Date Ratified by Trust Board	July 2021
Date to be Reviewed:	July 2022
Date Adopted	July 2021

Updates to Policy - 21st October 2021

- Funding for Free School Meals – FSM students eligible for Bursary will have the costs of their FSM allocated to the bursary funding received by the Trust.
- Removal of Tier C eligibility – previous Tier C now combined with Tier B.
- Maximum Bursary award for all students regardless of FSM £800.
- Increase to contribution for laptops.
- Claims email changed.
- Claim form changed to online form instruction for making claims changed.

1. Background

A key priority for the Government is to close the gap in attainment between those from less fortunate and more affluent backgrounds, and to ensure every young person participates in and benefits from a place in 16 to 19 education or training.

The Department for Education (DfE) established the 16-19 Bursary Fund in 2011. The aim of the Fund is to help 16 to 19 year olds continue in education, where they might struggle for financial reasons. It enables those students to access additional funds to support: learning; participation in activities to enrich their learning experience; and pursue applications to Higher Education. There are two types of 16-19 Bursaries:

- **Vulnerable Bursary** For young people in one of the defined vulnerable groups.
- **Discretionary Bursary** Awarded by the Trust to meet individual needs i.e. help with the cost of transport, meals, books and equipment.

2. Eligibility Criteria

For students to be eligible for the bursary fund, students must meet the age and residency criteria as listed below:

- Be aged over 16 and under 19 on 31st August 2021 or 19+ with an Education, Health and Care Plan (EHCP) or continuing on a course you started aged 16 to 18 (known as being a '19+ continuer')
- Be enrolled on a full time course
- Meet the ESFA's residency criteria as set out in the ESFA Funding Guidance
** Students aged 19 or over are not eligible for a Vulnerable Bursary.

3. Bursary Groups

This policy meets the requirements of the Education and Skills Funding Agency (ESFA)'s 16-19 Bursary Fund Guide 2020-21, providing pupils with the opportunity to benefit from the fund at different levels according to individual circumstances. There are three groups at whom the Trust Policy is directed:

➤ **Bursary Level 1 – Vulnerable Student Bursaries**

The Trust can approve up to £1,200 of bursary funding which will be paid to students who are in one of the following 'vulnerable group' as defined by the ESFA:

- In Care or Care Leaver
- Receiving Income Support or Universal Credit in their own right
- Receiving Disability Living Allowance or Personal Independence Payment in their own right and Employment Support Allowance or Universal Credit in their own right

➤ **Bursary Level 2 – Discretionary Bursaries (household income below £25,000)**

This is based on the financial position of the student's family, and their needs to continue in education. To be eligible, the student's family household income must be **below £25,000** per annum, to include income from employment, pensions payments, jobseekers allowance, all tax credits including child tax credit and working tax credit but child benefit may be excluded.

➤ **Bursary Level 3 – Discretionary Bursaries (for pupils not in the above category)**

** Applications / Requests accepted from **January 2022 only****

The 16-19 Bursary Fund is limited. If funds remain after the above bursaries, students not in receipt of these may apply towards the costs of transport, equipment, school trips in the UK, visits to universities etc. Decisions will be made on a case by case basis, and must demonstrate a real need for assistance. Students applying will be required to provide evidence of family income. Evidence of payment of costs will be required (please ensure you keep receipts where possible).

4. How to Apply

Students are required to complete the online 16-19 Bursary Funding application form in the presence of their parent/guardian via the following link <https://tinyurl.com/y8k4phk2>.

Details required:

- Student details
- For vulnerable bursary applications – confirmation of status
- For discretionary bursary applications – confirmation of income
- Student Educational Needs
- Student bank details – in their own name
- Declarations

Important

- Students and their parent/guardian must take great care to ensure information provided to the Trust is true and complete. If information is found to be false or incomplete (i.e. undeclared income) we will request that the money awarded be repaid in full. Failure to repay the award may lead to police involvement / court action.
- The bank account details provided must be in the **student's own name**.

Following the completion of the bursary application, the relevant evidence must be emailed to bursary@the.merciantrust.org in order for the application to be assessed and processed. Please include the school and student's name in the title.

List of possible evidence:

- Letter from H M Revenue & Customs - Tax Credit Award for 2020/21
- Current Benefit Letter from the Department for Work and Pensions (DWP)
- Proof of earnings from Employer - P60 for 20120/21
- Self-Assessment Tax Return (if self-employed) for 2020/21
- Universal Credit Monthly Award Notices for June, July and August 2021
- Confirmation letter from Local Authority of current or recent looked after status (vulnerable group)
- Other confirmation of income

Important

- All applications and evidence must be submitted by **Thursday 30th September 2021**. Late applications will always be considered, but payments cannot always be backdated. Successful applicants will be contacted by The Mercian Trust directly to discuss their award payments.

5. Assessment Procedure

The distribution of the Discretionary Bursary fund will be dependent on the number of eligible students and the Trust reserve the right to retain 20% of the 16-19 Bursary amount provided. This is to accommodate changes in circumstance and ensure that requests for funding from students following such changes can be accommodated. 5% may also be retained for administration of the fund.

The awards listed below are the maximum payments which can be made subject to the numbers of students who are accepted and **are not guaranteed**. They will be determined according to family income and costs expected by the student.

Schools receive no government funding for Free School Meals students in years 12 and 13. We therefore allocate these costs to our bursary funding. This year £500 has been allocated from the Bursary fund to each Free School Meals student to cover the costs of their Free School Meals. The

remaining bursary funds are then available to support students with specific needs to ensure they are not disadvantaged by remaining in education.

The amounts awarded to each student eligible for a level 2 bursary will also be determined by the total number of students who apply successfully before the deadline. The Bursary fund is a finite amount and, in cases where there are high numbers of eligible students, each student may receive less than the maximum. The Trust will seek to ensure total payments do not exceed funding provided by the ESFA.

Tier	Eligibility Criteria for Level 2 Bursaries	Maximum Bursary award for whole year
A	Students in receipt of Free School Meals	£800
B	Students with family income below £25,000, not on free school meals	£800

Important

- For Tier B - evidence of household income for all parent(s) is required to support the application.
- Students who are in receipt of Free School meals (Tier A) will not be required to provide evidence of income – subject to confirmation from the Walsall Council. You can find out if you are entitled to free school meals by visiting the Walsall Council website: https://go.walsall.gov.uk/free_school_meals.

Student Educational Needs

As part of the online bursary application, students are required to indicate how much they may need to spend on items to help them stay in education.

The list below is an example of the costs that students may receive bursary support for:

- Public transport to and from school – If a student indicates in their application form that they take public transport to school, some of their bursary will be allocated specifically to termly payments for travel costs. It will not be possible to claim for travel costs using a claim form, except those relating to university visits.
- School uniform / sports kit – Each eligible student will automatically receive a one off payment of up to £150 to cover their uniform costs for the year. It will not be possible to claim for additional uniform costs using a claim form.
- Trips and UK education visits - we may fund up to **£100 for overseas trips**
- University visits / interviews
- Curriculum materials / equipment – books, revision guides, consumables, etc.
- Examination fees including re-sit if applicable
- Music tuition fees – for tuition organised by the school.
- School meals – Tiers B students will have the option to request that some of their bursary be allocated to the school canteen system.

- Other equipment – we may be able to contribute up to **£300 for a laptop used solely by the student and £100 for a printer.** Please note that students are entitled to 1 printer and 1 laptop during their two years of 6th form/college.
- We would recommend that laptops purchased be of Windows 10 specification so that they are compatible with the forthcoming digital transformation project that the Trust will be embarking upon.
- Other items

6. Payments

Vulnerable Bursary Payments: A fixed guaranteed bursary of £1,200

The frequency and amounts of payments will be agreed between the student, school and Trust Business Manager and will usually be made at regular intervals directly to the student's own bank account via BACS.

Discretionary Bursary: Payments

In order for students to be reimbursed for incurred costs, they must complete the following steps:

- Students are required to complete the online 16-19 Bursary Claim Form which can be found here: <https://forms.office.com/r/fpzNhl7hq2>
- Once the online form is completed, supporting receipts must be emailed to StudentClaims@the.merciantrust.org in order for the claims to be processed. Please include your full name, school and form group in the email so that your receipts and form(s) can be matched.
- In certain instances the school will make payments on behalf of the students. Please also note that some items may not be fully funded.
- Payments are issued to students five times per year; claim forms and receipts must be submitted by the dates below for payments to be processed.

	Claims Form and Receipts Due Dates
1	Friday 15 th October 2021
2	Friday 10 th December 2021
3	Friday 4 th February 2022
4	Friday 25 th March 2022
5	Friday 20 th May 2022

Important

- It is imperative that all claims and receipts are emailed to StudentClaims@the.merciantrust.org within the deadlines above in order for payments to be made. Any claims made **after** the claim dates will be rolled over to the next claim period.
- Claims may only be made with receipts.
- Full payment of the bursary to the student is dependent on the delivery of the **Conditions** listed in the next section.

7. Conditions

Students must meet the following criteria in order to receive their bursaries:

- Have a target attendance of **95%**. Students with below 95% attendance are at risk of their bursary payments being withheld. Students with below 90% attendance will receive no bursary payments. *(Some allowance may be made for students for whom this is not possible, for example those with chronic or ongoing illness or other special circumstances that the school has previously been made aware of.)*
- Be punctual to all lessons.
- Demonstrate good behaviour.
- All work required by teaching staff will be submitted to the deadline set.

8. Complaints or Appeals

Any student or parent who is unhappy with the handling of application for bursary funding or wish to make an appeal should follow The Mercian Trust's complaints procedure. It is important to note that appeals for Levels 1 & 2 bursaries on the grounds of income levels alone are unlikely to result in a revised decision. Complaint forms are available from each school.

9. Confidentiality

The School will ensure that applications are handled confidentially. For audit purposes, however, computerised copies of all documentation for learner support will be kept for a period of six years and will be held securely and in compliance with the Data Protection Act. The information will be made available for audit purposes.

10. Equal Opportunities

No applicant will receive less favourable treatment on the grounds of age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex or sexual orientation.

11. Review

This policy will be reviewed on an annual basis, taking into account the views of The Mercian Trust, young people and their parents and statutory guidance from the Department for Education (DfE) and the Education Funding Agency (ESFA).