



Wetherby High School

16-19 Bursary and Discretionary Fund Policy

Date adopted: June 2016

Date to be reviewed: June 2016/June 2017

Purpose of the policy:

1. To ensure that the funds received annually from the EFA (Education Funding Agency) are targeted toward students that have the greatest need;
2. To ensure any remaining funds are distributed fairly to students whose household income may limit their educational chances;
3. To ensure financial sustainability through the flexible development of EFA funds received, thereby preventing an overspend in any annual cycle of funding;
4. To ensure that any personal financial details remain secure and confidential
5. To minimize the risk of fraudulent claims

Government Bursary Fund:

- A finite figure was devised by the EFA using an estimation figure of the number of students in 2009/10 who were eligible for the maximum EMA payment x £190.
- As such, Level One student's (defined below) were to receive an annual bursary of £1200 and the remainder was to be shared amongst other eligible Level Two students (defined below).
- In addition to this, a 5% administrative cost was to be applied and a discretionary hardship fund created. To provide for these latter costs, 15% was withheld from the grant and the annual bursary for Level Two students was calculated according to the formula:
- Annual EFA grant minus 15% then minus (£1200 x no. of eligible Level One students) = remainder divided by number of eligible Level Two students (up to a maximum of £800). Eligible late applicants (due to changes in household circumstances) will be provided for through the 10% retained to support the discretionary hardship fund.
- The same formula is being used for 2016/2017 period.

16-19 Bursary Applications (from September 2016)

Eligibility:

To receive a bursary, the student must be aged under 19 on 31st August in the academic year in which they start their programme of study and must satisfy DFE residency criteria.

The student must satisfy the following school conditions:

- 1) The student's level of attendance must be a minimum of 95%
- 2) The student must not have broken the terms of the Sixth Form Contract (Learning Agreement)
- 3) The student must comply with the following bursary contract document extract:
 - (a) The school will check all claims for travel against the student's attendance record and he/she will not be refunded for any days he/she did not attend school for reasons other than illness. A parent/carer will contact the school on the first day of the student's absence and he/she will provide a note to explain the absence when he/she comes back in to school.
 - (b) Claims will be withheld if home learning or assignments are not up to date, until the work is completed.
 - (c) If necessary, students may only purchase one printer at the beginning of their course and it will be expected to last for the remainder of their studies in Sixth Form.
 - (d) Claims for stationery will be limited to £60 per academic year.
 - (e) All claims must be submitted within 14 days of purchase.

Evidence requirement

Evidence of household income by way of a P60, Working Tax Credit annual statement from HMRC, Receipt of Benefit Notification, Tax Credit Award Notification or Self Employed Income Notification must be provided to the school Finance office along with the completed application form.

Level One: Guaranteed Bursary

These students will receive £1200 per year.

A *Level One* student is:

- A student in care
- A care leaver
- Student in receipt of income support
- Disabled student in receipt of employment and support allowance who is also in receipt of disability living allowance.

Level Two: Discretionary Fund/Hardship Fund

As an alternative to weekly payments, Wetherby High School will operate a discretionary payment system for specific educational purposes such as: books & equipment; transport, university application (UCAS fees); costs of travel to HE interviews; educational visits (including residential).

To be able to apply for this funding, students will have to prove that they meet some or all of the following criteria in the form of appropriate supporting documentation:

- That they or their parent(s) are in receipt of income support or other means tested benefits
- That they fulfil UK residency conditions
- That the total family income is less than £20,817 for the last financial tax year
- That they were eligible for free school meals last year

Students can either receive goods directly from school or be refunded for purchases made retrospectively (evidenced by a receipt). Eligibility will be determined via formal application. Each claim will be assessed separately.

Application Process and Payments

All bursary fund applications are to be made to the Head of Sixth Form, along with the required evidence. In year applications would be subject to funds being available.

Wetherby High School will then process the information and advise students, in writing, of the outcome. All eligible bursary payments will be attendance and achievement related and back dated to the start of the courses the student has enrolled upon.

Payments can be made in cash (up to £25.00) or cheque made payable to the student. Payments will be subject to the conditions laid down in the 16-19 Bursary Contract, including attendance, behaviour, completion of coursework and completion of courses enrolled upon. Once entitlement is approved, a separate 16-19 Bursary contract will be signed by the claimant and a copy kept by the Head of Sixth Form.

Security and Personal Information

All applications will be made through Sixth Form. All personal information, including bank details and household earnings, will be stored securely and will remain strictly confidential.

Internal Appeals Process

Students have a right to appeal against a decision if they have evidence that the school has made a mistake and that they have behaved in accordance with the terms of the 16-19 Bursary Fund contract. Appeals should be made to the Head teacher in the first instance. If a further appeal is to be requested then this will be heard by a Governors' subcommittee of two members including a school governor and a neutral member of staff.

Fraud

Parent/Carer and student must confirm that all information provided is true and must notify Wetherby High School if any circumstances change. The bursary will be provided on the basis that certain conditions set by the school, as detailed in the bursary contract, will be adhered to. Parents and students will be required to jointly sign applications so that they understand that money may be claimed back and eligibility withdrawn should they knowingly provide information which is discovered to be false.