

INVICTUS

Education Trust

2024/25 Academic Year

16 – 19 BURSARY FUND

POLICY



Document Control and Version Control

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5	Karen Cocker	May 2023	2023/24 Bursary Policy
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2024/25 Academic Year 16 – 19 BURSARY FUND POLICY

What is the 16 to 19 Bursary Fund?

The 16 to 19 Bursary Fund is made available from the Government through the Education Skills Funding Agency (ESFA) and provides financial support to help students overcome specific financial barriers to participation so they can remain in education.

The Trust's policy has been developed in line with the ESFA guidance to ensure that all students are treated in a fair and consistent way.

Who is Eligible?

There are two types of 16 to 19 bursaries and a student must be aged 16 or over but under 19 at 31 August 2024 to be eligible for help from the bursary fund in the 2024 to 2025 academic year:

- bursaries for defined **vulnerable** groups of up to £1,200 a year;
- **discretionary** bursaries which the Trust awards to meet individual needs, for example, help with the cost of transport, meals, books and equipment.

Grant Funding Available

- The **Vulnerable** bursary grant, up to £1,200, is claimed by the Trust Post 16 Administrator from the ESFA on an individual claim/student basis. There is a deadline of 31 July 2025. Access is via the Student Bursary Support Service (SBSS) online portal.
- The **Discretionary** bursary grant is allocated to the Trust by the annual 16-19 formulaic bursary grant awarded from the ESFA. This is a finite allocation for the Trust to distribute in line with the policy. The Trust will set aside 20% of the 16-19 Discretionary Bursary amount provided to accommodate changes in circumstance and ensure that requests for funding from students received after 31 December can be accommodated.

Eligibility Criteria: Group 1

Bursaries for young people in defined **Vulnerable** groups

The defined vulnerable groups are students who are:

- in care;
- care leavers;
- receiving Income Support (IS), or Universal Credit (UC) because they are financially supporting themselves or financially supporting themselves and someone who is dependent on them and living with them such as a child or partner;
- receiving Disability Living Allowance (DLA) or Personal Independence Payments (PIP) in their own right as well as Employment and Support Allowance (ESA) or UC in their own right.

The bursary for vulnerable groups can pay up to £1,200 per year to a student participating on a study programme that lasts for 30 weeks or more. Students on study programmes of less than 30 weeks will be paid a pro-rata amount.

Definitions of students in Vulnerable Groups can be found in the ESFA guidance

<https://www.gov.uk/government/publications/16-to-19-bursary-fund-guide-2024-to-2025-academic-year/16-to-19-bursary-fund-guide-2024-to-2025-academic-year#:~:text=1.-,Summary,bursaries%20for%20defined%20vulnerable%20groups.>

Pro-rata Bursaries for Vulnerable Groups

The Trust may decide that although a young person may be eligible for a bursary because they are in one or more of the defined vulnerable groups, they do not have any actual financial need. This might be because their financial needs are already met and/or because they have no relevant costs. The Trust can refuse a student's application on this basis. Similarly, students should only receive the amount they actually need to participate and not automatically receive £1,200 if they do not need the full amount. Equally, the Trust can pay a bursary to a vulnerable group student of more than £1,200 if they assess they need extra help to remain in education. Any payments over £1,200 must be paid from the Trust's discretionary bursary allocation or from their own School budget funds.

Evidence of Eligibility

Institutions must obtain proof that students are eligible for a bursary for **vulnerable** groups in full and will retain copies for audit purposes. For example:

- for students who are in care or a care leaver, written confirmation of their current or previous looked-after status from the relevant local authority - this is the local authority that looks after them or provides their leaving care services. The evidence could be a letter or an email but must be clearly from the local authority
- for students in receipt of IS or UC, a copy of their IS or UC award notice. This must clearly state that the claim is in the student's name/confirm they are entitled to the benefits in their own right. The evidence must not state any conditions that prevent them from participating in further education or training. For students in receipt of UC, institutions must also see a document such as a tenancy agreement in the student's name, a child benefit receipt, children's birth certificates, utility bills and so on.
- for students receiving UC/ESA and Disability Living Allowance (DLA) and Personal Independence Payments(PIP), a copy of their UC claim from DWP. Evidence of receipt of DLA or PIP must also be provided.

UC claimants should be able to print off details of their award from their online account or provide a screenshot to the institution.

Eligibility Criteria: Group 2

Discretionary Bursaries

If your total household income is below £36,750 you will be able to apply for a bursary award.

Evidence of household income will be required and may include:

- P60 or 2 months' pay slips or 4 weekly slips dated within 3 months (take home pay figure is used);
- 2024 audited accounts or 2024 official tax return or Tax credits award 2024-25 showing self employed income;
- Pension – official letter showing an ongoing pension dated 2024 onwards;
- Universal credit and Earnings above £7,400 per year – all pages of the latest 3 award statements for 2024 onwards showing earnings for each period;
- Council Tax Reduction or Rent Rebate – all pages of an official letter showing ongoing benefit for 2024 onwards;
- Child Tax Credit and Income above £16,190 per year-all pages of the 2024-25 tax credits award or bank statements showing 3 consecutive payments dated within 3 months;
- Child Benefit – all pages of an official letter showing an ongoing benefit for 2024 onwards or bank statements showing 3 consecutive payments dated within 3 months;
- Other Income or Benefits – please specify.
- Exclusions – income earning from siblings of the post 16 student living within the household will be excluded for the calculation of household income

A bank statement is required to evidence the income paid in respect of the above.

The Trust can now exercise discretion as to whether the checks on household income are made annually or just once at the beginning of a student's study programme. If, in the interests of efficiency and speed in considering the application, the Trust decide not to conduct annual checks of household income eligibility, the Trust must ensure a signed and dated (hard copy or electronic) self-declaration form is obtained from the student to confirm that their household circumstances have not changed.

The application will be considered by the Trust's Bursary Committee during the first term of the academic year therefore claims must be submitted by **31 October for consideration**. Any ad hoc claims after this date will be considered on the basis of the 20% funds remaining and on a first come first served basis. Students and their parents/carers should understand that the available fund is limited.

The Bursary Committee is made up of the Director of Sixth Form, Finance Officer and Sixth Form Administration. The Director of Sixth Form will offer information to the Committee about a student's circumstances, well-being, behaviour, progress and attendance, if required.

What can the Bursary Fund be Used for?

- Books/materials/equipment
- Free/subsidised school meals normally taken in school
- Trips and enrichment
- UCAS fees and University open day visits
- Professional clothing for attendance at Sixth form or interviews
- Other items relevant to the individual student, this can include sportswear if appropriate to students post 16 course
- Travel – help with transport costs.

What the Bursary Fund Cannot be Used for

The bursary fund is not intended to provide learning support - for example, counselling or mentoring, or to support extra-curricular activities where these are not essential to the students' study programme.

Conditions for Receiving Bursary Funding

The bursary for vulnerable groups and, the discretionary bursary is conditional on the student having satisfactory attendance, performance and behaviour.

How to Make a Claim?

To make a claim, complete the application form of this Policy at:

- Appendix 1 and 3 for Group 1 Vulnerable bursary; or
- Appendix 2 and 3 for Group 2 Discretionary bursary.

Notification of Qualification for the Bursary

Students will receive a letter or email confirming receipt of their application to the '16-19 Bursary Fund' along with the support allocation awarded by the Bursary Fund Committee and, if appropriate, a payment scheme.

Paying Bursary Funding to Eligible Students

ESFA encourages institutions to pay bursaries in-kind rather than cash as far as possible and does not recommend that large or lump sum bursary payments are made to students.

Any bursary payments made to you will be by BACS and outlined in detail when the award is made. Bank details must be in the student's name.

Appeals

Any student wishing to appeal against the Support Level allocated should do so in writing within two weeks of receiving their letter of Support Allocation. Appeals should be made to the Trust's Sixth Form Administrator. It is expected that further evidence to support the funding request will be provided by the student if called upon.

Administration Contribution

The Trust is permitted to use up to 5% of their allocation for administrative costs.

Discretionary Bursary Funding Remaining

If there are funds remaining at 31 July, then these will be used to replenish the post 16 tuition books which are provided to the students for their use whilst studying at the Invictus Education Trust post 16 school.

Recovering Funds Due to Fraud

This Trust is responsible for investigating instances of fraud relating to bursary fund applications. Significant fraud involves one or more of the following:

- the amount of money is over £1,200;
- the particulars of the fraud are novel, unusual, systemic or complex;
- there is likely to be great public interest because of the nature of the fraud or the people involved.

Rules on Unspent Bursary Funds

The ESFA permits institutions to carry unspent bursary funds over to the next academic year and must continue to be used to support students in this category. The Trust must fully utilise any unspent funds for either discretionary bursary or free meals before using the new academic year allocation. Any remaining funds must be returned to the ESFA.

Audit, Assurance and Fraud

16 to 19 Bursary Funds are subject to normal assurance arrangements for 16 to 19 education and training.

The Trust will retain copies of any documents the student has signed to give formal agreement to their conditions for payment.

Hard or scanned copies of documentation will be retained for 6 years. This includes the application form and the household income evidence.

Examples of documentation include:

For the bursary for vulnerable groups:

- copy of the funding claim sent to SBSS.
- evidence showing that the student is eligible, for example, a letter from DWP or the local authority or a copy of the student's online UC statement.
- evidence of payments received from the SBSS, for example bank statements and remittance advices.
- a copy of the student's individual assessment of actual financial need.
- evidence of payments or support provided in-kind to the student.

For the discretionary bursary:

- evidence used to assess eligibility and determine household income, such as P60's, self-employment accounts, wage slips, a letter from DWP, copies of online statements for UC.
- a copy of the student's individual assessment of actual financial need, including the calculation that has determined the amount awarded.
- receipts for purchases made by students, for example, bus pass, lunch receipts or book receipts, or support provided by the institution in-kind to the student.

Invictus Education Trust
16 to 19 Bursary Fund Application 2024-25
Group 1: Vulnerable Bursary Application

Please read the Trust's Bursary guidance carefully before completing and submitting your application.

Group 1 (Section A) to be completed by the Student

Vulnerable Group Bursary - for looked after students, those in care, care leavers, students receiving Income Support (or Universal Credit) in their own name and disabled students in receipt of both Employment Support Allowance and Disability Living Allowance (or Personal Independence payments).

Section A			
Students full name:		Tutor Group	
Invictus School registered at:			
Students full address: Including Post Code			
Contact telephone number:			
Email address			

I wish to claim support from the 16 to 19 **vulnerable bursary fund**, and I provide the following information as evidence of my personal circumstance (please tick as appropriate and attach documentary evidence)

	<i>Tick as appropriate</i>
Written Local Authority evidence of looked-after or care status.	
HMRC evidence e.g. Tax credits award, Pension credits and Universal credits.	
Employment Support Allowance, Job Seekers & Income Support in my own name combined with Disability Living Allowance or Personal Independence Payments.	
Housing Benefit.	
Information provided is for this purpose only and will be treated in the strictest confidence.	

<p>I confirm that I have read the Trust's attached guidance, and the information provided on this form is correct.</p> <p>I understand that any false information given, or failure to notify the Sixth Form administrator of a change in personal circumstances, will result in disqualification of support.</p>	
Student signature:	Date:
Parent/Guardian signature:	Date:

Group 1 (Section B) to be completed by Sixth Form Bursary Fund Administrator

Section B	
I have seen the evidence required for the full bursary and have placed copies on the students files	
Award Approved/amount £	Date
Actions agreed to re-imburse the Student	
Administrator Name & signature:	Date:
Finance authorisation:	Date
Bursary Committee members in attendance/Director of 6 th form Approval:	Date of meeting/approval

Invictus Education Trust
16 to 19 Bursary Fund Application 2024-25
Group 2: Discretionary Bursary Application

Please read the Trust's Bursary guidance carefully before completing and submitting your application.

Group 2 (Section C) to be completed by the Student

Discretionary bursary for students from lower income households up to **£36,750**.

Section C		
Students full name:		Tutor Group
Invictus School registered at:		
List the Invictus Schools attended for lessons (this is needed for free school meals allowance)		
Students full address:		
Contact telephone number:		
Email address		
I wish to claim support from the 16 to 19 discretionary bursary fund , and I provide the following information as evidence of my personal circumstance (please tick as appropriate and attach documentary evidence)		
	<i>Tick as appropriate</i>	
Bank statement to support the income paid in respect of the below, where applicable.		
P60 or 2 months' pay slips or 4 weekly slips dated within 3 months (take home pay figure is used)		
2023 audited accounts or 2023 official tax return or Tax credits award 2024-25 showing self employed income.		
Pension – official letter showing an ongoing pension dated 2024 onwards.		
Universal credit and Earnings above £7,400 per year – all pages of the latest 3 award statements for 2024 onwards showing earnings for each period.		
Council Tax Reduction or Rent Rebate– all pages of an official letter showing ongoing benefit for 2024 onwards.		
Child Tax Credit and Income above £16,190 per year-all pages of the 2024-25 tax credits award or bank statements showing 3 consecutive payments dated within 3 months.		
Child Benefit – all pages of an official letter showing an ongoing benefit for 2024 onwards or bank statements showing 3 consecutive payments dated within 3 months.		
Other Income or Benefits – please specify		

Information provided is for this purpose only and will be treated in the strictest confidence	
Please detail what financial support you need and the costs applicable to the best of your knowledge when submitting the claim	Cost
Total costs applicable	£

NB: For audit purposes all receipts/invoices, etc must be filed with this claim to verify payment.

<p>I confirm that I have read the attached guidance, and the information provided on this form is correct. I understand that any false information given, or failure to notify the Sixth Form administrator of a change in personal circumstances, will result in disqualification of support. I understand that I may have to repay part or all of this assistance offered if my attendance, conduct or progress is not satisfactory.</p>	
Student signature:	Date:
Parent/Guardian signature:	Date:

Group 2 (Section D) to be completed by Bursary Fund Administrator

Section D	
I have seen the evidence required for the full bursary and have placed copies on the students' files	
Award Approved/amount £	Date
Actions agreed to re-imburse the Student	
Administrator name & signature:	Date:
Finance authorisation:	Date
Bursary Committee members in attendance/Director of 6 th form Approval:	Date of meeting/approval

**Invictus Education Trust
16 to 19 Bursary Fund Application 2024-25
Group 1 & 2 Applications – Bank Account Details**

Groups 1 & 2 (Section E) to be completed by the Student

Section E: Student Bank/Building Society Details

To receive payments, you must have a bank account in your own name. If you do not have a bank account, you need to open one before completing this form.

Name of Account

Holder:.....

Name of Bank:

.....

Branch

Address:.....

Account Number: Sort Code:

.....

Please note that if your application for the 16 to 19 Bursary Fund is unsuccessful these details will be shredded. For those that are successful, these details will be kept securely and confidentially.



Notification of a Bursary Award Determination for the Academic Year 2024-25

Students Name: _____

Students School of Registration: _____

Date of Application: _____

Date Approved or Declined (please specify): _____

Bursary Request Category – please highlight

- Vulnerable

- Discretionary

Information Regarding Support <u>Approved</u> for 2024-25 Academic Year	Cost
Total costs applicable	£

Information Regarding Support <u>Declined</u> for 2024-25 Academic Year	Reason

For further information please contact the Post 16 Administrator [Kelly Chapman](mailto:kchapman@invictus.education)
kchapman@invictus.education

