JKHS 6th Form 16-19 Bursary Policy

Policy Aims: To provide clear information and guidance on the fair allocation of bursary funds based on government advice. Further information can be found in the guidance notes for application, in the bursary section of the school website.

1. What is the 16-19 Bursary

The 16-19 Bursary is available to *support students from lower income families* and those from *specified groups*, with the *financial costs of continuing their education post-16*. It is means-tested, meaning linked to household income and financial need. The money is provided by the government and aims to support students who have difficulty in meeting costs related to their studies.

There are two categories of bursary.

i) **Discretionary bursaries** are based on gross annual household income.
It aims to contribute towards the financial costs linked to the study programme (your A level subjects).
Please note the current household *income limit* for discretionary applications is **£60,000 per annum** with awards being allocated on a sliding scale. Household income up to £38,000 will receive 100% of their claim, between £38,001 and £48,000 will receive 75% and between £48,001 and £60,000 it will be 50%. All allocations will be based on financial need, and an application is not a guarantee that claims will be paid.

ii) **Vulnerable group bursaries (VG)** are for specific students who the government have identified as possibly facing barriers to education. This includes:
Looked after young people and care leavers.
Students in receipt of specific welfare benefits in their own name. (Universal Credit UC, Disability Living Allowance DLA and Personal Independence Payments PIP)
Please note qualifying as a vulnerable group will still require assessment of financial need and is not a guarantee of bursary allocation.

2. Who is eligible

To qualify, a student must be **under 19 years** of age on 31st August in the academic year in which they start the programme of study.

The only exceptions are students aged 19 and who are continuing a study programme they began aged 16 to 18 (19+ continuers) or students aged 19 or over who have an Education, Health, and Care (EHC) Plan. Students aged 19 and over are not eligible for VG bursaries.

Students must meet the **residency** criteria for post-16 provision.

It is presumed that if school accepts a student onto the 6th form programme, they have met the residency criteria and will be eligible to apply for a bursary.

Eligibility for discretionary bursary is gross annual household income at or below £38,000 and eligibility for vulnerable group bursary is indicated above.

3. What evidence is required

*All evidence provided should include the student and/or parent/carer **full name** and **address** where possible. It can be uploaded as word document or images with the application form. Some evidence can be added after completing the application form, for example by email.*

For looked after young people or care leavers school will need written evidence from their Local Authority of their care status.

For students who are personally in receipt of Universal Credit, Disability Living Allowance or Personal Independence Payments, school will need written evidence. For example, the confirmation of benefit award letter and/or 3 months of statements.

For all other students, a financial assessment is necessary. This should be based on recent total annual household taxable income. Evidence of parent/carer income could be

- ✓ Payslips (**3 X monthly** or **4 X weekly**, most recent) or most recent P60
- ✓ Parental/carer Universal Credit documentation (**3** most recent monthly statements /confirmation award letter)
- ✓ Parent/Carer PIP documentation (**3** most recent monthly statements/confirmation award letter)
- ✓ Pension
- ✓ Other means-tested benefit
- ✓ Accounts if self-employed – most recent audited accounts or Tax Return
- ✓ Income from dividends or rental income
- ✓ In exceptional circumstances where it may be difficult to provide evidence, please get in touch with school directly. There may be occasions where a signed statement by a parent/carer can provide enough evidence.

Where students spend time between different households the financial assessment will be based on where they spend the majority of their time. In the case of a 50-50 time spent between households, this can be a chosen household or an average of both.

<u>Awards cannot be made unless the required evidence is provided.</u>
<u>Household expenditure is not relevant to the assessment</u>.

4. How to apply

Students and parents/carers will need to complete a **Microsoft Form** answering questions on their financial situation, individual circumstances and the costs linked to their studies. This will enable an assessment of financial need. Details will be sent out at the start of the year.

Students will need to give their **bank details** because any payments made, other than those paid in kind, must be paid into a bank account in the student's name rather than a parent/carer. Only in exceptional circumstances will money be paid into an account which is not in the student's name.

It is essential that **both** student **and** parent/carer **sign** the Microsoft Form to agree that all information is correct to the best of their knowledge. Giving false information, for example regarding household income, could result in money being reclaimed.

5. <u>Making Claims</u>

Students need to clearly state **what** they require financial assistance with, **how much money** they are applying for, and **reasons** why the claimed item is an **essential** part of their studies.

- Transport/travel. Either via school bus, public service bus, or claiming for fuel.
- Cost of essential trips such as field trips.
- Essential items such as resources needed for courses, books, stationary or other materials/equipment required for their education.
- Support with technology and IT equipment.
- Essential clothing, for example students who walk to school could reasonably request a waterproof coat and shoes.
- Essential work experience costs and support accessing university open days.
- Anything else deemed essential to support the student with their studies.

JKHS understands that individual circumstances can change. With this in mind bursaries will be allocated so that there are funds remaining which can be used for students where financial barriers to participation may arise over the course of the academic year. In these situations, students will be encouraged to discuss their needs with HOY/PSO and applications for funds can be made, with evidence, on a case-by-case basis.

6. <u>How allocation decisions are made</u>

Once evidence has been received of membership of a defined vulnerable group or household income that meets the threshold, the claim will be assessed in terms of the costs linked to study.

A student's individual circumstances will be considered.

Priority awards include **travel, essential trips and essential resources.** The bursary fund is not intended to support extra-curricular or non-essential activities, nor can bursary funds provide living costs support such as food (except in exceptional circumstances).

Bursary funds will, where possible, be paid in kind. For example, where money is allocated for essential trips, the money will be paid directly into ParentPay.

Bursary support may be available for individual cases of **severe hardship** for **meal support** in school. (Severe hardship judgments can be made without undertaking checks on household income or gathering other evidence that would normally be required, but these payments are expected to be short-term and relatively uncommon).

The bursary is open to all students to make an application; however, the allocation for both vulnerable group and discretionary bursaries is based on assessment of **individual circumstances** and **financial need.**

7. Confidentiality and equality

All information and evidence received in support of bursary applications will be treated as confidential, it will be stored in compliance with GDPR and school policy on Data Protection. Applications for bursary awards will be encouraged. They will be treated with anonymity and respect for privacy to avoid any chance that a student may be put off applying.
Bursary policy and allocations will abide by the Equality Act 2010 and will not discriminate in any way against applications from people who fall under the protected characteristics.
Being provided with a bursary payment does not affect household income in terms of welfare benefit calculations and does not need to be declared to the DWP.

8. Conditions attached to bursary awards

Outcomes of bursary applications will be communicated to students within the timescale set out on the application information sent to parent/carers.

Receipts may be required where bursaries are awarded for specific material or equipment. Government rules state that bursary awards are only to be spent on the items being claimed for in the application.

Bursary allocations are conditional on the student meeting agreed standards stated in the JKHS Sixth Form Contract. Students are asked to sign their agreement to their bursary allocation and the conditions. In the unlikely event of a student failing to meet the conditions, payments may be withheld. However, this would be a last resort, and we will always consider the individual circumstances.

9. Complaints and appeals

Any student or parent who is unhappy with how their bursary application has been managed, or the support that has been provided, should follow the JKHS complaints procedure. The policy can be found here: download.asp

10. Other information

The amount of bursary funding allocated to a school is decided by the government (the Education and Skills Funding Agency: ESFA) and is therefore a cash-limited amount. Funds can only be allocated whilst funding lasts. As stipulated by the ESFA, 5% of the allocation is used by the school to cover administrative costs.
We have a duty to obtain and keep evidence in relation to bursary applications. For example, of a student's membership of defined vulnerable groups, and of household income. This is for government and audit purposes.

The **aim of all bursary payments** is to support where there is **need and enable** students to **overcome financial barriers to continuing education after the age of 16.**

Date of review	Date agreed	SLT	Governors	Review date	Comments
09/09/2026	09/09/2026	HT		09/09/2026	New income thresholds