Southfields Academy: Bursary Fund Policy

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Reviewed by: Board of Trustees, Every Child Matters

Signature

Date
Introduction
The Sixth Form Bursary Fund is set up to provide financial support to help students overcome specific barriers to participation so they can stay in education. There are two types of 16-19 bursaries:

- A vulnerable bursary of up to £1,200 a year for students in one of the defined vulnerable groups.
- Discretionary bursaries that institutions award to meet individual needs, for example, transport, meals, books and equipment.

Vulnerable bursary
An application for a vulnerable bursary can be made where the applicant is in one of the groups below:

- in care
- previously been in care
- in receipt of Income Support or Universal Credit in place of Income Support in the student’s name
- in receipt of Employment Support Allowance (or Universal Credit in place of ESA) and Disability Living Allowance or Personal Independence Payments in the student’s name.

Discretionary bursary

- The academy’s policy is to offer the discretionary bursary to those students who are in receipt of Free School Meals (FSM) in KS5. (Student will be encouraged to apply for FSM when they enrol.) FSM is processed through the Local Authority.
- Discretionary awards are not for a guaranteed sum of money but are dependent upon the level of funding allocated to the school each academic year and the individual needs of each student. It is also dependent on the number of applications received.

Exceptional Circumstances
The Bursary Fund can also help with hardship needs arising from a sudden change in the financial circumstances of families during the year, such as a redundancy or sudden drop in income. Students who apply with exceptional circumstances will be viewed on an individual basis where financial need can be evidenced. A covering letter should be included, outlining the circumstances and providing supporting evidence.

Evidence
All applications to access the Sixth Form Bursary Fund must be supported by appropriate evidence. Copies of evidence shall be retained by the school to provide financial assurance as required. All evidence will be treated as confidential.

Acceptable supporting evidence for the Vulnerable Bursary will either be a:
• Statement from the Local Authority confirming the student’s current or previous looked after status
• Recent entitlement or Award Statement setting out the benefit to which the student is entitled.

Acceptable supporting evidence for the Discretionary Bursary is the Free School Meals entitlement.

Discretionary awards are not for a guaranteed sum of money but are dependent upon the level of funding allocated to the school each academic year. It is also dependent on the number of applications received.

Notes:

● No payments will be made before the October SLASC count. Thereafter, payments will be made every half term (excluding the second half of the summer term).
● The school reserves the right to make discretionary additional payments, as required. Other students who need financial support to help them to stay in education may also be able to claim a bursary to help the cost of, for example, transport, meals, books and equipment.
● Payments may be made “in kind”. For example, the academy may use the bursary fund to pay for books, laptops, equipment and trips. Any equipment bought for students remains the property of the academy.
● The finance department will administer the bursary scheme. Payments will usually be made by BACS.
● 95% attendance to school is required. The rate of a student’s attendance will directly affect the level of bursary payment they receive.
● Students will be expected to sign the “Bursary Fund Student Learning Agreement” before receiving their first payment.
● Completion of homework and engagement in learning alongside 95% attendance, good punctuality and good behaviour is a requirement for Bursary payment.

How the Bursary will be Paid
The Bursary will need to be paid into a bank account in the student’s own name and proof of the bank account e.g. a bank statement, will need to be provided. Behaviour, homework, attendance and punctuality will be monitored weekly. Upon meeting the Academy’s expectations, the full payment will be made into the bank account every half term. Deductions will be made where the minimum requirements have not been met regarding behaviour, homework, attendance and punctuality.

These expectations will not be additional to those expected of any student within the Sixth Form.

How to apply
Bursary packs are available for collection from the Sixth Form office. This pack includes bursary information, detailed eligibility criteria and an application form. The student is required to fill out the student section of the application form and the other section will need to be completed by the adult who has main responsibility for the student. All this information should be handed into the Finance Office by the date specified in the pack. Any applications made after the deadline may not be accepted as funds will have already been allocated to other students.
Process
All applications for a bursary will be assessed by the Sixth Form Bursary Application panel.

The Panel will review the application and supporting evidence and students will then be notified of the outcome by letter.

Right to Appeal
If any student or their parent/guardian/carer(s) are not satisfied with the outcome of their application, they should write to the Deputy Head responsible for Post-16 form outlining their reasons. The Deputy Head responsible for Post-16 will convene an Appeals Panel consisting of the CEO and Head of Year plus a member of the Governing Body to consider the case. If the appeal is upheld or partly upheld, it will be referred back to the Application Panel with recommendations. If the appeal is not upheld, the appealing party will be signposted to the school’s Complaints Procedure.

Change of Student’s Financial Circumstances
Any student in receipt of a bursary has a duty to inform the school if their financial circumstances change, or those of their parent/guardian/carer(s) change. This does not automatically mean any future bursary payments will be stopped.

Student Withdrawing
Where a student in receipt of a bursary withdraws from the school and does not transfer to another education or 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.

Student Transferring
Where a student in receipt of a bursary transfers out of the school to another education/training provider in-year, the school will liaise with that provider to ensure continuity of bursary payments to enable the student to complete their learning.
Southfields Academy Sixth Form
Bursary Fund
Student Learning Agreement

Awarding the payment

- At the end of every half term we will decide whether you are entitled to your payment based on your attendance, punctuality, behaviour and engagement in lessons. Five payments will be made during the year (two during the Autumn Term, two during the Spring Term and one during the Summer Term).
- Payments may also be made “in kind” for textbooks, laptops, course equipment, field trips and other costs related to the courses you are studying. This means that these will be paid for directly by the academy rather than you receiving the funds.
- The Academy expects you to have attendance of at least 95%, and that your work is completed to the best of your ability. It is also important that you register with your tutor each morning, as this is how we monitor attendance.
- The rate of each student’s attendance will directly affect the level of bursary payment they receive.

Examples of ‘Authorised Absence’

- A medical appointment which cannot be arranged outside of Academy hours (this does not include routine dental treatment). You will need to provide an appointment card.
- A particular need to look after a family member or another person who you have caring responsibilities for. (NB this would be a one-off incident and not happen regularly).
- A religious holiday.
- A visit to a university either to attend an interview or careers-related event.
- An appointment with a careers advisor (although you should try to arrange these outside of lessons).
- A work experience placement which is part of a course.
- If you are taking part in a significant extra-curricular activity, such as drama, music, sport or volunteering. Authorised Absence will only be given where the activity reflects a significant level of personal achievement (e.g. taking part in a regional or national event), or for some other one-off event.
- A probation meeting.
- Going to a funeral of a close relative or friend (a close relative would be: mother, father, step-parents, siblings or grandparents).
- Severe problems with your transport.

Reasons that are not generally acceptable for ‘Authorised Absence’

- Holidays.
- Part or Full Time work which isn’t part of your programme of study.
- Leisure activities.
- Birthdays or similar celebrations.
• Babysitting your younger brothers and sisters.
• Shopping.
• Being off ill with no medical note supporting this absence.
• Driving lessons.

Payment may be withheld if:

• Your attendance falls below 95%.
• You have not bought course materials (e.g. textbooks), as directed by your teacher.
• You have not attended your tutor period.
• You have missed a lesson because you want to change course. **You must wait until you receive the new timetable before changing lessons.**
• Your absence from lessons has not been authorised.
• You did not attend your work placement or an Academy trip/event.
• You did not see relevant teachers if you went home sick.
• Poor behaviour – this may be non-completion of work or antisocial behaviour.
• You are regularly late to school.
• Non-completion of homework.

*This list is not necessarily complete.*

**Change of Financial Circumstances**

Any student in receipt of a bursary has a duty to inform the school if their financial circumstances change, or those of their parents/guardian/carer(s) change. This does not automatically mean any future bursary payments will be stopped.

If you have any queries about the bursary award you should contact your tutor. This information is correct at the time of publication but is subject to change as information and guidance from the government Department for Education is published.

Please note: by signing this form, students accept that discretionary bursary payments vary and are not equal amounts for all students. Students agree not to disclose the amount they receive to any other student.

**I HAVE READ THIS AGREEMENT CAREFULLY**

<table>
<thead>
<tr>
<th>Student Name</th>
<th>Tutor Group</th>
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</table>

<table>
<thead>
<tr>
<th>Student signature</th>
<th>Date</th>
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<tbody>
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<td></td>
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<table>
<thead>
<tr>
<th>Parent signature</th>
<th>Date</th>
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<td></td>
<td></td>
</tr>
</tbody>
</table>
# Bursary Fund Application

## 1. Personal Details

| Name: |  |
| Date of Birth: | Tutor Group: |
| Address: |  |
| Mobile: |  |

## 2. Residential Details

2.1 Have you ever lived outside of the UK or EU?

| YES | NO |
| (If ‘Yes’ please complete section 2.2 onwards. If ‘No’ continue to section 2.4) |

2.2 What date did you enter the UK or EU?

2.3 What is your current status? Please note you will need to show proof of your residential status.

| Refugee | Leave to remain | Asylum Seeker | Humanitarian Protection |

2.4 Please tick the option that best describes your living situation

| Lives with Parents who have responsibility for you | Live in Local Authority Care | Lives on own |
| Live with Carers/ Guardians who have responsibility for you | Other | (please specify below) |

2.5 Are you in Local Authority Care, a Care Leaver or Living with Foster Parents? Please note you will need to provide a Social Services letter to confirm.

| YES | NO |

2.6 Do you currently receive any of the following in your own name? Please note you will need to provide a letter from the Department for Work and Pensions to confirm.

| Income Support or Universal Credit | Employment Support Allowance |
| Disability Living Allowance or Personal Independence Payments |

2.7 Are you in receipt of Free School Meals

| YES | NO |
4. PRIVACY NOTICE/ LEARNER DECLARATION

The information you provide on this form will be used to access your eligibility for either the Vulnerable Bursary or the 16-19 Discretionary Bursary. All evidence will be treated as confidential.

I can confirm that all the information on this form and evidence provided is correct.
I understand that this form does not guarantee me entitlement to the bursary fund.
I understand I must adhere to the terms and conditions of the student learning agreement.
I understand that if I do not adhere to these terms and conditions, I may not receive the bursary payment.
I understand that all payments must be made directly into a bank account in my name.
I understand that if I leave Southfields Academy Sixth Form during the academic year, I will not be eligible to receive further payments from Southfields Academy Bursary.

SIGNED (BY STUDENT):
DATE:

Please note, should you be eligible for the bursary fund, payments will be made into a bank account in the STUDENT name only. Students will therefore need their own bank account.
# PERSONAL DETAILS

1. I am/ We are the adults mainly responsible for:

2. Fill in the details below if you are the adults responsible for the student and they live with you

<table>
<thead>
<tr>
<th>ADULT 1</th>
<th>ADULT 2</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Surname/ Family Name</strong></td>
<td></td>
</tr>
<tr>
<td><strong>First Name</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Relationship to student</strong></td>
<td></td>
</tr>
</tbody>
</table>

# INCOME – for the tax year 2019/20

2.1 The easiest way to tell us about your household income is from your Tax Credits Award notice letter (TC602). This letter will record your household income.

I am including the Tax Credits notice: YES ☐ NO ☐

Total income recorded on the form: £

2.2 Do you receive a Means Tested Benefit?

YES ☐ NO ☐

2.3 If you have answered YES to section 2.2 please tick all the types of support you receive:

- Universal Credit
- Job Seekers Allowance
- Child Tax Credit
- Personal Independence Payment (Disability Allowance)
- Working Tax Credit
- Pension Credits
- Other (Please Specify)
2.4 Please fill in the below to outline your household income:

<table>
<thead>
<tr>
<th></th>
<th>ADULT 1</th>
<th>ADULT 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total earnings from all jobs (before taking off Tax and NI)</td>
<td>£</td>
<td>£</td>
</tr>
<tr>
<td>Total income from self employment</td>
<td>£</td>
<td>£</td>
</tr>
<tr>
<td>Child Tax Credit</td>
<td>£</td>
<td>£</td>
</tr>
<tr>
<td>Working Tax Credit</td>
<td>£</td>
<td>£</td>
</tr>
<tr>
<td>Universal Credit</td>
<td>£</td>
<td>£</td>
</tr>
<tr>
<td>Personal Independence Payment</td>
<td>£</td>
<td>£</td>
</tr>
<tr>
<td>Job seekers allowance</td>
<td>£</td>
<td>£</td>
</tr>
<tr>
<td>Carers allowance</td>
<td>£</td>
<td>£</td>
</tr>
<tr>
<td>Other (please state)</td>
<td>£</td>
<td>£</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>£</td>
<td>£</td>
</tr>
</tbody>
</table>

Please note that evidence for the above will need to be provided.

2.5 Please identify which total household income band you fall into:

- Band 1- Annual household income of £18,170 or less [ ]
- Band 2- Annual household income between £18,170 - £23,917 [ ]

3. Please add here any other information to support your application:

4. PARENT DECLARATION

The information you provide on this form will be used to access your child’s eligibility for either the Vulnerable Bursary or the 16-19 Discretionary Bursary. All evidence will be treated as confidential.

I can confirm that all the information on this form and evidence provided is correct.

I understand that this form does not guarantee my child entitlement to the bursary fund.

I understand my child must adhere to the terms and conditions of the fund, including the conditions of the student learner agreement.

I understand that if my child does not adhere to these terms and conditions, they may not receive the bursary payment.

I understand that all payment must be made directly into a bank account in my child’s name.

I understand that if my child leaves Southfields Academy Sixth Form during the academic year, my child will not be eligible to receive further payments from Southfields Academy Bursary.

SIGNED (BY ADULT): DATE: