

# The Mercian Trust

## 16-19 Bursary Fund Policy 2021-22

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

## 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](mailto: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 30<sup>th</sup> 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.

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	£1,200
B	Students with family income below £16,190, not on free school meals	£1,000
C	Students with family household income between £16,191 - £25,000	£850

### **Important**

- For Tiers B and C - 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](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 (i.e. Tier B student eligible for £1,000 award but with needs of only £400, the amount made will be limited to £400).

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

- Public transport to and from school – termly or monthly bus passes (students are required to claim for travel expenses in October, this will be followed by bus passes issued by the Trust).
- School uniform / sports kit
- 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 – depending on the Tier awarded. Tiers B & C may be awarded a daily sum towards their meals
- Other equipment – we may be able to contribute up to **£150 for a laptop used solely by the student**
- 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 paid, they must complete the following steps:

- a) Students are required to complete an Excel claim form (Annex 1) to confirm their claims.
- b) The completed form and receipts must be emailed to [bursary@the.merciantrust.org](mailto:bursary@the.merciantrust.org) in order for the claims to be processed. Please include your name and school in the title of the email.
- c) If a bursary is awarded towards school meals, a daily amount is credited to the student's meal account. Unused amounts cannot be carried forward. Students may have to top their account up for additional food
- d) In certain instances the school will make payments on behalf of the students. Please also note that some items may not be fully funded.
- e) 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 <sup>th</sup> October 2021
2	Friday 10 <sup>th</sup> December 2021
3	Friday 4 <sup>th</sup> February 2022
4	Friday 25 <sup>th</sup> March 2022
5	Friday 20 <sup>th</sup> May 2022

### **Important**

- It is imperative that all claims and receipts are emailed to [bursary@the.merciantrust.org](mailto:bursary@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).

**Annex 1**

**The Mercian Trust  
16-19 Bursary Funding Claim Form 2021-22**



<b>First Name</b>		<b>Surname</b>	
<b>School Attended</b>		<b>Form</b>	

<b>Please list item(s) purchased by receipt</b>	<b>Type of cost <i>(please select)</i></b>	<b>Date on receipt <i>(DD/MM/YY)</i></b>	<b>Total Amount</b>	<b>Receipt available <i>(please select)</i></b>
		<b>Total Spent</b>	<b>£0.00</b>	

**IMPORTANT NOTES**  
 Please ensure you have read our 16-19 Bursary Policy 2021-22 prior to completing this form.

In order for your claim to be processed, all corresponding receipts along with this completed form **MUST** be emailed to: [bursary@the.merciantrust.org](mailto:bursary@the.merciantrust.org), please include your name and school in the title.

All claims and receipts must be submitted by the due dates in order for payments to be made 5 times per year. Any claims made after the dates below will be rolled over to the next claim period.

**Bursary Claim Due Dates**

**Friday 15th October 2021**  
**Friday 10th December 2021**  
**Friday 4th February 2022**  
**Friday 25th March 2022**  
**Friday 20th May 2022**