

Mercia School

16-19 Bursary Fund Policy

2023/24

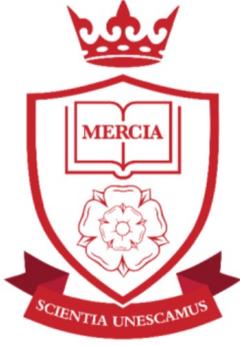


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This policy has been approved by the Local Governing Body and has been signed by the Chair of Governors	
Approval date	October 2023
Date of Review	September 2024



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Equality Impact Assessment

Under the Equality Act 2010 we have a duty not to discriminate against people on the basis of their age, disability, gender, gender identity, pregnancy or maternity, race, religion or belief and sexual orientation.

This policy has been equality impact assessed and we believe that it is in line with the Equality Act 2010 as it is fair, it does not prioritise or disadvantage any pupil and it helps to promote equality at this school.



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16-19 Bursary Fund 2022/23 Policy, Procedures and Application

1. Introduction

The 16-19 Bursary Funds are paid by the Education & Schools Funding Agency (ESFA) to Schools and Colleges so that they may provide financial help to scholars, whose access to education may be inhibited by limited financial resources. They may be used typically for:

- Transport
- Books and Equipment – on production of receipts, or if purchased directly by Mercia Collegiate Sixth Form (MCSF) (e.g. textbooks, folders)
- Meals in School
- Additional Course Costs (e.g. residential trips)
- Costs of travel to higher education interviews
- Other discretionary areas

2. Policy Aims

2.1 To ensure that the 16-19 Bursary Fund is administered in accordance with DfE/ESFA guideline and policies

2.2 To explain the procedure for making applications

2.3 To explain the eligibility criteria for the awards, especially those that relate to the scholar's attendance and commitment to MCSF

2.4 To explain the appeals procedure

3. Criteria and Eligibility for 16-19 Bursary Funds

Details of the criteria to be used and the eligibility for payments are shown at **Appendix 1**

4. Application Procedure

1. Access the bursary application form via the MCSF Bursary 16+ portal [Mercia Collegiate Sixth Form \(applicaa.com\)](https://www.mercia.ac.uk/apply). Complete the form in detail, providing all necessary supporting evidence
2. Submit the form by the stipulated deadline

5. Evidence Required

Applicants must provide supporting evidence:

- Proof of household income (e.g., tax return, payslips).
- Proof of eligibility for Category A (e.g., official letters confirming other benefits)
- Any other relevant financial documentation.

All applications are confidential. Personal financial information will be securely stored and only accessible by relevant staff.

6. Deadlines

All applications must be submitted by Friday 20th October 2023. Late applications will be considered only in exceptional circumstances. Eligible applicants will be notified by Friday 24th November.

7. Payments

Bursaries will be paid in weekly instalments to the recipient's chosen bank account once a claim has been approved. A receipt of purchase or proof of purchase must be provided for a claim to be approved. Some funds may be paid directly to departments where necessary.



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8. Reviews & Appeals

If a scholar's financial situation changes, they can request a review.

Appeals against decisions should be made in writing to Mercia School within 14 days of notification and sent to enquiries@merciaschool.com.

9. Conditions

Recipients of the bursary must maintain an excellent record of attendance and behaviour. Details of expectations are outlined in Appendix 1 and termed 'Commitment Conditions'. Failure to do so may result in withdrawal of the bursary.

10. Confidentiality

All applications are confidential. Personal financial information will be securely stored and only accessible by relevant staff.

11. Review of Policy

Mercia Trust Finance Office will review the policy annually, in accordance with recommendations from the Academy's audit services and ESFA requirements.

12. Contact

Any queries, please email enquiries@merciaschool.com



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Appendices

Appendix 1

Criteria and eligibility for payment

follows: MCSF has been allocated a fixed sum of money for the 16-19 Bursary Fund. Funding is received from DfE on the basis of numbers of the scholar population on roll at MCSF in the prior year. In the inaugural year numbers were based on expected entry figures. 5% of the total will contribute towards administrative costs, while 10% contingency will be held back in Term 1 for applications during the course of the year. The remaining 85% will be prioritised and allocated in accordance with the Policy as

Category A - Guaranteed Bursary Group:

These scholars will usually receive £1,200 for the year based on enrolling on a Full Time (ESFA funded) course and meeting the scholar "Commitment Condition" requirements stated below.

Guaranteed Bursary scholars are:

- Young people in care
- Care leavers
- Young people personally in receipt of income support, e.g. Universal Credit
- Disabled young people in receipt of Employment Support Allowance who are also in receipt of Personal Independence Payment

Evidence will be required by MCSF and can be provided via the Bursary 16+ online application form.

Category B - Discretionary Bursaries Group

These are awarded with regard to individual need as indicated on the application form. Household income will not be the sole factor in determining the level of award and scholars are advised to indicate their particular financial needs to access their education at MCSF.

Level 1 - Scholars who are entitled to Free School Meals:

Scholars who have successfully claimed Free School Meals for the current academic year 2022/23 will be awarded, on receipt of an application form, a sum afforded by the fund in relation to the number of eligible scholars in the year.

Evidence will be required by MCSF and can be provided via the Bursary 16+ online application form.

Evidence needed: Employment Earnings (P60/payslips), Benefits annual award statement from the Government for 2023/24 or 3 recent months' Universal Credit letters or evidence of earnings if self-employed (most recent return to HMRC supplemented by bank statements).

The remaining sum ("residual fund") will be allocated according to the process below, i.e. after deductions above have been made for scholars who receive Free School Meals (FSM):



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Level 2 - Shared Residual Allocation:

Scholars whose home household income is less than £17,005.00. Please note that the total household income includes benefits received and that individual circumstances will be considered.

Evidence will be required by MCSF and can be provided via the Bursary 16+ online application form.

Evidence needed: Employment Earnings (P60/payslips), Benefits annual award statement from the Government for 2023/24 or 3 recent months' Universal Credit letters or evidence of earnings if self-employed (most recent return to HMRC supplemented by bank statements).

The size of maximum payment depends upon the number of applicants.

Level 3 - Shared Residual Allocation:

Scholars whose home household income is between £17,005.00 - £20,000.00. Please note that the total household income includes benefits received and that individual circumstances will be considered.

Evidence will be required by MCSF and can be provided via the Bursary 16+ online application form.

Evidence needed: Employment Earnings (P60/payslips), Benefits annual award statement from the Government for 2023/24 or 3 recent months' Universal Credit letters or evidence of earnings if self-employed (most recent return to HMRC supplemented by bank statements).

The size of maximum payment depends upon the number of applicants.

Level 4 – One-off Discretionary Payments:

Scholars whose household income is between £20,000 and £28,000. These scholars will be considered for funding, subject to availability. In some cases awards may not be made until after the Autumn Term. Scholars in this group may get a small award if the scholar has met all the 'Commitment Conditions' and there is a sufficient balance in the fund.

Evidence will be required by MCSF and can be provided via the Bursary 16+ online application form.

Evidence needed: Employment Earnings (P60/payslips), Benefits annual award statement from the Government for 2023/24 or 3 recent months' Universal Credit letters or evidence of earnings if self-employed (most recent return to HMRC supplemented by bank statements).



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Commitment Conditions

To continue to receive a bursary a scholar must satisfy the following conditions:

1. The scholar must have no unauthorised and unexplained absence from or lateness to lessons at Mercia Collegiate Sixth Form
2. The scholar must sit all his/her examinations
3. The scholar must keep up to date with all class and homework
4. The scholar or parent/carer must not owe money to MCSF for other purposes.

Scholars' attendance will be reviewed termly before payments are made for the term ahead as detailed in the above Policy. In order for payment to be authorised, scholars must have zero unauthorised absences since the last review or since the start of the course (if Term 1). Scholars have a fresh start after each review thus allowing a Spring or Summer term payments to be possible even if they did not qualify in the Autumn term. This attendance review will take place centrally and scholars with unauthorised absences will be invited to discuss this with the Director of Sixth Form or Head of Sixth Form within one week before the payment is suspended.

No Recourse to Public Funds

Scholars with this status may be eligible to discretionary funding based on financial need as indicated on the application form, but awards must be to pay for items of assistance directly (e.g. equipment, travel to an interview) because awards of cash are not permitted.

In-Year Applications and the Contingency Fund

Applications received after the Autumn Term will be from the Contingency Fund (10% of the total Bursary Fund allocated to the school). An estimate of the "residual funds" figure will be made by the Mercia Trust Finance Department. This means that level 3 payments may vary according to the "residual funds" available by Term 3. Applications after Term 1 will also be pro rata based on the scholar enrolment date and academic year.

Exceptional cases and Contingency Fund

A small proportion will be reserved from the contingency for exceptional cases at the discretion of the Headteacher to respond to atypical need not identified through the standard assessment procedures.