



**Matrix**  
**Academy Trust**  
EDUCATION WITHOUT EXCEPTION

# Sixth Form Bursary Fund Policy

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*To be read alongside all relevant Matrix Academy Trust policies and procedures*

## 1. Background

The Department for Education (DfE) established the 16-19 Bursary Fund to support those students who really need to access funds in order to support their learning and their progression to further learning. This may be spent on things like (not exhaustive):

- transport (to and from school, where students live more than 20 minutes walk away from school);
- course books;
- equipment;
- field trips and other course-related costs;
- uniform;
- the costs of attending university interviews and open days.

This policy meets the requirements of the [Education and Skills Funding Agency \(ESFA\)'s 16-19 Bursary Fund Guide 2023-24](#), providing pupils with the opportunity to benefit from the fund at different levels according to individual circumstances.

**All payments are based on individual need.  
No blanket payments are permitted to be given for either type of bursary.**

The two types of bursary are as follows:

### **One: Vulnerable Student Bursaries**

The Trust can approve up to £1,200 of bursary funding, depending on needs, to be awarded to students who are in one of the following 'vulnerable group' as defined by the EFSA:

- 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

Students will only receive the amount they actually need to participate and will not automatically receive £1,200 if they do not need the full amount. In exceptional circumstances, the funding may be permitted – at the Headteacher's discretion - to exceed £1,200. This will be paid out of the Discretionary Bursary or the school's own funds.

### **Two: Discretionary Bursaries (household income below £30,000)**

This is based on the financial position of the student's family. To be eligible, the student's family household income must be **below £30,000** per annum, to include income from employment, pensions payments, jobseeker's allowance, all tax credits including child tax credit and working tax credit, but child benefit may be excluded.

**In exceptional circumstances**, on a case-by-case basis and at the discretion of the Headteacher, schools may provide one-off support in-kind or reimbursements to students who may not fall precisely within the two defined bursary groups.

## 2. Eligibility Criteria

For students to be eligible for the bursary fund, students must be aged over 16 and under 19 on 31<sup>st</sup> August 2024, be enrolled onto a full time course and meet the ESFA's residency criteria. Further details about that are here: [Education and Skills Funding Agency \(ESFA\)'s 16-19 Bursary Fund Guide 2023-24](#)

### 3. How to Apply

Students are required to complete the online 16-19 Bursary Funding application form in the presence of their parent/carer. For Vulnerable Bursary applications this includes confirmation of status and confirmation of income. For Discretionary Bursary applications this includes confirmation of income. All Bursaries must be paid directly into students' own bank accounts, so they must give the details of these accounts. The bank account details provided must be in the student's own name.

**Students and their parent/carer must take great care to ensure information provided to us 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.**

List of possible evidence:

- Three consecutive months' worth of wage slips for each parent/carer in the household
- Letter from H M Revenue & Customs - Tax Credit Award for the preceding year
- Current Benefit Letter from the Department for Work and Pensions (DWP)
- Proof of earnings from Employers of adults in household (P60 for the preceding year)
- Self-Assessment Tax Return (if adults in household are self-employed) for the preceding year
- Universal Credit Monthly Award Notices for the preceding three months
- Confirmation letter from Local Authority of current or recent looked after status (vulnerable group)
- Other confirmation of income

If a student becomes eligible midway through a year they can apply at any point.

Students progressing from Year 12 to Year 13 will not automatically receive Bursary payments. They will need to reapply when they begin Year 13.

The link for application forms can be found on the school websites.

### 4. 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.

A list of all pupils who are eligible must be sent to finance to monitor against and ensure only eligible pupils are awarded 16-19 bursary payments.

### 5. 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.
- Be working hard, with all work required by teaching staff submitted on time and completed to a high standard.

## **6. Claiming for items**

Students are required to complete the online 16-19 Bursary Claim Form which can be found on the school website.

**Reimbursements:** In cases where students prefer to pay up-front cost of items that they require, the school will reimburse them upon completion of a claim form and provision of an itemised VAT receipt or invoice (screengrabs are not sufficient). Please follow the BACS process in the financial procedures manual. Please be aware that, although the finance department will endeavour to pay as soon as possible, it could take up to 30 days to make payment.

**Support in-kind:** In cases where students are unable to pay up-front costs of items, the school will order items on their behalf. The school may also choose to place orders on students' behalf for course books and other materials. Please follow the purchase order process in the financial procedures manual.

## **7. 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 our complaints procedure.

## **8. Confidentiality**

Schools 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.