

# Ormiston Victory Academy 16-19 Bursary & Discretionary Fund Policy

## Policy version control

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Author	Assistant Principal – Sixth Form Principal Director of Finance & Operations
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## 16 – 19 Bursary Guidelines for Applications

Lord Nelson Sixth Form College will target the 16-19 Bursary to ensure that it reaches students who face significant barriers to participating in education and will target funds to help the students in greatest need. In doing so we have a duty to ensure that the money is spent in ways which help to break down the barriers and deal with the costs of being in education.

Applications should ideally be submitted in full by 30th September 2024. Applications made after this date will be considered providing sufficient funds are available. Please note - if you are in receipt of any benefits, these will not be affected if your child is awarded a bursary.

There are 2 different funds which are available to students.

### 1. Vulnerable Student Bursaries (known as VSB)

Students will qualify for this bursary if they fall into one of the following categories; young people in care, care leavers, young people in receipt of income support or universal credit or disabled young people in receipt of Disability Living Allowance (DLA), Personal Independence Payments (PIP) or Employment Support Allowance (ESA). The student must be aged 16, 17 or 18 on 31st August before that academic year to qualify.

Where students fall into this category they are entitled to a flat rate bursary of £1,200 of which the payment terms will be agreed on an individual basis with the Assistant Principal – Sixth Form and the student.

Students must provide official confirmation of their qualification for a VSB, for example a letter from the local authority or a letter from the Department of Work & Pensions (DWP) stating which benefit the young person is entitled to. Please note students cannot self-certify.

*Parents/Carers will also be asked to provide evidence of income/benefits/savings so that financial need can be assessed.*

### 2. Discretionary Fund (known as a “bursary”)

Lord Nelson Sixth Form College will operate a discretionary payment system for specific educational purposes.

Eligibility will be determined via this formal application. Eligibility for the bursary is based on gross annual household income and the family circumstances. We will be operating two levels of bursary funding based on income bands. Free School Meals from Year 11 is not an automatic acceptance for bursary; students must apply for the bursary in Year 12 and re-apply in Year 13.

Examples of acceptable supporting evidence for the Discretionary Fund are:

- A full T602E Tax Credit Award Notice (TCAN) for the young person’s household. This document from HM Revenue & Customs details entitlement to Tax Credits and shows the total income for the year.
- Other Income Support or Universal Credit award letters that show evidence of income.
- P60 End of Year Certificate for all adults in the young person’s household who contribute to household costs. This certificate is a statement of earnings from an

employer. It must be for the correct adult(s) and for the correct Tax Year (to 5 April 2019). The income will be shown as Total for the Year.

- Payslips from the previous 3 months.
- Self Assessment Tax Calculation (SA302). This is the equivalent of the P60 for self employed people. It must be for the correct adult(s) and for the correct Tax Year. The income will be shown as Total for the Year.
- Evidence of other benefits, pension awards, etc.

### **Level A**

You could receive this level of funding if you have a gross annual household income of £20,000 or less and meet the qualifying condition requirements as detailed below. If you are in this category you can expect to receive £3.00 for lunch for every day your child attends school during term time. This will be paid into your child's bank account on a 4 weekly basis. You can also apply for additional support for the items specified below.

### **Level B**

You could receive this level of funding if you have a gross annual household income of £20,001 to £26,000 and meet the qualifying condition requirements as detailed below. If you are in this category you can claim for the items specified below.

## **Specified items covered by the Bursary**

Bursaries from Lord Nelson Sixth Form College can only be spent on certain items which are deemed to be the costs of accessing education. They are:

1. Lunch whilst at Sixth Form
2. Stationery
3. Equipment
4. Books
5. Specialist clothing (e.g. Beauty Uniform, protective clothing)
6. UCAS/University visits or interviews
7. Trips (directly related to your course – not extra-curricular)
8. Transport to and from Sixth Form
9. Any other exceptional items, as agreed by the Assistant Principal - Sixth Form

## **Contingency Fund**

Any student meeting general eligibility requirements and facing financial hardship due to exceptional reason or circumstance change can apply to access the contingency funds on an individual basis by submitting an application in writing.

## **Qualifying condition requirements**

Eligible students will need to complete a qualifying learning period of 6 weeks before they are able to receive Bursary payments, however, applications should be submitted in full by the deadline of 30<sup>th</sup> September. Bursary payments will be backdated to the beginning of the Autumn term subject to all conditions being met during the initial six weeks. New students to the Lord Nelson Sixth Form College may submit an application on admission and approval will be subject to funding availability. In a case of extreme hardship, consideration will be given for payment in advance of the six week period.

## Application Process and Payments

All applications (Appendix A) for a bursary fund payment are to be made to the Sixth Form Office.

Students will be advised, in writing, of the outcome of their application. All eligible bursary payments will be made via BACS transfers and students must provide bank details when applying. Cheques are not issued and support can be given to any student who wishes to open a bank account for the purposes of bursary payments.

For the specified items detailed above, these will be sourced and provided by the academy procurement system. Subsequent claims cannot be made by producing a receipt. Where the academy agrees to reimburse transport costs to and from the Sixth Form, this will be completed via BACS transfer at the next available opportunity, upon receipt of the bus ticket. You can also apply for a monthly buss pass.

Please note that Lord Nelson Sixth Form College guarantees that all personal information will be stored securely and will remain strictly confidential. At the time of producing this form (August 2024), this information was correct, however, all information is subject to change.

Appendix A:

### 16-19 Bursary and Discretionary Fund Application Form 2022/23

*Please ensure you have read and understood the academy's guidelines regarding bursary applications before completing this form.*

**Please hand this form to the Sixth Form office along with any relevant photocopied evidence**

**Please indicate which fund you are applying for:**

**Vulnerable Student Bursary**  **Please complete all of the application form**

**Discretionary Bursary**  **Please complete all of the application form**

Please complete all information in BLOCK capitals:

Surname:		Forename:	
Date of Birth:	Age at 31/8/25:	Previous school name	
Home address:			
How long have you been resident in the UK?			
Home Telephone Number:		Parent Mobile Number:	
Student Mobile:		Student E Mail:	
1. Are you a young person in care?		Yes	No
2. Are you a care leaver?		Yes	No
3. Are you a young person in receipt of income support?		Yes	No
4. Are you a disabled young person in receipt of employment and support allowance and also in receipt of disability living allowance?		Yes	No

***If you answered YES to any of the above questions, please attach the required evidence of this with your application form.***

5. How many dependents under the age of 16 are there in your household?	
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6. What is your total annual household income? (Please complete the breakdown below)			<b>Total Income</b>
			£
<b>Salaried Income</b>	£	<b>Income Support/Universal Credit</b>	£
<b>Tax Credit</b>	£	<b>Other Benefits/Pensions</b>	£
<b>Self Employed Earnings</b>	£	<b>Other income</b>	£

*Please supply evidence of your household income by way of a P60, Receipt of Benefit Notification, Tax Credit Award Notification, Payslips, Other Income Support, Benefits, Pensions or Self Employed Income Notification.*

<p>7. It is important you answer the questions below so that we can make an accurate assessment of your financial need. <i>(Please use the list on page 2 for reference.)</i></p> <p>How do you travel to and from the Academy?</p> <p>What subjects/courses are you studying?</p> <p>Any items/materials you think you will need for your course/s?</p> <p>Are you planning on applying to university?</p>
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**BACS details (this must be completed for the process to continue)**

Where the bursary is paid directly to the student, it is good practice to pay by BACS transfer to their own account. EFA would not expect the bursary to be paid into another person's account, except in exceptional circumstances where a student is unable to administer their own account.

Name of Student Account:	
Name and Address of Bank / Building Society:	
Sort Code:	
Bank Account Number:	

I/We confirm that all information provided is true and I will notify school if any circumstances change. I/We understand that the bursary or discretionary award will be provided on the basis that certain conditions set by the academy and understand that money may be claimed back if I/we knowingly gave information which is discovered to be false.

Student Signature:	
Parent Signature:	
Date:	

**DATA PROTECTION DECLARATION**

The information recorded on this form is required by the academy to assess your eligibility for financial support with your studies at the Lord Nelson Sixth Form College. The information will be processed solely for that purpose. It will be treated as confidential, but may be passed to government funding agencies. Your application will be retained for 6 years.

**Academy Use Only:**

Date Received:		Number:	
VSB:		Bursary:	
Evidence Seen:	Q1-4		
	Q6		
Date of Panel:		Awarded:	
Purpose:			
Level:		Student Advised:	
BACS set up:		Start Date:	