



Cabot
Learning
Federation

Bursary Policy

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History of most recent Policy changes

[illegible]

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1 Policy Objective

- 1.1** To support CLF Post-16 students in overcoming the specific financial barriers to participation they face to allow them to remain in education.
- 1.2** The Trust aims to provide fair and equitable access to the bursary fund across its Post-16 provisions, within the framework set out by ESFA bursary fund guidance and in compliance with CLF Financial Regulations.

2 Bursary Criteria

- 2.1** Bursary entitlement is assessed against two main criteria: Student Eligibility and Student Financial Need.

2.2 Student Eligibility

- 2.2.1** A student must be aged 16 or over but under 19 on 31 August 2023 to be eligible for help from the bursary fund in the 2023 to 2024 academic year.
- 2.2.2** Students aged 19 or over are only eligible to receive a discretionary bursary if they are continuing on a study programme they began aged 16 to 18 (19+ continuers) or have an Education, Health and Care (ECH) Plan.
- 2.2.3** These two groups of aged 19+ students can receive a discretionary bursary while they continue to attend education (in the case of a 19+ continuer, this must be the same programme they started before they turned 19), as long as their eligibility continues and their institution considers they need the support to continue their participation.
- 2.2.4** Students aged 19 or over are not eligible for bursaries for vulnerable groups.
- 2.2.5** Students must meet the residency criteria in ESFA funding regulations for Post-16 provision in the 2023/2024 academic year. Please see Appendix 1 for ESFA residency criteria.
- 2.2.6** Students under 16 - Students are only eligible for bursary funding if they are aged 16 or over. In exceptional circumstances students under 16 on funded 16 to 19 programmes may be eligible i.e where the student is on an accelerated study programme.
- 2.2.7** Asylum-seeking children - Accompanied asylum seeking children those under 18 with an adult relative or partner and those aged 18 and above are entitled to education, but not to public funds. As long as an asylum seeker has not had their application for asylum refused, the bursary fund can be used to provide in-kind Student support such as books, equipment, or a travel pass. Under no circumstances should cash be given to an accompanied asylum seeker.
- 2.2.8** Unaccompanied asylum-seeking children are treated as looked after children and are eligible for a bursary for vulnerable groups ('in care' group), where they have a financial need. When they reach 18 their immigration status must be considered. If the asylum claim is decided in their favour, they continue to be eligible for a bursary as a student from a vulnerable group. Where the claim is not decided in their favour, the individual may not be able to legally stay in the UK. In this instance, once the asylum claim has been fully heard/ appeals process exhausted, the individual has no claim to public funds, but will continue to do so until this point is reached.
- 2.2.9** Distance Learning - Students accessing CLF Post-16 courses attend site. Where distance-learning arrangements are in place, students are not expected to require help from the bursary fund because they are not subject to the types of costs the bursary is intended to cover (travel, equipment, and uniform for example). Where these students require

financial help, support should be provided in-kind i.e. a temporary travel pass for the student to attend exams.

- 2.30 Distance Learning - in extenuating circumstances, distance learning arrangements may be in place i.e. remote lessons due to staff absence, emergency school closures etc. Where this is the case, costs incurred to enable course participation may be covered i.e. meals for pupils in receipt of FSM.

2.3 Student Financial Need

- 2.31 Students individual financial need must be assessed when awarding bursary funding. Blanket and flat / fixed rate payments without an assessment of actual financial need is prohibited across all Priority Groups.

- 2.31 Provisions may decide that although a young person may be eligible for a bursary, they do not have any actual financial need. This might be because their financial needs are already met and/or because they have no relevant costs. Students' applications can be refused on this basis.

- 2.33 Financial need is determined based on students' actual and reasonable **course-related costs** to enable participation, including:

- Meals on the day of study for students eligible for FSM
- Books, equipment
- Coursework materials
- Off-site curriculum visits and fieldwork
- Uniform/specialist clothing
- Transport
- University interviews/open days or job interviews
- Exam resits

- 2.34 Course costs must be reasonable i.e. students are not automatically entitled to receive support for costs incurred where the item and its cost are disproportionate in relation to course requirements. It is the responsibility of the student to liaise with the academy in advance of any purchase/ reimbursement requests where they are unsure if their request meets this reasonableness requirement.

- 2.35 It should be noted that for items of equipment including books and laptops, students will firstly be offered laptops from the academy's existing stock, which must be returned at the end of the academic year.

- 2.36 Where academies are unable to provide books and laptops from their existing stock, academies can purchase them from the student's bursary fund and must satisfy the reasonableness requirement outlined in section 2.34. These resources remain the property of the academy and students must return them once they have completed their study programme so they can be used again by another student where appropriate. If keeping equipment on site is the best way of ensuring this happens, provisions have the right to set this as a condition.

- 2.35 Bursaries cannot be used for the following:

- Learning support costs i.e. counselling, mentoring, additional tutoring
- Support for extra-curricular activities where not essential to the student's study programme
- General household income support

- As a way to incentivise/ reward attendance
- As a way to encourage students to choose CLF over non-CLF Post-16 provisions

3 Types of Bursary

3.1 There are three types of bursary available:

- Vulnerable Groups Bursary (Priority Group 1)
- Discretionary Bursary (Priority Groups 2 – 4)
- Emergency Meal Support (ad-hoc and by exception; see Section 3.3)

3.2 Vulnerable Groups Bursary

Priority	Criteria	Potential Award
1	<p>Students must meet one of the following criteria to qualify for the Vulnerable Groups Bursary:</p> <p><u>In care/ Care leavers:</u></p> <ul style="list-style-type: none"> • In care – a young person aged 16 and 17 looked after by a local authority on a voluntary basis. • Care leavers: <ul style="list-style-type: none"> - A young person aged 16 and 17 who was previously looked after for a period of 13 weeks consecutively (or periods amounting to 13 weeks), which began after the age of 14 and ended after the age of 16; or, - A young person aged 18 or above who was looked after prior to becoming 18 for a period of 13 weeks consecutively (or periods of 13 weeks), which began after the age of 14 and ended after the age of 16. <p><u>In receipt of Universal Credit</u></p> <ul style="list-style-type: none"> • In receipt of Universal Credit (UC) because they are financially supporting themselves, or financially supporting themselves and someone who is dependent on them and living with them, such as a child or partner. <p><u>Unaccompanied asylum-seeking children (see section 2.28)</u></p> <p><i>UC is now fully rolled out and so students aged 16 to 18 will no longer be in receipt of the other benefits noted below.</i></p> <p><u>In receipt of Income Support</u></p> <ul style="list-style-type: none"> • In receipt of Income Support (IS) because they are financially supporting themselves or financially supporting themselves and someone who is dependent on them and living with them, such as a child or partner. <p><u>In receipt of Disability Living Allowance or Personal Independent Payments</u></p>	<p>Up to 100% of course-related costs per section 2.2. Up to £1,200 per year.</p> <p><i>Students should only receive the amount they actually need to participate. Automatic awards of £1,200 must not be made.</i></p> <p><i>If a student's financial need exceeds £1,200, any amount over this must be paid from the discretionary bursary allocation and subject to the same eligibility/ assessment criteria.</i></p>

- Receiving Disability Living Allowance (DLA) or Personal Independence Payments (PIP) in their own right **as well as** Employment and Support Allowance (ESA) or UC in their own right

3.2 As bursary funding covers 100% of course-related costs up to £1,200 for pupils belonging to priority group 1, the academy can purchase the items noted in section 2.33 directly on a student's behalf without the student needing to pay themselves and then claim for funds to be reimbursed. These purchases can be requested by the student on the Applica portal in the 'Requests' section, where students should submit a 'purchase' request and then include all relevant details. The purchase will then be actioned by the academy and followed up with the student accordingly.

3.3 Discretionary Bursary

Priority	Criteria	Potential Award
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2	<p>Students who are unable to access other forms of Student support funding and either Parent/Carer is in receipt of:</p> <ul style="list-style-type: none"> • Universal Credit • Income Support. • Income-based Jobseekers Allowance. • Income-related Employment and Support Allowance. • Support under Part VI of the Immigration and Asylum Act 1999. • The Guarantee element of State Pension Credit. <p>Students who are unable to access any other form of Student support funding and parental income, including child tax credit and working tax credit is below £23,880</p>	Up to 100% of course-related costs per section 2.2
3	<p>Students who are unable to access any other form of student support funding and parental income, including child tax credit and working tax credit is between £23,880 to £31,840</p>	Up to 75% course-related costs per section 2.2
4	<p>Students who are unable to access other forms of Student support funding and:</p> <ul style="list-style-type: none"> • Parental income including child tax credit and working tax credit is between £31,840 and £39,800 • whose circumstances are causing them to suffer hardship and they require financial assistance, during their period of study 	Up to 50% course-related costs per section 2.2
5	<p>Students who do not fall into any of the above categories but whose circumstances are causing them to suffer hardship or who are at risk of being unable to continue their studies because of hardship.</p>	At the discretion of the Post-16 provision

Please see *Appendix 2* for the calculations used to determine the Priority Group income bandings.

- 3.31 Discretionary bursary funding is limited, as such it should be noted that students who are eligible for support are not automatically entitled to bursaries. The level of support offered may be at variance with the above based on overall cohort need relative to available funding. Where available funding is insufficient to meet the awards for students in Priority Groups 2-5 outlined above, a percentage reduction should be applied across all discretionary groups so that bursary awards match available funding

3.4 Emergency Meal support

- 3.41 A small provision from the academy's discretionary bursary funding should be retained for emergency meal support for students not in receipt of bursary funding. This provision will be equal to 1% of the discretionary bursary funding allocation.
- 3.42 This is ad-hoc support to be provided to students in financial hardship, without checks required to determine student eligibility or student financial need.
- 3.43 Academy staff should provide a lunch pass to pupils to allow them to claim a free lunch from the academy's catering facility. This should show the pupil's name and the date for the pass.
- 3.44 Academy staff must retain a record of the meals supplied to pupils so that a journal to transfer the cost of the meals provided can be actioned by the academy's finance assistant. This can be actioned on the 'expenses' section of the Applicaa system.
- 3.45 It is expected that this should only apply to a small number of students and is not intended to be a long-term solution. Where a student's situation of financial hardship is expected to continue, the academy should direct them to the bursary policy and support them in completing an application to access bursary funds.

4 Evidence requirements

4.1 Free School Meals Eligibility

For students previously attending a CLF academy, evidence of free school meal eligibility is not required as this can be obtained from the CLF data team. For students attending from non-CLF academies, evidence of prior FSM eligibility is required i.e. via CTF, a copy of their confirmation letter or some other means. This requirement is in line with the transitional protection afforded by the ESFA, meaning that all students already receiving free meals on or after 1 April 2018 continue to be eligible to receive free meals up until March 2025.

4.2 Vulnerable Groups Bursary (Priority Group 1) Evidence

Evidence of students' eligibility for Vulnerable Groups bursary funding must be submitted each year, even if this means re-submitting the same evidence as the previous year (i.e. to evidence looked-after status). This is in line with requirements for Vulnerable Group funding claims submitted to the Student Bursary Support Service.

In care/ Care leavers	Written confirmation of the student's current or previous looked-after status from the Student's Local Authority that looks after them or provides their leaving care services. This evidence can be a letter or an email, but must be clearly from the Local Authority
Recipients of UC	A copy of the student's UC Award notice, dated within the last three months. The student must be entitled to the benefit in their own right. UC claimants will be able to print off details of their award from their online account, or provide a screenshot. AND Additional documentation to confirm their independent status, for example a tenancy agreement in their own name or a supporting statement from the person providing the student with accommodation. Where it is not possible to retrieve evidence to this effect and academy staff are aware of pupils' circumstances, a member of SLT must provide a supporting statement against the pupil's bursary record. OR

	A copy of the student's Bank/Building Society statement, clearly showing the most recent Child Benefit payment
Recipients of IS	A copy of the student's most recent Income Support award notice for the current financial year. This must clearly state that the claim is in the Student's name/confirm they are entitled to the benefits in their own right. The evidence must not state any conditions that prevent them from participating in further education or training.
Recipients of DLA or PIP	A copy of the Student's Employment Support Allowance (ESA), Universal Credit Statement and Disability Living Allowance (DLA) or Personal Independence Payment (PIP) Award letter from the DWP, dated within the last three months.

4.3 Discretionary Bursary (Priority Groups 2 – 4) Evidence

The criteria for Priority Groups 2 – 4 require checks on Parent(s) / Carer(s) (P/C) household income that must be submitted at the beginning of the students' studies. In subsequent years students must provide confirmation on the Applica portal that their circumstances have not changed to the extent that their level of bursary entitlement would be affected per the conditions of their Priority Group.

P/C receiving of Tax Credits'	A copy of ALL PAGES of P/C most recent Tax Credits Award. Accepted versions will have one of the following Award letter titles: Tax Credits Award for 06/04/2023 to 05/04/2024 OR Tax Credits – Annual Review for Year Ended 05/04/23
P/C receiving Universal Credit	Copies of ALL PAGES of P/C three most recent monthly award statements.
P/C receiving Benefits	Three months worth of statements or an annual statement as applicable dated within the last 3 months
P/C not receiving Tax Credits, Universal Credit or Income related Benefits'	<u>Employed P/C:</u> A copy of your P60 for the 2022/2023 Tax Year OR Copies of three of P/C most recent payslips <u>Self-employed P/C</u> A copy of P/C SA302 for the 2022/2023 Tax Year

5 Bursary Applications

- 5.1 Applications should be submitted and administered via the Applicaa online portal and must be supported with accompanying evidence uploaded to the portal
- 5.2 Evidence must be reviewed against students' applications by the Academy to ensure that the evidence submitted meets policy requirements and is in alignment with the student's application.
- 5.3 Paper application forms will be made available to students by each Post-16 provision to ensure that all students are able to access the bursary application process. A copy of the paper application form can be found in *Appendix 3*
- 5.4 Copies received on paper application forms are to be reviewed and uploaded by Academy staff to administer the students' bursary on the online portal. Copies of paper submissions must be retained by the Post-16 provision, with the original paperwork and supporting documents returned to the student.
- 5.5 It is imperative that students are able to access support in applying for and subsequently administering their bursaries. Provisions must therefore clearly publish up-to-date information for a contact within the academy that they are able to liaise with in the event of queries.

6 Complaints

- 6.1 Where a student has any concerns or queries regarding their bursary application, in the first instance they should e-mail the bursary inbox for the relevant Academy. The complaint will then be reviewed by the CLF bursary panel.
- 6.2 The panel will comprise three members of CLF staff, with one finance representative and two Post-16 representatives. The academy receiving the complaint will reach out to colleagues to create the panel reviewing complaints as they are received.
- 6.3 Should a student feel that their concerns remain outstanding, they can then request that the complaint is escalated through the academy formal complaints process

7 Payment of bursary to Students

- 7.1 Bursary payments should be made to students as 10 monthly payments per the below schedule. These payment timelines are approximate and structured to try to ensure that students are not out of pocket and access to their course is not limited by a shortfall in bursary support;

Initial Application Deadline (Sept)	Third Friday of Term 1
First payment (Oct)	Last Friday of Term 1
November – July payment	Last Friday of the Month

- 7.2 All students are encouraged to submit their applications by the September deadline. Late applications will be accepted, however applications will close once the bursary budget has been fully utilised.
- 7.3 Where possible, support should be provided in-kind rather than as a monetary payment. The below table notes the preferred route through which course-related costs should be met. It is understood that this may sometimes not be practical and so it is expected that provisions

exercise reasonable discretion in deviating from these guidelines, ensuring that evidence requirements are met and records are maintained at student level in the Applicaa system in doing so

- 7.4** Payments will be backdated by a maximum of 3 months in line with CLF finance policy, particularly as it is recognised that students can face challenges in securing the evidence required to process their bursary applications
- 7.5** Payment of bursary will be linked to attendance where possible, to ensure that bursary payments match actual financial need.

Course-related cost	Purchasing Guidelines	Evidence required
Meals on day of study	<ul style="list-style-type: none"> Meal to be provided from on-site canteen where students are eligible for FSM Where off-site for course-related reasons, FSM students can source meals from elsewhere Where students do not have access to an on-site canteen, they can source meals elsewhere and will be paid a daily rate equivalent to the daily free school meal allowance (currently £2.41) 	<ul style="list-style-type: none"> Catering provider to provide details of FSM P16 students accessing on-site meals. The respective costs can then be reimbursed from the bursary pot to the academy budget. The students record must also be periodically updated on Applicaa to ensure that student-level bursary balances are correct. Where meals are sourced off-site by students attending provisions with on-site canteens, the student must upload a copy of meal receipts for each meal to the Applicaa portal. Students attending provisions without on-site canteens will be paid a daily rate linked with attendance.
Laptops	<ul style="list-style-type: none"> Where specialist hardware is required for a course, it should firstly be considered whether the institution should be providing equipment from their existing academy stock/ budget for general on-site use. Where this isn't possible and it is deemed that the student requires their own equipment from the bursary fund, the provision will procure the item on the students behalf. Laptops must be returned to the academy once study is complete in line with ESFA guidance. For this reason, laptops must only be awarded on a 100% contribution basis. Where the academy wishes to purchase laptops in anticipation of assigning to a student in receipt of bursary funding, the laptop will be purchased from the academy budget and charged to the bursary once the laptop has been assigned. This is only possible where the laptop is purchased and assigned to a student in the same academic year. 	<ul style="list-style-type: none"> Receipt/ invoice for the purchase of the laptop actioned by the Academy Laptop purchases can only be actioned by the academy - students/ carers must not purchase the laptop themselves.
Public transport	<ul style="list-style-type: none"> Where possible, tickets for public transport services should be purchased directly by the academy in advance as a monthly or weekly pass, depending on how term-dates fall in the relevant month. Where it isn't practical to purchase tickets on the students' behalf, money can be paid directly to the student via the bursary fund. Where travel passes are purchased on a contract basis by the academy, the purchase will be made by 	<ul style="list-style-type: none"> Where pupils purchase their own travel passes, picture evidence must be uploaded to Applicaa. In line with ESFA guidelines, it is not necessary for students to provide copies of all travel passes. Provisions can set their own evidence requirements, however as a minimum, CLF Post-16 students must provide a copy of their travel pass at

	the academy budget and then charged to the bursary pot once travel passes are assigned to individual pupils.	<p>the start of each term. Where a termly ticket is accepted, the subsequent bursary payment will cover the full term, which will be reflected in students' Applicaa accounts.</p> <ul style="list-style-type: none"> Where travel passes are purchased on a students behalf, either as an individual purchase or as part of a contract, the students record must be updated on Applicaa to maintain an overview of their bursary spend/ balance.
Course-related Cost	Purchasing Guidelines	Evidence Required
Private transport	<ul style="list-style-type: none"> Fuel costs will be subsidised where it isn't practical or feasible for the student to travel via public transport. It is expected that such cases are rare and so will be assessed and agreed on a case-by-case basis between the Academy and the student. Taxis may also be offered to pupils in exceptional circumstances (i.e. safeguarding concerns) 	<ul style="list-style-type: none"> Mileage claim to be submitted via online portal. The rate payable will depend on the vehicle used by the student – see <i>Appendix 4</i> for applicable mileage rates. Written statement from Student to confirm reason for using private transport. Copy of taxi receipt where applicable.
Other (books, uniforms, specialist clothing)	<ul style="list-style-type: none"> Where possible these should be purchased directly by the academy. Where a student is contributing towards the cost of materials, the academy will procure the item on the student's behalf once the contribution from the student/ their carer has been received. Where the academy wishes to purchase books in anticipation of assigning to a student in receipt of bursary funding, the books will be purchased from the academy budget and charged to the bursary once the books have been assigned to an individual student. This is only possible where the books are purchased and assigned to a student in the same academic year. 	<ul style="list-style-type: none"> Receipt/ invoice for the purchase of materials actioned by the Academy If for any reason the student / their carer purchases materials instead of the Academy, they should provide the Academy with a copy of the receipt
University interviews/open days/ job interviews/ off-site fieldwork	<ul style="list-style-type: none"> Where possible, tickets for public transport services should be purchased directly by the academy for the cheapest method of public transport that would enable the student to attend the full event. Where it isn't practical for the academy to purchase tickets on a students behalf, money can be paid directly to them to the value of the cheapest method of public transport that would enable the student to attend the full event. 	<ul style="list-style-type: none"> A copy of public transport receipt relating to the interview/ open day. A copy of the receipt for meal costs. A copy of documentation to demonstrate attendance (i.e. confirmation e-mail/ letter for an interview/ a screenshot to show university open day date)

	<ul style="list-style-type: none"> A student is entitled to support for meal costs where they are eligible for FSM. This should be to the value of a standard lunchtime meal deal as evidenced by their receipt. Any costs further to the above must be assessed and agreed on a case-by-case basis between the academy and the student. 	<ul style="list-style-type: none"> Any other purchases further to the above must be evidenced by receipts.
Exam Resits	<ul style="list-style-type: none"> Exam resits must be paid for by the student, which will then be reimbursed from the bursary fund once the student has sat the exam. 	<ul style="list-style-type: none"> Update of student record on Applicaa to assign resit costs to students' bursary fund.

8 CLF Bursary Funding

8.1 Funding for Vulnerable Groups (Priority 1): Draw-down

- 8.11 Funding claims for vulnerable groups will be centrally managed and claimed.
- 8.12 Funding should be drawn down from the Student Bursary Support Service (SBSS) on an ad-hoc basis throughout the year, as soon as is practicable once new students have been identified and verified.
- 8.13 Funding can be drawn down by completing and submitting a bursary for vulnerable groups funding claim via the SBSS online portal by 31st July of the relevant academic year. Any submissions made after this date will not be paid.
- 8.14 Only the amount of funding needed should be drawn down based on the student's financial need – the full £1,200 should not be drawn down if not required.
- 8.15 The SBSS portal doesn't function as a filing system, and so a copy of funding claims submitted must be retained, along with records of funding paid to them through the claims process.
- 8.16 Where unused bursaries for vulnerable groups accrue (i.e. where there is a difference between predicted and actual financial need, a student leaves etc), this funding should be recycled to offset funding claims for other eligible students until 30 April. Where there remains unused funding after this, P16 provisions can add this to their discretionary bursary allocation from 1 May.
- 8.17 Where incorrect submissions have been made, the respective funding should be recycled on subsequent Vulnerable Group funding claims. If there are no other students eligible for vulnerable group funding however, this allocation cannot be added to the discretionary bursary (as it has been claimed in error), and the central team must contact SBSS to return the funds.

8.2 Funding for Priority Groups 2 -4: Discretionary Bursary Allocation

- 8.21 The ESFA makes a lump-sum discretionary bursary allocation for provisions to distribute to individual Students based on 2 elements; 1) financial disadvantage; 2) student costs to support travel and industry placements. Please see Appendix 5 for more information on the calculation.
- 8.22 Where a Post-16 provision operates through subcontracts or from more than one location across England, the allocation is made to the lead institution. The lead institution

is responsible for ensuring the bursary fund is administered appropriately at each site, and that students are able to access support.

- 8.23 Allocations are paid by the ESFA to the Academy in 2 payments : 2/3 in September and 1/3 in April

9 Use of Bursary

- 9.1** Up to 5% of the bursary allocation may be used for administrative costs relating to the 16 to 19 Bursary Fund per the ESFA guidance.
- 9.2** The Trust will use the allocation to fund the costs of the online bursary management software and to support central staffing costs incurred in administering the bursary process. These costs taken together are currently equivalent to c. 3% of the total bursary allocation [tbc depending on central cost calculation].
- 9.3** The remaining 2% allocation can be applied for by academies to support costs directly relating to the administration of bursaries. Requests should be submitted to the Deputy Finance Director.

10 Unspent Bursary

- 10.1** Unspent bursary funds may be carried over to the bursary fund for the next academic year. The funds are ringfenced for this purpose and cannot support the academy budget.
- 10.2** Provisions must be able to confirm the amount of unspent funds carried forward from the previous year, and they must ensure that they fully use unspent funds before using the new academic year allocation.
- 10.3** The central CLF Treasury Team will maintain a reconciliation of the bursary by Academy to track bursary spend and balances.

11 Audit & Assurance

- 11.1** Bursary awards are made based on hardship. This must be substantiated by evidence at the point of application, which will be securely retained for 6 years per ESFA guidance.
- 11.2** 16 to 19 Bursary Funds are subject to audit and it is imperative that bursary applications and information are maintained at Student level.
- 11.3** The CLF operates a bursary application and administration process through an online bursary management platform that supports and satisfies audit requirements. Academy staff retain a role in ensuring and demonstrating that the guidelines per this policy document are observed.

12 Equality and Diversity

- 12.1** The implementation of this policy and its processes will not discriminate against Students on the basis of any protected characteristics as set out in equalities legislation

13 Policy Monitoring

- 13.1** This policy will be reviewed annually in line with the annual ESFA 16 to 19 Bursary Fund guidance
- 13.2** This review will be completed by the end of June each year to support the new round of applications for the subsequent academic year.

14 Matters beyond policy scope

- 14.1** Any circumstances or situations not covered by this policy must be resolved with reference to the ESFA 16 to 19 Bursary Fund Guide for the 2023-24 Academic Year, with central finance guidance and approval sought as appropriate.

Appendix 1: ESFA Funding guidance for young people 2023 to 2024 - Residency Eligibility

Residency eligibility

32: The following paragraphs set out the ESFA funding eligibility criteria for study programmes. Students only need to be eligible under any one point or sub-paragraph of the individual points or sub-paragraphs in paragraphs 38 to 40. All students eligible to start their study programme are eligible for the full duration of their study programme. Paragraphs 67 to 73 explain the main exceptions covering ineligible students for funding purposes.

33: For funding purposes, institutions must establish a student's eligibility at the start of their programme. Institutions must seek advice from their funding body regarding any case where they are having difficulty assessing student eligibility.

34: To be eligible for funding the student must have the legal right to be resident in the United Kingdom at the start of their study programme. A person subject to a Home Office deportation order will ordinarily be ineligible for funding until their situation has been resolved to the satisfaction of the Home Office. Students whose immigration permission to enter the UK is as short stay foreign visitor (also commonly known as a Tourist visa) are also ineligible for 16 to 19 funding.

35: In determining student eligibility, institutions must also satisfy themselves that there is a reasonable likelihood that the student will be able to complete their study programme before seeking funding for the student. This should include the practicality of providing a place for a student who may be unable to complete their programme if they are likely to leave the country permanently during their study programme. For the purposes of this paragraph, institutions must assume that all EEA students resident in the UK before 1 January 2021 have the legal right to remain in the UK for the duration of their study programme. Once a student is enrolled, the institution is expected to take all reasonable steps to ensure that the student can complete their programme.

36: Students who are attending programmes of more than one term's duration and are eligible for funding at the start of their programme, will usually be eligible for funding for the whole duration of their study programme as well as subsequent funded study programmes studied immediately end-on to their initial funded programme. This includes students studying consecutive study programmes with no break in studies other than normal holiday periods. Similarly, students who are not eligible for funding at the start of their study programme are very unlikely to become eligible for funding during the period of their study programme.

Definition of ordinarily resident

37: For funding purposes, ESFA regards as ordinarily resident in a given country any person who habitually, normally and lawfully resides from choice and for a settled purpose in that country. Temporary absences from the relevant area should be ignored.

Someone who has not been ordinarily resident because he or she or the person's parent or spouse or civil partner was working temporarily abroad will be treated as if they have been ordinarily resident in the relevant area.

Students eligible for funding

38: The following persons will be eligible for funding (these groups correspond to some of the groups in Schedule 1 to the Education (Fees and Awards)(England) Regulations 2007 (as amended):

- a person on the 'relevant date'^{[\[footnote 1\]](#)} who is 'settled' in the UK, and who has been ordinarily resident in the UK and Islands (that is including the Channel Islands and the Isle of Man) for the 3 years preceding the 'relevant date'. 'Settled' means having either indefinite leave to enter or remain (ILE/ILR), being an Irish citizen or having the right of abode in the UK. Students who are eligible for funding include:
 - British citizens who hold a United Kingdom of Great Britain and Northern Ireland passport
 - Irish citizens
 - European Union citizens or family members of EEA and Swiss workers (resident in the UK before 1 January 2021) with settled status
 - students who are children of Turkish workers where the Turkish worker has been lawfully employed and resident in the UK before 1 January 2021
 - British Dependent Territory Citizens (now known as British Overseas Territory Citizens)
 - those whose passports have been endorsed to show they have right of abode in the UK
 - those who have a certificate of naturalisation or registration as a British Citizen
 - those with Hong Kong British National (Overseas) (BN(O)) visa who have been given Home Office permission to reside in the UK

39: In addition to the groups outlined above, ESFA will also consider the following groups of students (including those who may not have lived in the UK for the last 3 years) to be eligible for funding:

- people with refugee status (RS) or humanitarian protection (HP) or discretionary leave (DL) or exceptional leave to enter or remain (ELE/ELR), their spouses, civil partners and children

- people with recently settled status (this means those having been granted indefinite leave to enter or remain, right of abode or British citizenship within the 3 years immediately preceding the start of the course) -people granted pre-settled status following our exit from EU

40: In addition to the groups above, ESFA will also consider the following groups of students (including those who may not have lived in the UK for the last 3 years), aged up to and including the age of 18, as eligible for funding as follows:

- those who are accompanying or joining parents or spouses or civil partners^{[\[footnote 2\]](#)} who have the right of abode or leave to enter or remain in the UK (or accompanying or joining relevant family members, usually parents, who are UK or Irish citizens), or those who are children of diplomats
- those who are dependants of teachers coming to the UK on a teacher exchange scheme
- those who are residing legally in the UK (including those entering the UK in the last 3 years who are or were not accompanied by their parents) who are British (or Irish) citizens or those whose passports have been endorsed (or as part of move to digital immigration systems, either a biometric residency permit (BRP), or an equivalent digital status and/or an endorsement letter) to either show they have the right of abode in this country or to show that they have no restrictions on working in the UK
- those who are dependants of adults residing legally in the UK who have been given immigration rights as workers to reside in the UK
- those who are dependants of foreign students where the accompanying parent or legal guardian has a student visa (the accompanying parent or legal guardian is excluded from our funding as set out in paragraph 71)
- asylum seekers
- those having been granted leave under section 67 of the [Immigration Act 2016](#) (the 'Dubs' amendment)
- those having been granted Calais leave to remain
- those who are (including unaccompanied asylum seekers) placed in the care of social services or those in receipt of Section 4 support

41: In addition to considering students in the categories listed in the 3 paragraphs above, the funding body will consider other exceptional circumstances. When an institution believes that a student should be considered for ESFA funding under exceptional circumstances, it must contact ESFA for guidance before claiming funding.

Appendix 2 – Priority Groups 2-4 Income Thresholds

To determine the income thresholds applicable across Priority Groups 2-4, reference has been made to the national low-income threshold. A household is deemed to be low income where they live on 60% of the UK's median income

The median income for the UK based on the most recent 'People in low income households' government report was £28,500 as at March 2020 (see Figure 1). For the purposes of this policy, this has been multiplied by 5% to provide a current figure adjusted for the increase in median annual earnings since 2020 (see Figure 2). This has then been multiplied by 1.33 to provide an equivalised median income figure that takes the student into account as an additional member of the household (See Figure 3)

Priority Group 2 threshold: $\text{£}17,500 / 0.6 = \text{£}28,500 \times 1.05 = \text{£}29,925 \times 1.33 = 39,800 \times 0.6 = \text{£}23,880$

Priority Group 3 threshold: $\text{£}39,800 \times 0.8 = \text{£}31,840$

Priority Group 4 threshold: £39,800 (median income for UK household with one child)

Figure 1

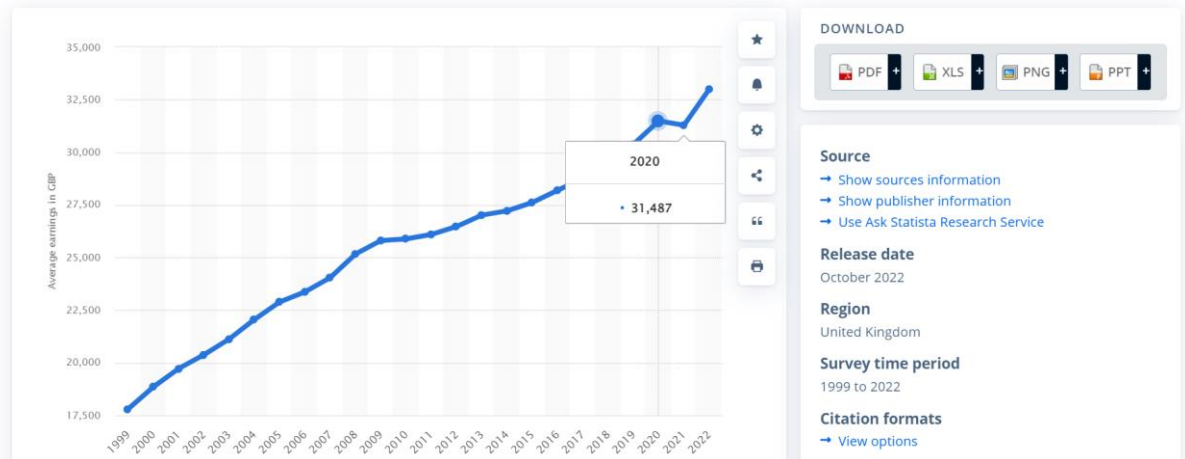
1. Main facts and figures

Due to the impact of the coronavirus (COVID-19) pandemic on data collection and sample composition, 2020/21 HBAI estimates by ethnicity were not published. Please refer to the [Technical Report: Assessment of COVID-19 on the HBAI statistics](#) for FYE2021 for further information. Three-year average data is available to 2017/18-2019/20.

- between April 2008 and March 2020, people in Pakistani and Bangladeshi households were consistently the most likely out of all ethnic groups to live in low income households, before and after housing costs
- people in White British households were consistently the least likely to live in low income households
- a household is in low income if they live on less than 60% of the UK's median income (a couple with no children would be in low income with an annual household income of up to £17,100 before housing costs and £14,800 after housing costs)

Figure 2 (taken from Statista.com)

Median annual earnings for full-time employees in the United Kingdom from 1999 to 2022 (in GBP)



Median annual earnings for full-time employees in the United Kingdom from 1999 to 2022 (in GBP)

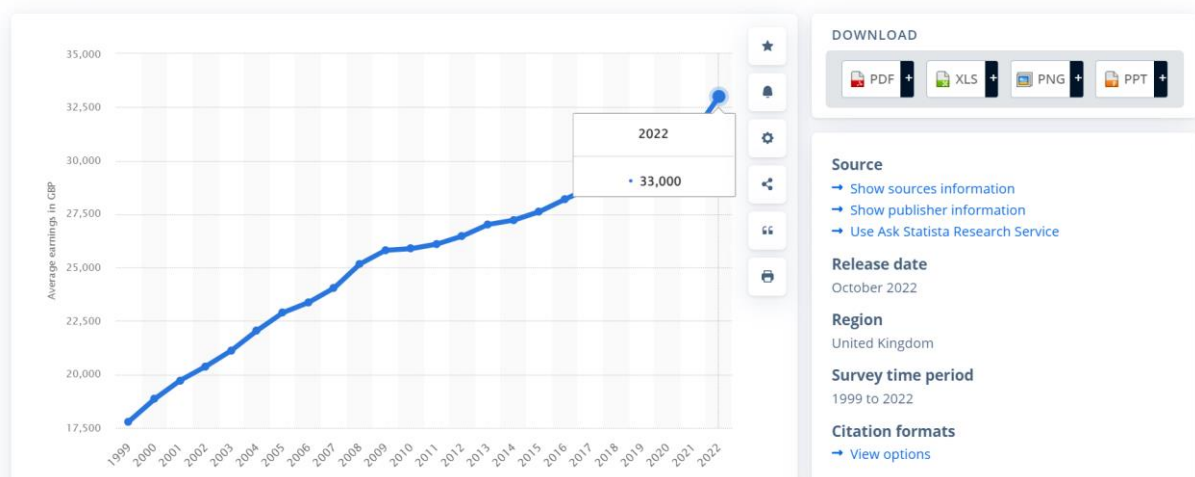
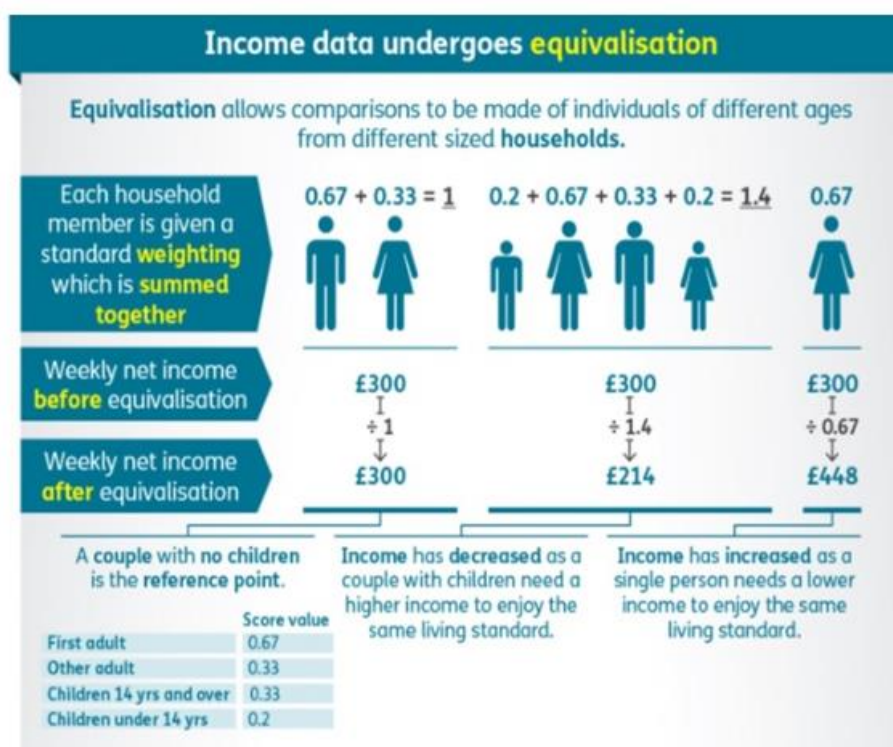


Figure 3



Equivalence scales

	Modified OECD to equivalise BHC results rescaled to couple without children=1[1]	OECD 'companion' Scale to equivalise AHC results	McClements BHC	McClements AHC
First Adult	0.67	0.58	0.61	0.55
Spouse	0.33	0.42	0.39	0.45
Other Second Adult[2]	0.33	0.42	0.46	0.45
Third Adult	0.33	0.42	0.42	0.45
Subsequent Adults	0.33	0.42	0.36	0.40
Children aged under 14yrs[3]	0.20	0.20	0.20	0.20
Children aged 14yrs and over[3]	0.33	0.42	0.32	0.34

Appendix 3 – Paper-based application form

PART A: Student Details (to be completed by the Student in BLOCK CAPITALS)

A1	Surname/Family Name																	
	First Name(s)																	
	Date of Birth				-											Age on 31/08/2023	YEARS	MONTHS
	Address:																	
	House Name/No.																	
	Street																	
	Town/City																	
	County																	
	Postcode																	
	CLF Post-16 Provision (circle)	CLF POST-16					DIGITECH					WINTERSTOKE						

PART B: Student Bank or Building Society Details (to be completed by the Student in BLOCK CAPITALS)

B1	Full Name of Account Holder															
	Name of Bank/Building Society															
	Branch Address															
	Bank Sort Code				-											
	Bank Account Number															
	Building Society Roll Number (if applicable)															

Please provide evidence of the Student's account details (see Part B of Guidance Notes)

PART C: Eligibility

Priority Group 1 Eligibility (to be completed by the Student)

C1	Are you in Local Authority care, a care leaver or living with Foster Parents?	YES	NO
C2	Are you receiving Universal Credit in your own name, because: <ul style="list-style-type: none"> You are financially supporting yourself, <u>OR</u> You are financially supporting yourself and someone who is dependent on you and living with you, such as a child or partner 	YES	NO
C3	Are you receiving Income Support in your own name, because: <ul style="list-style-type: none"> You are financially supporting yourself, <u>OR</u> You are financially supporting yourself and someone who is dependent on you and living with you, such as a child or partner 	YES	NO
C4	Are you receiving Disability Living Allowance or Personal Independence Payments in your own right as well as Employment and Support Allowance or Universal Credit in your own right?	YES	NO

If you answered 'YES' to any of the questions above:
Please provide relevant evidence (see 'Evidence of Priority 1 Group Eligibility' section of the Guidance Notes)
Move to Section D of this form

Priority Groups 2 – 5 Eligibility

Parental/Carer Income Details (to be completed by the Parent/Carer(s))

C5	Has the student been eligible for Free School Meals in the past?	YES	NO
----	--	-----	----

If answered 'YES' - please provide a copy of your confirmation letter

C6	Annual Income – Parent/Carer(s) in receipt of Tax Credits					
	Pre-Tax Earned Income	£	Working Tax Credits	£	Child Tax Credits	£

Please provide a copy of ALL PAGES of your most recent Tax Credit Award

C7	Annual Income – Parent/Carer(s) in receipt in Universal Credit			
	Take Home Pay (Month 1)	£	Universal Credit Payment (Month 1)	£
	Take Home Pay (Month 2)	£	Universal Credit Payment (Month 2)	£
	Take Home Pay (Month 3)	£	Universal Credit Payment (Month 3)	£

Please provide copies of your three most recent monthly award statements

C8	Annual Income – Parent/Carer(s) in receipt of Benefits				
	Parent/Carer(s) Name(s)			Relationship to Student	
	Adult 1				
	Adult 2				
	Type of Benefit	Adult 1		Adult 2	
	Income Support	£		£	
	Income Based Job Seeker's Allowance (JSA)	£		£	
	Income Related Employment & Support Allowance (ESA)	£		£	
	Support under Part VI of the immigration & Asylum Act	£		£	
	Guarantee element of State Pension Credit	£		£	
	Child Benefit	£		£	
	Housing Benefit	£		£	

Please provide a copy of your Benefit Award letter, dated within the last 3 months

C9	Annual Income – Parent/Carers(s) NOT in receipt of Tax Credits, Universal Credit or Income related Benefits	
	Employed Annual Income 2022/2023	£
	Self-employed Annual Income 2023/2023	£

Please provide evidence of your 2022/2023 annual income (see 'Supporting Evidence' section of the Guidance Notes)

PART D: Contact Details (to be completed in BLOCK CAPITALS)

D1	Student's email	
	Parent/Carer(s) email	

PART E: Privacy Notice & Declaration

E1	<p>The information you provide on this form will not be passed to any other organisation and will only be used to assess your eligibility for an award from the CLF Post-16 Bursary Fund.</p> <p>In signing this form, you are confirming that you have read, understood and agree with the information and conditions laid out in the CLF Bursary Policy and Bursary Guidance notes.</p> <p>In signing this form, you are making a declaration that the information you have provided is correct and complete to the best of your knowledge and belief. Please be aware that giving false or incomplete information that leads to incorrect/overpayment may result in future payments being stopped and any incorrectly paid funds being recovered.</p>									
	Student's Signature		DATE			-		-		
	Parent/Carer's Signature		DATE			-		-		

Please ensure that BOTH the Student and the Parent/Carer(s) sign and date the application form, where applicable

Appendix 4 – Private transport mileage rates

Petrol

Engine size (cc)	Mean MPG	Fuel price (per litre)	Fuel price (per gallon)	Rate per mile	Advisory fuel rate
Up to 1400	51.9	144.7 pence	657.6 pence	12.7 pence	13 pence
1401 to 2000	44.1	144.7 pence	657.6 pence	14.9 pence	15 pence
Over 2000	28.8	144.7 pence	657.6 pence	22.8 pence	23 pence

Diesel

Engine size (cc)	Mean MPG	Fuel price (per litre)	Fuel price (per gallon)	Rate per mile	Advisory fuel rate
Up to 1600	60.7	155.5 pence	707.1 pence	11.7 pence	12 pence
1601 to 2000	49.8	155.5 pence	707.1 pence	14.2 pence	14 pence
Over 2000	38.8	155.5 pence	707.1 pence	18.2 pence	18 pence

LPG

Engine size (cc)	Mean MPG	Fuel price (per litre)	Fuel price (per gallon)	Rate per mile	Advisory fuel rate
Up to 1400	41.5	89.8 pence	408.2 pence	9.8 pence	10 pence
1401 to 2000	35.3	89.8 pence	408.2 pence	11.6 pence	12 pence
Over 2000	23.0	89.8 pence	408.2 pence	17.7 pence	18 pence

Electric

The advisory electric rate for fully electric cars is 9 pence per mile.

Hybrid cars are treated as either petrol or diesel cars for advisory fuel rates.

The advisory fuel rates for petrol, LPG and diesel cars are shown in these tables.

You can use the previous rates for up to 1 month from the date any new rates apply.

From 1 June 2023

Engine size	Petrol — rate per mile	LPG — rate per mile
1400cc or less	13 pence	10 pence
1401cc to 2000cc	15 pence	12 pence
Over 2000cc	23 pence	18 pence

Engine size	Diesel — rate per mile
1600cc or less	12 pence
1601cc to 2000cc	14 pence
Over 2000cc	18 pence

Appendix 5 – Discretionary bursary funding calculation

7. Funding and allocations: discretionary bursaries

7.1 Allocations

We make discretionary bursary allocations to institutions that have a 16 to 19 contract or funding agreement each year.

If an institution operates from more than one location across England, or operates through subcontracts, we will make the allocation to the lead office for distribution to each site. You should ensure that students attending provision delivered by subcontractors or at different sites can apply for the 16 to 19 Bursary Fund. The lead institution is responsible for ensuring the bursary fund is administered appropriately at each site and at any subcontractor to ensure students can access support.

The methodology for calculating discretionary bursary allocations has 2 elements:

- element 1: financial disadvantage
- element 2: a) student costs to support travel and b) industry placements

Both elements are based on analysis of 2021 to 2022 academic year full year data, to gauge which students help inform an institution's 2023 to 2024 academic year discretionary bursary allocation.

The underlying requirement that institutions make awards based upon students' financial needs to participate has not changed. However, to be clear, institutions' local bursary policies do not need to be split into these two elements, nor do they need to be referred to. These elements form part of the allocations methodology only. There is no ring fence between the elements and institutions can use the different elements flexibly to support students' needs up to their full allocation.

Element 1, disadvantage, is calculated based on students' home postcodes, matched against the [Index of Multiple Deprivation \(IMD\) 2019](#). The IMD is a government index that uses statistics on education, crime, health, employment, and income to determine how disadvantaged an area is. Financial disadvantage instance values are assigned to students living in the 27% most deprived areas of the country.

Element 2, student costs, is intended to provide a general indicator of the main costs faced by students:

- element 2a calculates an amount of funding for travel to support non-residential students whose home postcode is in the top 60% most deprived areas (based on IMD 2019). The calculation factors in both the rurality of the student's home postcode and distance between the student's home postcode and the delivery location of their learning
- element 2b considers whether the student's study programme makes them eligible for industry placement funding via capacity and delivery fund (CDF) (element 2bi) and/or T Level delivery (element 2bii). The calculation factors in whether a student's home postcode is in the top 60% most deprived areas (based on IMD 2019). Only institutions approved to deliver industry placements via CDF and institutions approved to deliver T Levels (up to and including wave 4) in the 2023 to 2024 academic year are in scope for this funding

The [explanatory notes](#) that are issued with funding allocations set out the calculation in full.

In a small number of instances, a 'by exception' process will be used. For example, the application of averages may be used where there is no end of year data available. This will be made clear to any institutions affected.

This methodology has only been in place since the 2020 to 2021 academic year and to reflect that transitional arrangements have been applied.

Transitional arrangements will cease in the 2023 to 2024 academic year when the intention is to base allocations on their actual calculated values.