

Stratford-upon-Avon School is a company limited by guarantee, registered in England and Wales under number 7690776, whose registered office is Stratford-upon-Avon School, Alcester Road, Stratford-upon-Avon, Warwickshire CV37 9DH

Policy Title	<b>FINANCIAL ASSISTANCE (year 7 to 13)</b>
Policy Reference	<b>SUAS.F.1203.PRO02</b>

DISCLOSABLE UNDER FREEDOM OF INFORMATION ACT 2000	Yes / No	No
TO BE PUBLISHED ON WEBSITE	Yes / No	Yes

POLICY OWNERSHIP	
Governor Committee:	Resources
Department responsible:	Business
Post-holder: <i>(Title and Name)</i>	Andy Mason (School Business Manager)
LINKED PROCEDURES REF:	F.1203.PROproc01
Responsible Person - Procedures	Finance Manager

POLICY IMPLEMENTATION DATE:	March 2012, this revision November 2019
PLANNED REVIEW INTERVAL:	3 years
PLANNED NEXT REVIEW DATE:	September 2022

*Stratford-upon-Avon School welcomes comments and suggestions from the public and staff about the contents and implementation of this policy. Please email your comment to [policy@stratfordschool.co.uk](mailto:policy@stratfordschool.co.uk).*

**i POLICY OUTLINE**

Stratford-upon-Avon School (SuAS) provides financial support to students under a number of circumstances.

**ii PURPOSE**

The purpose of this policy is to define the obligations and strategic intentions of Stratford-upon-Avon School, the Academy Trust, in ensuring that:

- Compliance with legal and statutory requirements is assured;
- Clear criteria can be seen to be fairly applied;
- An ethical and sustainable context, broadly in line with the ethos of the school, is maintained.

**iii IMPLICATIONS OF POLICY**

Compliance with the requirements laid out in the Department for Education’s Financial Handbook for Academies, and thus with Stratford-upon-Avon School’s Financial Regulations Manual. There are no significant implications for health and safety, risk, or staff training. There may be budget implications.

**iv EQUALITY ANALYSIS**

Every policy, at its inception, will be the subject of an Equality Analysis (EA) completed by the policy writer, which should be circulated to all those being consulted, with the draft policy.

**v CONSULTATION**

Consultation if significant change is required, will be with all staff holding core financial responsibilities, plus the Pupil Premium lead.

**vi PROCEDURE**

Procedure is the method by which the strategic intent of the policy is realised, and is thus an ‘instruction manual’ on how the policy outcome is to be achieved.

Insofar as the procedure to support this policy is necessary, it will be an independent document, for internal use by Academy staff. The procedure reference is shown on the Policy Identification Page. The development or amendment of the procedure is at a tactical / operational level. There is therefore no necessity for active referral to the Governing Body **unless** the policy intent has been altered.

**vii RELATED POLICIES AND PROCEDURES**

- Financial Regulations Manual (procedure)
- Charging and Remissions Policy

**viii DOCUMENT HISTORY**

The policy will be subject to regular review once ratified by the Governing Body. The history of the policy will be recorded using the chart following.

Date	Author /Reviewer	Amendment(s)	Approval/ adoption
March 2012	V Hopkins	Policy creation for academy	March 2012
September 2014	K Cullimore	Minor updates of nomenclature. Policy intent unchanged. Amalgamation with post 16 bursary policy.	7 <sup>th</sup> October 2014
June 2017	V Hopkins	Staff responsibilities. No other changes	July 2017
November 2019	A Mason	Move to 3 year review Amend ref to SBD.	9 <sup>th</sup> December 2019

# Financial Support Policy

## 1 Introduction

- 1.1 The school recognises that education places financial demands on parents and there are some occasions when parents/carers will find it hard to meet these demands. The school would like to support parents/families where possible.
- 1.2 We realise that it is hard for parents/carers to ask for financial support but since the size of the school's support fund is limited, the school will have to apply certain criteria in deciding whether or not support can be given.
- 1.3 This policy applies to students in all years, from year 7 through to year 13.

## 2 Criteria

- 2.1 Consideration will be given to students whose parents/carers fulfil one or more of the following:
  - Experiencing situations which are causing financial difficulty, for example caused by recent job loss, bereavement or other serious and unforeseen circumstances
  - Eligible for Free School Meals currently
  - Have been eligible for Free School Meals during the previous 6 year period (thus linked with Pupil Premium funding).
  - In receipt of benefits
  - Not in receipt of benefits, but still experiencing financial difficulties in general.
- 2.2 Each application will be reviewed on an individual basis and will take into consideration a number of factors, such as any amount already awarded, number of siblings and the amount available in the school's support fund.
- 2.3 Priority will be given to parents/carers who have not already been supported by this policy.
- 2.4 Criteria are subject to change, linked to the government's benefit policy, and parents are reminded that the school website will carry the most up to date information on the criteria.

## 3 Qualifying Resources

- 3.1 Application for financial support will be considered for:
  - Obligatory items of school uniform including P.E. Kit
  - Costs of educational visits that are integral to the curriculum
  - Educational equipment e.g. text books
  - Transport

## 4 Making an Application

- 4.1 Applications are normally made using the Financial Assistance application form on the next page. This can be completed by the parent/carer or a member of staff in their place. Evidence should be provided to support the eligibility criteria. Forms and attachments should be submitted in a sealed envelope, marked confidential, to:

Year 7 to 11: Business Manager.  
Year 12 to 13: Post 16 Development Coordinator

- 4.2 All information provided on this form will be kept in the strictest confidence.

## Request for Financial Assistance – Year 7 to 13

All applications are treated in the strictest confidence, and are subject to excellent student attendance and behaviour.

All applications for bursary funds must be accompanied by supporting evidence.

Name of Student:					
Year:					
Address:					
<b>Bursaries are means tested and therefore household income is one of the criteria that we use to assess applications.</b>					
<b>Please tick one of the following to show what evidence you have provided. If you do not provide evidence we will be unable to process your application.</b>					
P60	<input type="checkbox"/>	Income Support/Universal credit(award letter)	<input type="checkbox"/>	Full tax credit award notice	<input type="checkbox"/>
Other benefits/pension ( award letter)	<input type="checkbox"/>	Self-employed earnings ( tax return)	<input type="checkbox"/>	2 Most recent wage slips	<input type="checkbox"/>
Number of dependent children in the household:					<input type="text"/>
<b>Assistance requested:</b>	<b>Detail:</b>			<b>Amount ( with receipt)</b>	
Travel					
Equipment/books					
Curriculum Trip					
Clothing					
Other (please specify)					
Please provide us with any other information you may feel is relevant to your application for a bursary.					

## DECLARATION

**Public funding is provided to the School for the education of young people and as such it has a moral and statutory obligation of careful stewardship of these funds.**

In signing the declaration, the student and the parent / guardian agrees to all the conditions and eligibility criteria of the Financial Assistance Bursary as outlined in the Financial Assistance policy:

- I declare that the information provided in this application is correct and complete to the best of my knowledge and belief.
- I understand that giving false or incomplete information or not telling the school about any part of our income that is relevant, may jeopardise any current and future applications. Payments may be stopped and the school may seek repayment of any overpayment made. The matter may also be referred to the Department for Education or the police for further action, as appropriate.
- I undertake to advise the Business Manager / Post 16 Development Coordinator of any change in the family financial circumstances that are relevant to this application as it may affect any future applications.
- I understand that I am eligible for financial assistance only if I am a current student at Stratford upon Avon School.
- I understand the application is subject to school attendance and behaviour standards and I am fully aware of what the expectations are. Failure to comply with this may cause any bursary to be withdrawn.

SIGNATURE OF  
STUDENT \_\_\_\_\_ Date: \_\_\_\_\_

SIGNATURE OF  
PARENT/GUARDIAN \_\_\_\_\_ Date: \_\_\_\_\_

Office Use Only:

Authorisation if application meets criteria:

Business Manager (Year 7 to 11)

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

OR

Post 16 Development Coordinator (Year 12 to 13)

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Further Authorisation if required:

Strategic Business Director / SLT

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## **5 Notification**

- 5.1 If financial assistance is agreed, the parent/carer will be notified in writing by Business Manager/ Post 16 Development Coordinator, as appropriate.

## **6 Appeal process**

- 6.1 Administration and allocation of financial assistance is subject to our normal governance and audit regimes, in line with the school's funding agreement with the Department for Education. If anyone feels aggrieved about how their request has been handled, they should follow the normal complaints procedure within the school.

## **7 Subsequent requests for financial assistance**

- 7.1 If financial assistance is provided, there may not be a requirement to complete another application form for further qualifying resources in the same academic year. In this instance, all that would be needed is a request in writing to the Business Manager / Post 16 Development Coordinator, who will determine if any further clarifying information is required.