

16 to 19 Bursary Fund: examples of good practice

Appendix 2 – Example form 2

Bursary Fund Application Form 2013/14

Please complete the form and bring it together with your supporting evidence and the Autumn 1 claim form. The other forms should be submitted by the dates printed on the forms

Title		Surname		First Name	
Address					
				Postcode	
Phone/Mobile		Email			
Date of Birth (DD/MM/YY)		Your Age	You must be 16, 17 or 18 (i.e. under 19) on 31 st August 2013 to apply.		
Have you the right of abode and been resident in the UK for the last 3 years?				Yes	No

Bursary Criteria

To qualify you must be aged 16 or over and under 19 on 31 August 2013 and meet the EFA's residency criteria. The bursary is paid to enable you to attend training with us and will only be paid if your attendance and behaviour meet the required standard.

Discretionary Bursary Criteria

Your household income is one of the criteria which will help us to assess your application. If your household income exceeds £25,000 per annum, you will not be eligible for a bursary payment.

Please tick one of the following to show what type of evidence you have provided. **If you cannot provide evidence then we cannot process your application for bursary payments.**

P60	Income Support / Universal Credit (award letter)	Full Tax Credit Award Notice
Self-employed earnings (official tax return)	Other benefits/pension (award letter)	Wage slips (most recent wage slip)
Number of dependent children in the household		

Vulnerable Bursary Criteria

To qualify you must fall into one of the categories below and produce the required evidence as stated.

Are you in receipt of Income Support or Universal Credit? (evidence required - Income Support or Universal Credit Statement letter)	Yes	No
Care Leaver or currently looked after in care? (evidence required - letter from Local Authority)	Yes	No
Disabled student in receipt of <u>both</u> Employment Support Allowance and Disability Living Allowance/Personal Independence Payments (evidence required financial statement showing <u>both</u> ESA and DLA/PIP)	Yes	No

STUDENT REQUEST FOR ASSISTANCE FORM

The amount of financial assistance you will receive is dependent on your personal circumstances. It is intended to help you with the costs of overcoming any barriers you may have when attending learning. Using the table below, please tell us what you might need financial assistance for and how much you believe you will need during the academic term. The claim forms attached at the back of this pack are to be submitted ½ termly by the dates stated.

This information is strictly confidential and will only be used for this assessment purpose.

	Amount Required	Number of days
<p>Assistance Requested – please provide details</p> <p>Travel</p> <p>Meals</p> <p>Appropriate clothing to suit training and placement requirements</p> <p>Equipment</p> <p>Any other</p>		

If there are extenuating circumstances within your household that have not been covered but you would like us to consider as part of this application, please provide the information here:

LEARNER DECLARATION

- I declare that the information on this form is true and accurate to the best of my knowledge.
I have made this claim for a Bursary payment, fully aware that any false statements can lead to withdrawal/refusal of any financial support and may lead to me being prosecuted.
- I understand that if I refuse to provide information which may be relevant to my claim, the application will not be accepted.
- I understand that monies I receive under the Bursary Scheme will be paid on condition of standards of attendance and behaviour, as explained in the Bursary Fund – Information for Learners.
- **HOLIDAYS WILL BE UNPAID.**
- **The bank account details provided must be in the name of the student.**
- I will attend regularly and complete the course for which my bursary is supporting me.
- When changes to my household financial circumstances occur (which may result in changes to my claim), I confirm will notify my provider immediately.
- I will notify my provider immediately with any changes to my Bank/Building Society details.
- I understand that monies I receive under the Bursary Scheme have been awarded to provide me with financial support to allow me to continue in learning, and if I leave learning all financial support will stop.
- I understand that I do not have an automatic entitlement to Bursary payments, and all payments are based on the information I have provided.
- I am clear that the Bursary payments I receive are to provide me with the means to remain in learning and are to be used for items such as: books, equipment, travel costs, meals, additional costs, i.e. trips, miscellaneous course costs.
- I understand I have the right to appeal if I disagree with the outcome of my Bursary Application. This appeal should be made to my provider, but if I feel I have not been treated fairly, I can follow the Complaints Procedure.
- I understand that this application process will be repeated for each year of study.

I confirm I have read the information provided and I agree to the conditions of this application.

Applicant Signature

Date

Parent/Carer or

Key Worker Signature

Date

Officer Comments:

FOR OFFICE USE ONLY

Student Name: _____

Eligibility – please tick appropriate box

Vulnerable Bursary		<ul style="list-style-type: none"> • Those young people who receive income support/universal credit • Care Leavers or young people who are looked after children • Disabled young people in receipt of both Employment Support Allowance and Disability Living Allowance/PIP
Discretionary Bursary		<ul style="list-style-type: none"> • Young people facing financial barriers to participation in further education. Agreed standards of behaviour and attendance should be met.
Both		<ul style="list-style-type: none"> • Young people who qualify for the Vulnerable Bursary but who require extra assistance with the costs of participating in learning.

Details of Assistance Requested	Assistance Granted ✓	Criteria Evidenced ✓	Receipts Attached ✓	Amount Granted £
Travel				
Meals				
Appropriate clothing to suit training and placement requirements				
Equipment				
Any other				
NOTE - Must fall within guide amounts				

Staff Name: _____

Staff Position: _____

Date Received _____ **Date Approved** _____

BURSARIES PROTOCOL

(Name of Academy) will administer the Bursary Fund awarded within the Education Funding Agency's 16-19 Bursary Fund Guidelines. We aim to have clear and transparent processes including an appeals procedure.

All recording along with evidence of eligibility will in addition follow (name of Academy) procedures/guidelines

Two types of bursary will be available to young people aged 16-19 who commence their training in the year 2013/14:

- Discretionary Bursary
This may be awarded on an identified needs basis and at (Name of Academy) discretion to cover costs such as books/equipment, transport, meals, accommodation, exam re-sits fees and other miscellaneous items associated with being in learning and will meet the following assessment criteria:
 - Applicants must be under 19 on 31 August 2013
 - Evidence of household income below £25,000 must accompany the application prior to assessment. As each application is individually assessed, there may be some flexibility, e.g., consideration would be given to the number of dependents in a household.
 - Based on the information received and if financial hardship is identified, the learner will be provided/reimbursed with:
 - Contribution toward meal expenditure in the school canteen
 - Re-imburement of travel costs upon submission of evidence. e.g. travel tickets/weekly pass
 - Other as mentioned above
- Vulnerable Bursary
This category includes young people in care, care leavers, young people in receipt of Income Support/Universal Credit and Disabled young people in receipt of both Disability Living Allowance/Personal Independence Payments and Employment Support Allowance who will be eligible to receive a bursary of £1,200 per year or pro-rata in the case of short courses. Evidence to support the application will be needed, such as a letter setting out the benefit to which the young person is entitled, or written confirmation of current/previous 'Looked After' status from the relevant Local Authority, or their Leaving Care Review Document.
- In addition, if other barriers are identified, learners assessed as being eligible for the discretionary element can also request financial assistance. This could be for clothing, equipment etc.

In both cases, the young person will complete an application form and will provide the required evidence as listed above. The application will be processed (upon receipt of the required evidence). If the application is unsuccessful, the young person will be made aware of the outcome in writing.

Receipt of the bursary will be conditional on the young person meeting agreed standards of attendance and behaviour, as outlined in the Learning Agreement, which also details clearly any sanctions which may be applied.

(Name of Academy) Complaints Procedure is in place to cover:

- Queries/disagreements over applications for both the Vulnerable and Discretionary Bursary funds.
- Queries/disagreements over agreed standards of attendance and behaviour.

Student Name:

Autumn 1- 1/2 Term Claim Form

Eligibility – please tick appropriate box

Discretionary Bursary		<ul style="list-style-type: none"> • Young people facing financial barriers to participation in further education. Agreed standards of behaviour and attendance should be met.
Vulnerable Bursary		<ul style="list-style-type: none"> • Those young people who receive income support/universal credit • Care Leavers or young people who are looked after children • Disabled young people in receipt of both Employment Support Allowance and Disability Living Allowance/PIP
Both		<ul style="list-style-type: none"> • Young people who qualify for the Vulnerable Bursary but who require extra assistance with the costs of participating in learning.

Details of Assistance Requested	Assistance Granted ✓	Criteria Evidenced ✓	Receipts Attached ✓	Amount Granted £
Travel				
Meals				
Appropriate clothing to suit training and placement requirements				
Equipment				
Any other				
NOTE - Must fall within guide amounts				

Account Name

Account Number Sort Code

OFFICE USE ONLY

Staff Name: _____

Staff Position: _____

Date Received _____ **Date Approved** _____

Autumn 2 - ½ Term Claim Form

Submit by

Name of Student:

Eligibility – please tick appropriate box

Discretionary Bursary		<ul style="list-style-type: none"> • Young people facing financial barriers to participation in further education. Agreed standards of behaviour and attendance should be met.
Vulnerable Bursary		<ul style="list-style-type: none"> • Those young people who receive income support/universal credit • Care Leavers or young people who are looked after children • Disabled young people in receipt of both Employment Support Allowance and Disability Living Allowance/PIP
Both		<ul style="list-style-type: none"> • Young people who qualify for the Vulnerable Bursary but who require extra assistance with the costs of participating in learning.

Details of Assistance Requested	Assistance Granted ✓	Criteria Evidenced ✓	Receipts Attached ✓	Amount Granted £
Travel				
Meals				
Appropriate clothing to suit training and placement requirements				
Equipment				
Any other				
NOTE - Must fall within guide amounts				

Account Name

Account Number Sort Code

OFFICE USE ONLY

Staff Name: _____

Staff Position: _____

Date Received _____ **Date Approved** _____

Spring 1 - 1/2 Term Claim Form

Submit by

Name of Student:

Eligibility – please tick appropriate box

Discretionary Bursary		<ul style="list-style-type: none"> • Young people facing financial barriers to participation in further education. Agreed standards of behaviour and attendance should be met.
Vulnerable Bursary		<ul style="list-style-type: none"> • Those young people who receive income support/universal credit • Care Leavers or young people who are looked after children • Disabled young people in receipt of both Employment Support Allowance and Disability Living Allowance/PIP
Both		<ul style="list-style-type: none"> • Young people who qualify for the Vulnerable Bursary but who require extra assistance with the costs of participating in learning.

Details of Assistance Requested	Assistance Granted ✓	Criteria Evidenced ✓	Receipts Attached ✓	Amount Granted £
Travel				
Meals				
Appropriate clothing to suit training and placement requirements				
Equipment				
Any other				
NOTE - Must fall within guide amounts				

Account Name

Account Number

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Sort Code

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OFFICE USE ONLY

Staff Name:

Staff Position:

Date Received

Date Approved

Spring 2 - 1/2 Term Claim Form

Submit by

Name of Student:

Eligibility – please tick appropriate box

Discretionary Bursary		<ul style="list-style-type: none"> • Young people facing financial barriers to participation in further education. Agreed standards of behaviour and attendance should be met.
Vulnerable Bursary		<ul style="list-style-type: none"> • Those young people who receive income support/universal credit • Care Leavers or young people who are looked after children • Disabled young people in receipt of both Employment Support Allowance and Disability Living Allowance/PIP
Both		<ul style="list-style-type: none"> • Young people who qualify for the Vulnerable Bursary but who require extra assistance with the costs of participating in learning.

Details of Assistance Requested	Assistance Granted ✓	Criteria Evidenced ✓	Receipts Attached ✓	Amount Granted £
Travel				
Meals				
Appropriate clothing to suit training and placement requirements				
Equipment				
Any other				
NOTE - Must fall within guide amounts				

Account Name

Account Number

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Sort Code

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OFFICE USE ONLY

Staff Name:

Staff Position:

Date Received

Date Approved

Summer 1- ½ Term Claim Form

Submit by

Name of Student:

Eligibility – please tick appropriate box

Discretionary Bursary		<ul style="list-style-type: none"> • Young people facing financial barriers to participation in further education. Agreed standards of behaviour and attendance should be met.
Vulnerable Bursary		<ul style="list-style-type: none"> • Those young people who receive income support/universal credit • Care Leavers or young people who are looked after children • Disabled young people in receipt of both Employment Support Allowance and Disability Living Allowance/PIP
Both		<ul style="list-style-type: none"> • Young people who qualify for the Vulnerable Bursary but who require extra assistance with the costs of participating in learning.

Details of Assistance Requested	Assistance Granted ✓	Criteria Evidenced ✓	Receipts Attached ✓	Amount Granted £
Travel				
Meals				
Appropriate clothing to suit training and placement requirements				
Equipment				
Any other				
NOTE - Must fall within guide amounts				

Account Name

Account Number

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Sort Code

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OFFICE USE ONLY

Staff Name:

Staff Position:

Date Received

Date Approved
