



Cabot  
Learning  
Federation



CABOT  
LEARNING  
FEDERATION

# CLF POST 16 BURSARY POLICY

Implementation Date:  
June 2016

Next Review Date:  
June 2019

## History of Policy Changes

Date	Page	Change	Reason for Change	Changes made by
June 2016	Whole Document	Adoption by the Cabot Learning Federation Post 16		
June 2017	Whole Document	Review of Policy Standardise policy document layout	Review and update	
July 2018	Whole document	Reviewed and updated in line with new legislative guidance from the government. Dates amended to 2018/2019.	Review due, and new guidance provided by the government.	Kath Cooper, Rachel Morse
December 2018	Whole document			Approved by Academy Council

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**The Bursary Fund is an allocated allowance for disadvantaged students identified by Department for Education criteria. Students will be supported financially to remove economic barriers to the learner.**

**It is not a compulsory fund and money will therefore be awarded on a discretionary basis using the Cabot Learning Federation Post 16 criteria.**

## **1. Learner Eligibility**

- A learner aged under 19 on 31 August in the academic year in which he/she starts the programme of study funded by the Education Funding Agency, will be eligible to apply for a bursary.
- Eligibility and the level of award is dependent upon the learner's personal circumstances / level of household income.
- The budget funding for bursaries is limited; learners who are eligible for support are not automatically entitled to discretionary bursaries.

## **2. Types of Bursaries**

### **Guaranteed bursaries (Stage 1)**

- Children in care
- Care leavers (restrictions apply, please refer to [www.gov.uk/guidance/16-to-19-bursary-fund-guide-2018-to-2019-academic-year](http://www.gov.uk/guidance/16-to-19-bursary-fund-guide-2018-to-2019-academic-year))
- Students in receipt of Universal Credit (or Income Support) because they are financially supporting themselves and someone who is living with them such as a child or partner
- Students in receipt of Disability Living Allowance or Personal Independence Payments in their own right as well as Employment and Support Allowance or Universal Credit in their own right

### **Non-discretionary bursaries (Stages 2 – 4)**

- CLF Post 16 will seek to allocate to non-discretionary bursaries to learners who are at risk of not participating in learning because of financial hardship

Money will be used to fully meet the guaranteed awards for students in priority group 1 followed by awards for students in priority groups 2, 3 and 4, where this is achievable within the budget, before any money is allocated to students in priority groups 5 and 6.

### **Additional Bursary Support – Personal Individual Claims**

Where money is available to make awards to priority group 5, then these will be at the discretion of the Principal of the CLF Post 16 with consideration being given to all information provided relating to household income, personal circumstances and other sources of funding.

### 3. Criteria for the allocation of bursary funding

Non-Discretionary		
Priority	Criteria	Indicative Bursary
1	<ul style="list-style-type: none"> <li>Young people aged 16 and 17 in care</li> <li>Care leavers</li> <li>Universal Credit (or Income Support) because they are financially supporting themselves and someone who is living with them such as a child or partner</li> <li>Students in receipt of Disability Living Allowance or Personal Independence Payments in their own right as well as Employment and Support Allowance or Universal Credit in their own right</li> </ul>	£1,200 per annum, payable in 10 monthly instalments
Discretionary		
Priority	Criteria	Indicative Bursary
2	Students who are unable to access any other form of learner support funding and parental income including child tax credit and working tax credit is below £16,190 p.a.	<b>Y12</b> - £880 per annum, payable in 11 monthly instalments (Sept – July) <b>Y13</b> - £800 per annum, payable in 10 monthly instalments (Sept – June)
3	Students who are unable to access other forms of learner support funding and either parent/carer is in receipt of: <ul style="list-style-type: none"> <li>Income Support</li> <li>Income-based Jobseekers Allowance</li> <li>Income-related Employment and Support Allowance</li> <li>Incapacity benefit</li> <li>Support under Part VI of the Immigration and Asylum Act 1999</li> <li>The Guarantee element of State Pension Credit</li> </ul>	<b>Y12</b> - £880 per annum, payable in 11 monthly instalments (Sept – July) <b>Y13</b> - £800 per annum, payable in 10 monthly instalments (Sept – June)
4	Students who are unable to access any other form of learner support funding and parental income including child tax credit and working tax credit is between £16,190 and £25,000 p.a	<b>Y12</b> - £440 per annum, payable in 11 monthly instalments (Sept – July) <b>Y13</b> - £400 per annum, payable in 10 monthly instalments (Sept – June)
5	This funding is available for students on an individual discretionary basis who may require financial support during their period of study with CLF Post 16.	Between 25% and 100% of any additional costs incurred. Payments will be approved by a panel to determine the level of support available.
<b>Discretionary bursary is never a guaranteed payment. Whole or part payment may be withheld if standards in this regard are not met.</b>		

#### 4. How to apply

Student applications should be submitted within term 1 of each academic year.

- Complete a Bursary Application form – **Bank account must be in the student's name.**
- Applications must be supported by evidence of circumstances.
- Parents and students are encouraged to make early application in September, but they can apply for a bursary at any time during the academic year
- If a student feels aggrieved about how their application for a bursary was handled, they should follow the CLF Post 16 complaints procedure, and put their complaint in writing to the Principal of CLF Post 16.

#### 5. Bursary awards payment criteria

- Payments made to teaching academies or departments to cover particular course costs (e.g. examination resit fees, sports kit)
- Purchase of essential equipment on loan to the student for the duration of the course (e.g. text books, which should be returned at the end of study)
- Travel costs may be considered upon application, such as a contribution towards bus/train fares and fuel. Fuel will not be paid as mileage, receipts must be provided for consideration.
- One off payments/costs will be considered but only as a contribution of between 25% - 75% of the total cost. Students will need to be prepared to pay for or contribute towards the cost of these items before they are purchased.
- To contribute to and support additional costs related to study programmes (e.g. towards the cost of excursions, materials, visits to University Open Days). Students will be required to provide receipts and complete a Bursary additional claim form. Reimbursement will be proportional, not in full. Large resource items or costs (over £100) will not be considered (i.e. laptops, hotels, musical instruments)
- Attendance is monitored regularly. In order to avoid any freeze on payments, students are expected to attend 90% or higher of their timetable. Lower attendance will jeopardise payments.
- Satisfactory attendance is understood as meaning that no absence is unauthorised. A warning will be given and then a payment withheld in the event of unauthorised absence.
- If a student is absent for a five day period through illness or for other authorised reasons then payment will not be made for that period.

**Discretionary bursary is never a guaranteed payment. All applications are considered and approved by a panel. Payment of all awards will be dependent upon satisfactory behaviour and attitudes as specified in the student agreement. Whole or part payment may be withheld if standards in this regard are not met.**

#### 6. Evidence required

**Whatever you have declared must be backed up by evidence (photocopies accepted) in order for an assessment to be made. No action will be taken until full, satisfactory evidence has been provided.**

The table below shows the evidence you will need to provide with your application form. Once you have declared and identified your benefits on the application find the ‘Type of Income’ that applies to you in the first column and the ‘Evidence Required’ column will tell you what you need to provide.

All evidence must be current and a complete and full copy (all pages).

<b>Type of Income</b>	<b>Evidence Required</b>	<b>Check</b>
<b>Annual Salary</b>	P60 for the previous tax year, or week 52 (last week in March) pay slip or month 12 (March) pay slip	
<b>Child Tax Credit</b>	<b>CURRENT</b> Working Tax Credit Award Notice. Must be for full year and not partial awards (FULL AWARD NOTICE)	
<b>Working Tax Credit</b>	<b>CURRENT</b> Working Tax Credit Award Notice. Must be for full year and not partial awards (FULL AWARD NOTICE)	
<b>Universal Credit</b>	Entitlement / Award letter – dated within the last 3 months	
<b>Income Support</b>	Entitlement / Award letter – dated within the last 3 months	
<b>Job Seekers Allowance</b>	Entitlement / Award letter – dated within the last 3 months	
<b>Employment Support Allowance</b>	Entitlement / Award letter – dated within the last 3 months	
<b>Incapacity Benefit</b>	Entitlement / Award letter – dated within the last 3 months	
<b>Carer’s Allowance</b>	Entitlement / Award letter – dated within the last 3 months	
<b>Council Tax Benefit</b>	Entitlement / Award letter – dated within the last 3 months	
<b>Any other benefit</b>	Entitlement / Award letter – dated within the last 3 months	
<b>Grants or bursaries etc.</b>	Relevant paperwork detailing entitlement and amount paid	
<b>Disability Living Allowance</b>	Entitlement / Award letter – dated within the last 3 months	
<b>Any other income</b>	Relevant paperwork	
<b>Free School Meals</b>	Confirmation letter	

**The easiest way to tell us about your income is to send your latest Tax Credit Award Notice (form TC602) that correctly states your total household income for the tax year.** Do not send us your Review Notice (form TC602R) or a Tax Credit Award Notice that does not state your correct income for the tax year.

A Tax Credit Award Notice is sent to you if you receive working tax credit or child tax credit.

The figure you need to give us is your **total income** shown on the inside pages of your notice – not the amount of tax credits you receive.

## Form 1 - Bursary Claim Form for Academic Year 2018/19

Learner Details (Part A) - to be completed by the learner in BLOCK CAPITALS			
Surname/Family Name			
First Name(s)			
Date of Birth			
Age on 31/08/2018	Years	Months	
Address			
Town/City			
County			
Postcode			
1. Do you live separately from adults who take care of you?	Yes	No	
2. Are you in Local Authority care, a care leaver or living with foster parents?	Yes	No	
3. Are you personally currently receiving Universal Credit (or Income Support) in your own name?	Yes	No	
4. Are you a disabled young person in receipt of Employment Support Allowance or Disability Living Allowance (or Personal Independence Payments)	Yes	No	
5. Are you a parent yourself who is mainly responsible for at least one child?	Yes	No	
6. Were you in receipt of Bursary payments in the 2017/2018 academic year?	Yes	No	
7. If you answered 'Yes' to question 6, what was the monthly amount of your Bursary?			£
Learner Bank or Building Society details			
<i><b>You must enclose an account statement, letter or form from your bank or building society that shows your name, sort code, account number, roll number (if applicable) and home address.</b></i>			
Full name of Account Holder			
<i>This should be the name as it appears on your cash or debit card or statement</i>			
Name of Bank/Building Society			
Branch Address			
Sort Code			
Account Number			
<i>Your account number may not be the same as your cash/debit card number; you can find it on a bank or building society statement. <b>Most account numbers are 8 digits long.</b> If you are unsure, your bank or building society can advise you.</i>			
Roll Number (if applicable)			
<i>If you have given details of a building society account, enter the roll or reference number (if applicable). Enter this <b>exactly</b> as it appears on your statement and include any hyphens (-) or slashes (/) that are shown as part of the number</i>			
Income Details (Part B) – To be completed by the parent/carer(s) with whom the student normally lives except when the student is living independently			

<p>If the student answered YES to question 1,2,3 or 4 overleaf and so is in the priority 1 group then tick this box and you may progress straight to <b>Part C</b> without declaring any financial information.</p> <p><b>You must still provide documents to evidence that you are eligible (see the Bursary Procedure for details of acceptable documents)</b></p>						
<p>If you have confirmation that the student has been awarded Free School Meals for 2017/18 please tick this box.</p>						
<p><b>Your total income (for any parent/carers normally resident with the student)</b></p>						
Pre-tax Earned Income	£	Working Tax Credit	£	Child Tax Credit	£	
	a year		a year		a year	
<p><b>Please enclose a photocopy of your latest Tax Credit Award Notice (form TC602). This should be a <u>full and complete copy</u> showing the amount of earned income, working tax credit and child tax credit for 2018/19 and showing total income for 2017/18. If you are not in receipt of tax credits please enclose P60 or if self-employed SA302. <b>The application cannot be processed without proof of income.</b></b></p>						
<p><b>Tell us about any benefits you receive</b></p>						
	Name			Relationship to young person		
Adult 1						
Adult 2						
<p><b>Please enter the annual amount for each adult against the benefit listed below</b></p>						
<b>Benefit</b>	<b>Adult 1</b>		<b>Adult 2</b>			
Income Support						
Incapacity benefit						
Income-based Jobseekers Allowance						
Income-related Employment and Support Allowance						
Support under Part VI of the Immigration & Asylum Act						
Guarantee element of State Pension Credit						
<p><b>If you have entered details in section B4 you should enclose a photocopy of your letter showing entitlement and amount of benefit received.</b></p> <p><b>Your application cannot be processed without proof of benefit.</b></p>						



**Privacy Notice and Declaration (Part C)**

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 16 -19 Bursary scheme.

In signing this form you are agreeing that you have understood the Privacy notice and the conditions laid out in the Bursary Funding Statement and you are making a declaration that the information given on the form is correct and complete to the best of your knowledge and belief.

<b>Signed</b>	(student)	<b>Date</b>	
<b>Signed</b>	(parent/carer)	<b>Date</b>	

Please return to the Student Support Leader at your Home Academy.

**OFFICE USE ONLY**

Date Received	Date Processed	Signed

Bursary agreed:	Yes	No	Amount Agreed: £				
Priority:	1	2	3	4	5	6	UPN:
SIMs updated:	Added to payment spreadsheet						

**Panel decision if required**

Outcome of panel meeting:

Date:

## Bursary Claim Form for Academic Year 2018/19

### Personal Individual Claims

#### **WHO CAN CLAIM?**

This funding is available for students on an individual discretionary basis who may require financial support during their period of study with CLF Post 16.

#### **WHAT SUPPORT IS AVAILABLE?**

Support is available to assist with additional costs relating specifically to the course/s a student is following. This funding is in addition to that already being claimed.

Funding will be made available for items such as:

- Specialist equipment (e.g. cameras, art materials )
- Course trips
- Visits to universities (where individual is funding)
- Essential transport costs
- Students outside the catchment area of the free CLF Post 16 link bus can apply to be considered for support towards independent travel costs.

#### **HOW MUCH WILL BE AVAILABLE?**

The claims will be looked at on an individual basis, however if the cost of an individual claim is in excess of £50 then the student may be expected to pay a proportion of the total cost. The proportion will be decided by a panel, which will meet half-termly to look into the evidence provided for the claim.

#### **HOW TO APPLY?**

Complete the attached application form, clearly indicating the item being claimed for and the related course. This must be signed and dated by the member of staff teaching the course. For items such as university visits that are not directly linked to a specific course, this form should be signed by the Head of Post 16.

All claims will need to have attached the **original** receipt or ticket, which shows the cost incurred.

Completed claim forms will be passed to the Head of Post 16 to authorise before being forwarded to the finance team to process.

Payments will be paid directly into individual student's bank account using the details supplied with initial bursary claim.

**PLEASE NOTE: There are limited funds available for this bursary support and it will be allocated on a discretionary basis.**

In order for us to process any Isolated Need Bursary claims parents/carers will be required to provide the following evidence:

A letter from parents/carers identifying the need (e.g. isolated cases of extreme cost)

Evidence that family income is less than £36,000 (not needed if already provided for ongoing bursary claim)

Tax credit form TC602 or

Evidence from self-employment or

A recent P60 or 3-6 months' worth of Bank statements

**APPLICATION FORM - Additional Post 16 Bursary Support (Personal Individual Claims)****TOP SECTION TO BE COMPLETED BY STUDENT (BLOCK CAPITALS)**

Student Surname:.....

Student Forename(s):.....

Date of birth ..... / ..... / ..... {e.g. 06/01/2000}

Home Academy: ..... Tutor Group:.....

Please describe the item you are claiming for: {e.g. paints, train ticket, other transport}

Have you attached the receipt/ticket showing the claim cost?  Tick if attached

Cost of Claim: £.....

Related Course: .....

Staff in charge of course: .....  
(Head of Post 16 if not course specific)**I agree that the above student requires the item claimed for to directly support the course they are studying or that their personal need has been identified and meets CLF Post 16 criteria for funding support.**

Signature of Staff:..... Date: .....

**Decision of Panel:**Form Completed:  tick Amount of claim: £ .....

Decision of Panel:

Approved for payment Yes No

SLT Signature:..... Date: .....

Notes:

Payments will be paid directly into individual student's bank account using the details supplied below:

Learner Bank or Building Society details	
<b>Full name of Account Holder</b>	
<i>This should be the name as it appears on your cash or debit card or statement</i>	
<b>Name of Bank/Building Society</b>	
<b>Branch</b>	
<b>Sort Code</b>	
<b>Account Number</b>	
<i>Your account number may not be the same as your cash/debit card number; you can find it on a bank or building society statement. Most account numbers are 8 digits long. If you are unsure, your bank or building society can advise you.</i>	
<b>Roll Number (if applicable)</b>	
<i>If you have given details of a building society account, enter the roll or reference number (if applicable). Enter this exactly as it appears on your statement and include any hyphens (-) or slashes (/) that are shown as part of the number</i>	
<b><i>You must enclose an account statement, letter or form from your bank or building society that shows your name, sort code, account number, roll number (if applicable) and home address.</i></b>	