

## Introduction

### 16-19 Bursary 2019-2020 Procedures and Guidance

The Trinity Sixth Form Academy Bursary Scheme exists to enable students who have been identified as experiencing the greatest need for financial support to remain in education and thereby improve their choices in life.

We recognise that post-16 education brings with it a financial burden for parents/carers and that, for this reason, we are likely to receive many more applications than we can approve. We are committed to assessing all applications received in a fair, consistent and objective manner.

We cannot know, until the application deadline, how many students are in each financial category, we will initially work with three categories. The thresholds for each category may be adjusted due to higher or lower than expected numbers of applications in each category and consequently monetary payments may increase or decrease mid-term to adjust to the numbers accepted onto the bursary. All students\* aged 16 to 19 with at least 12 guided learning hours or more are eligible to apply for an Trinity Sixth Form Academy Bursary but will need to indicate the category their application falls within.

#### Eligibility and Criteria

To be eligible, students must satisfy the residency criterion. This means having a British or Northern Ireland passport, or

- having your passport endorsed to show you have the right of abode in the UK.
- having 'settled status' in the UK.

\*Students must be aged **under 19 years** on 31 August in the academic year in which they start the course.

Students that are aged 19 or over at 31 August 2019 **and** have an Education, Health and Care Plan (EHCP).

Students that are aged 19 or over at 31 August 2019 **and** continuing on a study programme they began aged 16 to 18 ('19+ continuers').

Category A	<p>Students who are Looked After Children (in care), care leavers or on a special Guardianship Order, those who are on Income Support or Universal Credit(UC) Payment in their own name, and those registered as disabled and in receipt of Employment Support Allowance or UC <b>and</b> Disability Living Allowance/Personal Independence Payment.</p> <p>Students in this category will be entitled to a bursary payment, in cash or goods (determined by the academy) amounting up to £1,200 per year. Category A has been determined externally (by central government) and the Bursary is therefore guaranteed for students in this category subject to them requiring financial assistance.</p>
Category B	<p>Students from households with a gross annual income (inclusive of any benefits/tax credits) of less than <b>£25,000</b> are likely to be awarded a bursary, but students from households where the gross annual income is up to <b>around this figure</b> are welcome to apply. Students who fall near the threshold are advised to apply as we constantly review the bursary. We require as evidence your <b>FULL</b> up to date letter from DWP and P60 confirming annual income and allocation of tax credits.</p> <p>We require a copy of your latest Council Tax Bill and Housing Benefits/Universal Credit statement (if appropriate).</p>
Category C	<p>Students who may or may not be in the above categories but who are experiencing significant financial hardship due to current/changed circumstances or with an exceptional situation.</p> <p>Note: Students making a category C application must complete the 'Additional Information' (Section 5) section and provide evidence of household income.</p>

## **APPLICATION FORMS**

- Available from 6<sup>th</sup> Form Reception or the Personal Progress Tutors office.

We cannot accept on-line applications. Applications must be submitted in paper form and must be accompanied by **FULL** supplementary evidence copies, as requested.

### **Incomplete Applications**

Please ensure that your completed application form is submitted with **ALL SUPPORTING EVIDENCE** we have requested. We cannot process your application without the evidence required and this will almost certainly lead to delays in payments or missing closing deadlines.

## Deadline for receipt of applications

# First Deadline for Applications: 13 September 2019

Application forms received later than 13 September WILL be considered for inclusion in a later Bursary intake\* Application for the Bursary never closes, we will always look at new applications.

Your Council Tax Bill and Housing Benefits/Universal Credit statement (where relevant) must be submitted with your application form.

## Bursary Payments

If you are granted a monthly payment from the Bursary Fund, payments will begin as soon as we have processed your application and no later than week beginning Monday 30 September for successful applications made by the deadline. Monthly payments are dependent upon attendance of 90%. Bursary payments will be made by BACS on Mondays. You will receive email notification if you are to miss a payment. The Academy can also stop Bursary payments if you do not adhere to the conditions of your Learning Agreement with regard to progress, attitude or behaviour. All decisions in respect to how a bursary is delivered to a student is completely at the academy's discretion and can be changed at any time.

## Reasons why Bursary payments may be withheld

Bursary payments are dependent upon **full attendance** to The Academy and **adherence to the conditions laid out in the Home-Academy Agreement** especially in relation to behaviour, attitude and punctuality. Please note all absences must be authorised on the day of absence by parents/carers. **No backdated payments will be made for late notification of absence.**

## Appeals

If you believe that the decision regarding your Bursary application is incorrect, you should put in a Letter of Appeal to the **Group Finance Manager, at the academy's address**. You will receive a decision on your appeal within two weeks of our receipt of the appeal. If you are still not satisfied with the decision, you should use the academy's usual Complaints Procedure.

## Future changes to the Bursary Scheme

As the Bursary Scheme is always evolving, we monitor closely its implementation for consistency, fairness, appropriateness and impact. Where we feel that improvements can be made, we will make the necessary changes at appropriate points during the academic year 2019-2020 and a thorough review of the Scheme will take place for the academic year 2020-2021.

**Please make sure all documentation and supporting evidence copies are supplied. If original documentary evidence is submitted they will be returned. Missing documents will hold up your application.**

Please note that the Bursary is paid in arrears where monetary payments are made. The academy may substitute travel passes, meal vouchers or other non-monetary items at the academy's discretion.

## **Privacy Notice for Students and Parents – Trinity Sixth Form Academy Bursary Scheme**

This privacy notice explains how the academy use your personal information. If you have any questions about the way we use your personal data, please contact our Data Protection Officer by email at [dataprotection@trinitymat.org](mailto:dataprotection@trinitymat.org)

Your personal information is used by us to exercise our official authority to provide further education services within the legislative framework of the Further and Higher Education Act and the Education (Government of Further Education Colleges) Regulations 1992. We also have requirements placed on us by the Department for Education (DfE), and the Education and Skills Funding Agency (ESFA).

### **What information do we collect about you?**

We collect information from you when you submit an application to the TSFA Bursary Scheme. The information we collect includes your name, address, contact details, date of birth and information about your household and personal circumstances.

### **How will we use information about you?**

We will use the information you provide to process your application for the TAH Bursary Scheme. We also pass information to relevant government bodies and agencies as part of our mandatory duty. You can view a separate privacy notice from the Education and Skills Funding Agency on behalf of the Department for Education at the end of this notice.

Your information will be securely destroyed after it is no longer required for these purposes, in accordance with our retention policy. You can request a copy of this policy from the academy's Data Protection Officer.

### **Special Categories of Information**

The academy will also ask you to provide information relating to your residency and nationality, and information relating to benefits your household may receive which may be relevant to your health and other personal circumstances. This information is used to assess your eligibility under the categories of the bursary, and to ensure that we meet our obligations under the Equality Duty.

If you would like to discuss this further, please do not hesitate to contact us.

## Privacy Notice 2019 to 2020 Education and Skills Funding Agency

### How we use your personal information

This privacy notice is issued by the Education and Skills Funding Agency (ESFA) on behalf of the Secretary of State for the Department of Education (DfE). It is to inform learners how their personal information will be used by the DfE, the ESFA (an executive agency of the DfE) and any successor bodies to these organisations.

For the purposes of relevant data protection legislation, the DfE is the data controller for personal data processed by the ESFA. Your personal information is used by the DfE to exercise its functions and to meet its statutory responsibilities, including under the Apprenticeships, Skills, Children and Learning Act 2009 and to create and maintain a unique learner number (ULN) and a personal learning record (PLR). Your information will be securely destroyed after it is no longer required for these purposes.

Your information may be shared with third parties for education, training, employment and well-being related purposes, including for research.

The English European Social Fund (ESF) Managing Authority (or agents acting on its behalf) may contact you in order for them to carry out research and evaluation to inform the effectiveness of training.

Your information may also be shared with other third parties for the above purposes but only where the law allows it and the sharing is in compliance with the data protection legislation.

You can agree to be contacted for other purposes by ticking any of the following boxes:

- About courses or learning opportunities
- For surveys and research

Methods of contact, please indicate your preferred contact:

- By post
- By phone
- By email

Further information about use of and access to your personal data, details of organisations with whom we regularly share data, information about how long we retain your data, and how to change your consent to being contacted, please visit:

<https://www.gov.uk/government/publications/esfa-privacy-notice>



Student to complete details below:	
Your First Name (Please Print):	Surname (Please Print):

Education  
and Skills  
Funding  
Agency  
(ESFA)

## Trinity Sixth Form Academy

# Bursary Application Form 2019/2020

You are eligible to apply for a Trinity Sixth Form Academy Bursary if:

- You have enrolled on a full-time course at Trinity Sixth Form Academy in the academic year 2018/2019
- You are aged 16 to 19 years (**under 19 on 31 August 2019**)
- be aged 19 or over at 31 August 2018 and have an Education, Health and Care Plan (EHCP)
- be aged 19 or over at 31 August 2018 and continuing on a study programme they began aged 16 to 18 ('19+ continuers')
- You satisfy the residency criteria (please see Procedures and Guidelines)

### First Deadline for Applications: 13 September 2019

Application forms received later than 13 September WILL be considered for inclusion in a later Bursary intake\* [Application for the Bursary never closes, we will always look at new applications.](#)

Your Council Tax Bill and Housing Benefits/Universal Credit statement (where relevant) must be submitted with your application form.

**PLEASE READ 16-19 BURSARY 2019-2020 PROCEDURES AND GUIDANCE BEFORE COMPLETING THIS FORM**

Applications for the Bursary will fall into three categories. Please indicate which category you fall into.

<b>Category A - Students who:</b>	<b>Please tick</b>	<b>Documentation required</b>
<input type="checkbox"/> In Care <input type="checkbox"/> care leavers/or on a special guardianship order.		Written confirmation of their current or previous looked-after status from the relevant local authority - this is the local authority that looks after them or provides their leaving care services. The evidence could be a letter or an email but must be clearly from the local authority.
<input type="checkbox"/> Receiving Income Support, or Universal Credit 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.		A copy of their Income Support and/or Universal credit award notice. They must be entitled to the benefit in their own right and the evidence must confirm that the young person can be in further education or training, for students in receipt of Universal Credit must also provide additional documentation to confirm their independent status, for example a tenancy agreement in the student's name, a child benefit receipt, children's birth certificates, utility bills etc.
<input type="checkbox"/> Receiving 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.		A copy of the student's Universal Credit or ESA award from DWP (UC claimants will be able to print off details of their award from their journal). Evidence of receipt of Disability Living Allowance or Personal Independence Payment, must also be provided
Students in this category will be entitled to a Bursary payment, in cash or goods, (determined by the Academy) amounting to £1,200 per year.		
<b>Category B</b>		
<input type="checkbox"/> Students from households in receipt of Working Tax Credits or Child Tax Credits or Universal Credit Letter where the total gross annual income (including any benefits or Tax Credits) is less than <b>£25,000</b> . Students who fall near the threshold are advised to apply as we constantly review the bursary.		Your full up to date letter (all pages i.e. 4, 6, or 8 pages) from DWP confirming annual income and allocation of tax credits or universal credit letter and a P60. If the household is a single adult household we will also need a copy of documentation to confirm this e.g. Council Tax Discount letter.
<b>Category C</b>		
<input type="checkbox"/> Students who may or may not be in the above categories but who are experiencing significant financial hardship due to current/changed circumstances or with an exceptional situation. <input type="checkbox"/> NOTE: Students making a category C application must complete the 'Additional Information' section (section 5).		Supporting letter from parent signed by both the student and the parent/carer. Further documentation may be required.  <b>Proof of household income (as in Cat B above).</b>

### **Eligibility and payment**

Eligibility and payment amounts are dependent upon the number of applications received. Thresholds may be adjusted in the event of a high/reduced number of applicants who meet the criteria and consequently monetary payments may increase or decrease mid-term to adjust to the numbers accepted onto the bursary. Our assessment will consist **only** of your household income (with consideration of whether you have exemption from Council Tax and your housing benefit status).

### **Payment Method**

Payments may be made either by bank transfer to the students account, travel passes, meal vouchers, or maybe a combination of both, or any other method deemed appropriate. The payment method is at the discretion of the academy and may be amended at any time at the discretion of the academy.

### **APPLICATION PROCESS**

In order to assess your application, we will need you and your parents/carers\* (\*except where you are an independent student) to provide us with evidence of your financial situation. You **MUST** provide **full** details of the income of any adults in your household. Failure to include this information with appropriate documentation will mean that it is not possible to process your application. We will deal with your application in the strictest confidence and any personal information provided will remain private and be stored securely. Please see the privacy notice in the guidance notes for further information.

Where evidence is requested, we require clear, high quality copies. When assessed, you will receive an email outlining the decision with details as to your allocation (if successful) **or** a letter informing you as to the reason why the application was unsuccessful.



## SECTION 1 - PERSONAL DETAILS (Student)

Name of student:	<b>First name(s) PLEASE PRINT</b>	<b>Surname PLEASE PRINT</b>

Date of birth (day/month/year)

D	D
---	---

M	M
---	---

Y	Y	Y	Y
---	---	---	---

Address 1	
Address 2	
Town / City	
Post code	
Telephone No	
Mobile number	
Email	
Nationality	

### YOUNG CARER

1. Are you (The Student) currently a young carer registered with your local authority?

If so please name authority: \_\_\_\_\_.

**Please supply evidence of above.**

2. Who do you care for?

NAME

RELATIONSHIP

1. \_\_\_\_\_

\_\_\_\_\_

2. \_\_\_\_\_

\_\_\_\_\_

**RESIDENCY**

UK  EU/EEA/Swiss nat.  Settled status

Other  Please state .....

	YES	NO
Have you lived in Britain for the last three years		
Did you receive the Bursary in previous years		
Have you received free school meals in the last academic year		

**IF YES, please supply evidence of free school meals.**

**What is your course of study at TAH?** List the subjects.  
(e.g. AS Psychology, AS Biology, AS Art, AS Dance or e.g. BTEC First Diploma in Business)

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.....

	YES	NO
Do you have any siblings (brothers / sisters) who <b>currently study</b> at TSFA?		
Has the sibling named below applied for the Bursary?		

**Name of sibling:** .....

**Date of birth of sibling:** .....

Please advise the number of siblings, in main stream education, and infants living in your house	
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**SECTION 2 - HOUSEHOLD DETAILS**

How many adults live in your household? <b>Please do not count older siblings (brothers/sisters) in this number</b>	
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Who do you live with? Please tick appropriate option.

Mother & Father	
Mother only	
Father only	
Mother & Mother's Partner	
Father & Father's Partner	

Grandparent/s only, no parents	
I live Independently	
Children's Res Home / Foster Care	
With my partner only, Boy/Girl Friend	
Other	

Other domestic situation: please outline. \_\_\_\_\_  
\_\_\_\_\_

### **SECTION 3 - DETAILS OF ADULTS WHO ARE RESIDENT IN THE STUDENT'S HOUSEHOLD (to be completed by all students)**

<b>Adult 1</b>	<b>Adult 2</b>
Name	Name
Address	Address
Postcode	Postcode
Relationship to applicant (student)	Relationship to applicant
Contact telephone number Home: Mobile:	Contact telephone number Home: Mobile:
Email address	Email address
Employment status (e.g. employed, unemployed, self-employed) <b>Please state</b>	Employment status (e.g. employed, unemployed, self-employed) <b>Please state</b>
Occupation	Occupation

### **SECTION 4 – HOUSEHOLD INCOME**

To Be Completed by Category B & C Applicants

Are adults in your household in receipt of any of the following benefits?

	<b>ADULT 1</b>	<b>ADULT 2</b>
<b>Income Support / Universal Credit</b>		
<b>Jobseekers Allowance</b>		
<b>Employment &amp; Support Allowance</b>		
<b>Personal Independent Payment</b>		
<b>Disability or Carers Allowance</b>		
<b>Child Tax Credit</b>		
<b>Working Tax Credit</b>		
<b>Pensions</b>		

What is your <b>Gross annual income</b> , without Tax Credits	
What is your total GROSS annual household Income? This is your gross annual salary and / or any Pensions, Benefits and Tax Credits, income from investments you may receive.	
Do you have any savings/investments? If so please provide full details. Answer Yes or NO	
Do adults in your household have other income / job not stated above. Answer Yes or NO	

	YES	NO
Do adults in your household receive Housing Benefits?		
Do adults in your household pay Council Tax?		

### Evidence Required

- We will require a copy of your DWP **Final** Tax Credit Award letter (2018-19) or any for 2018-2019 which confirms your household income and that you are in receipt of Working Tax Credits or Child Tax Credits and/or a Current Universal credit Letter along with a current copy of your P60.
- If you are **self-employed**, we require your SA302 documentation **from** HMRC, an up to date copy of your business accounts i.e.(current trading profit and loss accounts and balance sheets) plus the last three months' bank statements for all parents/carers.

## SECTION 5 - TO BE COMPLETED BY CATEGORY C APPLICANTS ONLY

Additional Information – please outline your reasons for requiring financial assistance from the Trinity Sixth Form Academy Bursary fund.

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## SECTION 6 – Financial Assistance

Please tick which types of financial assistance you would require.

- Travel (only eligible if you live over 2 miles away)
- Meals Assistance
- Visits
- Equipment
- Other (please specify) \_\_\_\_\_

## SECTION 7 - DECLARATIONS

### STUDENT DECLARATION

To be completed by all applicants:

- I declare that all the answers given in this form are true.
- I have read the guidance and accept the conditions of any bursary awarded to me.
- I understand that if I give false information or withhold information my application will be cancelled and action will be taken, where appropriate, to recover any money paid to me.
- I accept that I will need to refund any sum arising from an overpayment for any reason.
- I understand that, if I do not keep to the conditions of my learning agreement, payments may be withheld.
- I understand that, if I leave the academy, I will not be entitled to further payments.
- I understand that the information provided may be shared with other agencies for the purposes of verification and prevention of fraud. **Cases of fraud may be prosecuted.**

Signed (student) ..... Date .....

Print name .....

### ADULT DECLARATION

*This section must be completed by the applicant's parent/carer(s) as applications for the TSFA Bursary will be assessed against household income.*

- I/We declare that, to the best of my/our knowledge, all the information given in connection with the application is full and correct in every respect.
- I/we will provide any additional information which may be required by the academy to verify my/our circumstances.
- I/we will inform the academy of any changes in financial circumstances which may affect the award.
- I/we understand that if my/our child does not keep to the condition of their Learning Agreement, payments may be withheld.
- I/we understand that, if my/our child leaves the academy, he/she will not be entitled to any further payments.
- I/we understand that the information provided may be shared with other agencies for the purposes of verification and prevention of fraud. **Cases of fraud may be prosecuted.**

#### Adult 1

Signed ..... Print name ..... Date .....

#### Adult 2

Signed ..... Print name ..... Date .....

**Please check your application form and make sure all the following areas have been completed and supporting documentation COPIES submitted.**

**Please check and ✓**

- |                                                 |                          |
|-------------------------------------------------|--------------------------|
| 1. Students name on front of documents (Page 1) | <input type="checkbox"/> |
| 2. Course of study                              | <input type="checkbox"/> |
| 3. All benefits claimed                         | <input type="checkbox"/> |
| 4. Adults employment status                     | <input type="checkbox"/> |
| 5. Student name, date and signature             | <input type="checkbox"/> |
| 6. All relevant adults name, date and signature | <input type="checkbox"/> |

**Documentation Supplied**

- |                                                                      |                          |
|----------------------------------------------------------------------|--------------------------|
| 1. Full copies of Tax Credits Awards, either;                        |                          |
| <b>FINAL</b> Tax Credit Award for Year 2018-2019                     | <input type="checkbox"/> |
| OR                                                                   |                          |
| Any 2019 Tax Credit documents with full income shown                 | <input type="checkbox"/> |
| 2. Full copies of current (April 2019 onwards) of                    |                          |
| Income Support documents                                             | <input type="checkbox"/> |
| Job Seekers Allowance documents                                      | <input type="checkbox"/> |
| Employment Support Allowance documents                               | <input type="checkbox"/> |
| Universal Credit documents                                           | <input type="checkbox"/> |
| Personal Independence Payment documents                              | <input type="checkbox"/> |
| Other State Benefits like Disability allowances, Mobility allowance. | <input type="checkbox"/> |
| P60                                                                  | <input type="checkbox"/> |
| 3. Copies of current 2019 Council Tax Bill                           | <input type="checkbox"/> |
| 4. Copies of current 2019 Housing Benefit Bill                       | <input type="checkbox"/> |

**Self Employed.**

- |                                                                                       |                          |
|---------------------------------------------------------------------------------------|--------------------------|
| Copy of SA302                                                                         | <input type="checkbox"/> |
| Current set of accounts detailing trading profit and loss account and balance sheet   | <input type="checkbox"/> |
| Tax Credits/benefit forms as above                                                    | <input type="checkbox"/> |
| Free meals in further education (FMFE) – self-employment eligibility declaration form | <input type="checkbox"/> |
| 3 months bank statements                                                              | <input type="checkbox"/> |

**Please make sure all documentation and supporting evidence copies are supplied.**

**Assessment and Approval 2019/20  
FOR OFFICE USE ONLY**

**Eligibility – Please tick appropriate box (✓)**

Learner Name:	D.O.B:
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<b>Vulnerable Bursary</b> CAT A	<input type="checkbox"/>	<ul style="list-style-type: none"> <li>• Those young people who receive income support/universal credit</li> <li>• Care Leavers or young people who are looked after children</li> <li>• Disabled young people in receipt of both Employment Support Allowance and Disability Living Allowance</li> </ul>
<b>Discretionary Bursary</b> CAT B CAT C	<input type="checkbox"/> <input type="checkbox"/>	<ul style="list-style-type: none"> <li>• Young people facing financial barriers to participation in further education. Agreed standards of behavior and attendance should be met.</li> </ul>

Assistance Required	Assistance Granted
Travel	<input type="checkbox"/>
Meals: Breakfast <input type="checkbox"/> (and/or) Lunch <input type="checkbox"/> (and/or) Tea <input type="checkbox"/>	<input type="checkbox"/>
Appropriate Clothing to suit training and placement requirements	<input type="checkbox"/>
Equipment	<input type="checkbox"/>
Any Other	<input type="checkbox"/>
<b>NOTE – Must fall within guide amounts</b>	

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_ Position: \_\_\_\_\_