

## TreeHouse School 16-19 Bursary Fund 2017-2018

The government provides two types of Bursary Funds for 16-19 year old students:

- Vulnerable Student Bursaries
- Discretionary Bursaries

### 1. Eligibility

To be eligible for the bursary students must:

- be aged 16 or over but under 19 at 31 August 2017 or
- For the discretionary bursary only, be aged 19 or over at 31 August 2017 and have an Education, Health and Care Plan (EHCP)
- For the discretionary bursary only, be aged 19 or over at 31 August 2017 and continuing on a study programme they began aged 16 to 18
- meet the residency criteria
- For the vulnerable bursary only must be one of the defined groups and studying for 30 weeks or more

#### 1.1 Residency Criteria

Students must also satisfy the residency criteria set out in the Education and Skills Funding Agency (ESFA) Funding regulation guidance 2017 to 2018 academic year as detailed below:

A person on the 'relevant date'<sup>1</sup> 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 three years preceding the 'relevant date'. 'Settled' means having either indefinite leave to enter or remain (ILE/ILR) or having the right of abode in the UK. British citizens and certain other people have the right of abode in the UK.

- European Community-United Kingdom of Great Britain and Northern Ireland passports.
- 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.

<sup>1</sup> The term 'relevant date' refers to 'the first day of the first academic (or teaching) year of the course' and this is defined as:

- 1 September if the academic year starts between 1 August and 31 December,
- 1 January if the academic year starts between 1 January and 31 March,
- 1 April if the academic year starts between 1 April and 30 June,
- 1 July if the academic year starts between 1 July and 31 July.

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Students studying under reciprocal exchange agreements.

Students who are children of Turkish workers where the Turkish worker has been lawfully employed and resident in the UK at any time in the past and where the student has been resident in the EEA and Turkey for the full three-year period prior to the commencement of their programme.

In addition to considering the groups outlined above, the ESFA will also consider the following groups of students to be eligible for funding.

- a) 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
- b) 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)

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

- a) those who are accompanying or joining parents or spouses or civil partners<sup>2</sup> 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 EEA nationals), or those who are children of diplomats.
- b) those who are dependants of teachers coming to the UK on a teacher-exchange scheme.
- c) those who are entering the UK (where not accompanied by their parents) who are British (or EEA) citizens or those whose passports have been endorsed 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.
- d) asylum seekers.
- e) those who are (including unaccompanied asylum seekers) placed in the care of social services or those in receipt of Section 4 support<sup>3</sup>.

<sup>2</sup> All eligibility references to a spouse should now be read to include a person who has participated in either a formal state-recognised marriage or a state-recognised civil partnership ceremony.

<sup>3</sup> Section 4 of the Immigration and Asylum Act 1999 allows National Asylum Support Service to provide full-board accommodation outside London for destitute asylum seekers who have exhausted all their appeal rights but are unable to return home. Section 4 support is also known as 'hard case support'.

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## 2. Vulnerable Student Bursaries

The following groups are defined as vulnerable groups:

- Young people in care
- Care leavers
- Young people in receipt of Income Support (IS) or Universal Credit (UC) in place of Income Support in their own right
- Young people in receipt of Employment and Support Allowance (ESA) or Universal Credit (UC) who are also in receipt of Disability Living Allowance (DLA) or Personal Independence Payments (PIP) in their own right

Where pupils meet the eligibility criteria, the residency criteria and one or more of the criteria above they are eligible for a bursary of £1,200 (which is calculated on a pro-rata basis where appropriate, at a maximum rate of £40 per week). Full time is defined as 5 days for 30 weeks (teaching weeks) or more.

The Vulnerable bursary can be claimed for each academic year the pupil is in education or training, as long as they continue to meet the eligibility criteria.

The agreed standard for a pupil's attendance would be expected to be 95% or above should a bursary be awarded. An exception to this may be in circumstances where a pupil's health and/or medical needs impact upon their attendance, in which case discretion would be exercised at the Headteacher's authority.

Due to the nature of the pupils special needs who attend the school it would be difficult to set a standard for behaviour / attainment that would be meaningful for all our pupils.

Please complete the form in Appendix 1 and supply the necessary evidence so that the school can apply to the Education and Skills Funding Agency (ESFA) via the Learner Support Service who will normally make a decision within two weeks. The deadline for submission of a claim to the ESFA is 31<sup>st</sup> July 2018.

## 3. Discretionary Bursaries

TreeHouse School will administer the Bursary Fund awarded within the Education and Skills Funding Agency's (ESFA) 16-19 Bursary Fund Guidelines.

The funding for 2017-2018 is £2,789.00.

This may be awarded on an identified needs basis to pupils to help them overcome the individual barriers to participation they face such as books, equipment, transport, meals, accommodation, exam re-sit fees and other

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miscellaneous items associated with being in learning and that meet the following assessment criteria:

- Applicants must meet the eligibility criteria and the residency criteria
- Evidence of household income below £25,521 must accompany the application prior to assessment. Based on the information received and if financial hardship is identified, the learner will be provided/reimbursed with:
  - Contribution toward meal expenditure for school meals
  - Re-imburement of travel costs upon submission of evidence. e.g. travel tickets/weekly pass
  - Other as mentioned above.

The agreed standard for a pupil's attendance would be expected to be 95% or above should a bursary be awarded. An exception to this may be in circumstances where a pupil's health and/or medical needs impact upon their attendance, in which case discretion would be exercised at the Headteacher's authority.

Due to the nature of the pupils special needs who attend the school it would be difficult to set a standard for behaviour / attainment that would be meaningful for all our pupils.

Please complete the form in Appendix 2 and supply the necessary evidence so that the school can consider the application. A meeting of the School Leadership will be convened to consider your application and usually a decision will be made with 4 weeks.

The outcome of the decision will be advised in writing.

When the Discretionary Bursary Fund is exhausted the school will advise via the School Newsletter and no further applications will be considered until further funding is received from the ESFA.

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#### 4. Impact of bursaries on Department of Work and Pension (DWP) benefits

Receipt of bursary funding does not affect receipt other means-tested benefits paid to families, such as Income Support, Jobseeker’s Allowance, Child Benefit, Working Tax Credit and Housing Benefit.

However, if the pupil is in receipt of Disability Living Allowance (or Personal Independence Payments) and Employment Support Allowance or in receipt of Universal Credit, parents can no longer receive certain household/family benefits for that child, such as child benefit.

#### 5. Complaints/Appeals process

All complaints/appeals must be made in writing:

Complaints/appeals fall into 2 categories which are:

- If the complaint concerns an operational processes or a complaint about customer service this will be dealt with under the TreeHouse School complaints procedure.  
If the complaint or appeal is not resolved than it will be passed to the Education and Skills Funding Agency (ESFA).
- If the complaint/appeal concerns 16 to 19 Bursary Fund policy then it will be referred to the ESFA policy manager.

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### Appendix 1 Vulnerable Bursary Application Form

Please completed the form and submit it together with your supporting evidence to the Headteacher.

Title				
Surname				
First name				
Address				
Postcode				
Phone/Mobile				
Email				
Date of Birth (DD/MM/YY)				
Your Age	<i>You must be 16, 17 or 18 (i.e. under 19 on 31<sup>st</sup> August 2017 to apply)</i>			
Have you the right of abode and been resident in the UK for the last 3 years?	Yes		No	

### Vulnerable Bursary Criteria

To qualify you must be aged 16 or over and under 19 on 31 August 2017 and meet the Education and Skills Funding Agency (ESFA) residency criteria. The bursary is paid to enable you to attend education with us and will only be paid if your attendance and behaviour meet the required standard.

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 <b>both</b> Employment Support Allowance (ESA) and Disability Living Allowance (DLA)/Personal Independence Payments (PIP)? (evidence required – financial statement showing <b>both</b> ESA and DLA/PIP)	Yes		No	

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Please provide your bank details below as printed on your bank card or statement.

Bursary payments will be paid directly into pupils' bank accounts only (by BACS). Please be aware that the school can choose to pay Bursary awards 'in kind', e.g. by purchasing equipment required.

Account Name								
Account Number								
Sort Code			-			-		

### 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 the monies I receive under the Bursary Scheme will be paid on condition of the standards of attendance and behaviour, as explained in the TreeHouse School 16-19 Bursary Fund document.
- 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 TreeHouse School immediately.
- I will notify TreeHouse School of 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 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 equipment.
- I understand I have the right to appeal if I disagree with the outcome of my Bursary Application. This appeal should be made in writing to TreeHouse School, but if I feel I have not been treated fairly, I can follow the TreeHouse School complaints procedure.

Applicant Signature		Date	
Pupil's Representative (if Applicant unable to make own application)		Date	
Capacity of Pupil's Representative			

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## Appendix 2 Discretionary Bursary Application Form

Please completed the form and submit it together with your supporting evidence to the Headteacher.

Title				
Surname				
Firstname				
Address				
Postcode				
Phone/Mobile				
Email				
Date of Birth (DD/MM/YY)				
Your Age	<i>You must be 16, 17 or 18 (i.e. under 19 on 31<sup>st</sup> August 2017 to apply)</i>			
Have you the right of abode and been resident in the UK for the last 3 years?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>

### Discretionary Bursary Criteria

To qualify you must be aged 16 or over and under 19 on 31 August 2017 and meet the Education and Skills Funding Agency (ESFA) residency criteria. The bursary is paid to enable you to attend education with us and will only be paid if your attendance and behaviour meet the required standard.

Your household income is one of the criteria which will help us to assess your application. If your household income exceeds £25,521, 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.**

P60	<input type="checkbox"/>	Income Support / Universal Credit (award letter)	<input type="checkbox"/>
Self-employed earnings (official tax return)	<input type="checkbox"/>	Full Tax Credit Award Notice	<input type="checkbox"/>
Wage Slips (most recent wage slips)	<input type="checkbox"/>	Other benefits/pension (award letter)	<input type="checkbox"/>
Number of dependent children in the household	<input type="text"/>		

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### 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 and for how much you will need during the academic year.

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

<b>Assistance Requested (please provide details)</b>	<b>Amount Required</b>	<b>Number of Days</b>	<b>Office Use Only (Total)</b>
Travel			
Meals			
Appropriate clothing to suit training and placement requirements			
Equipment			
Any other			

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

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Please provide your bank details below as printed on your bank card or statement. Bursary payments will be paid directly into pupils' bank accounts only (by BACS). Please be aware that the school can choose to pay Bursary awards 'in kind', e.g. by purchasing equipment required.

Account Name								
Account Number								
Sort Code			-			-		

### 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 the monies I receive under the Bursary Scheme will be paid on condition of the standards of attendance and behaviour, as explained in the TreeHouse School 16-19 Bursary Fund document.
- **Holidays will be unpaid.**
- 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 TreeHouse School immediately.
- I will notify TreeHouse School of 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 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 travel, books, meal costs.
- I understand I have the right to appeal if I disagree with the outcome of my Bursary Application. This appeal should be made in writing to TreeHouse School, but if I feel I have not been treated fairly, I can follow the TreeHouse School complaints procedure.

Applicant Signature		Date	
Pupil's Representative (if Applicant unable to make own application)		Date	
Capacity of Pupil's Representative			

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