

Lincoln University Technical College  
A College for Science & Engineering



# Bursary Fund Policy

## **Equality and Diversity Statement**

Lincoln UTC strives to treat all its members and visitors fairly and aims to eliminate unjustifiable discrimination on the grounds of gender, race, nationality, ethnic or national origin, political beliefs or practices, disability, marital status, family circumstances, sexual orientation, spent criminal convictions, age or any other inappropriate grounds.

### **Policy Review**

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# LINCOLN UTC

## 16-19 BURSARY FUND POLICY

### CONTENTS

<b>Para</b>	<b>Contents</b>
1	Introduction
2	Aims of the policy
3	Responsibility
4	Eligibility
5	Publicising the funds
6	The application procedure
7	Appeals
8	Complaint
9	Management of the Fund
10	Storage of records
11	Review
12	Application form for the 16-19 Bursary Fund
	Letter to successful applicant
	Letter to unsuccessful applicant

# LINCOLN UTC

## 16-19 BURSARY FUND POLICY

### 1. INTRODUCTION

A key priority for the Government is to close the gap in attainment between those from less well-off and more affluent backgrounds, and to ensure every young person participates in and benefits from a place in 16 to 19 education or training. The 16-19 Bursary Fund targets support towards the most financially disadvantaged Post 16 students - who most need help with the costs of staying on in education with the UTC. Lincoln UTC will determine the eligibility criteria for discretionary bursaries, and the frequency of and conditions for payments for all awards. The 16-19 Bursary will only be awarded to a student that is eligible and facing genuine financial barriers to participating.

*NB. The fund is a fixed and finite sum and allocations may therefore not exceed the total sum available.*

### 2. AIMS OF THE POLICY

The aim of this policy is to set out fair, equitable and objective criteria for approving such applications and to ensure affordability.

### 3. RESPONSIBILITY

The following employees will be responsible for ensuring this policy is adhered to:

- Principal
- Vice Principal: Business Operations
- Finance Manager

### 4. ELIGIBILITY

To qualify you must be aged under 19 on the 31st of August in the academic year in which you start your programme of study and a legal resident of the UK or a registered asylum seeker. If you are in any doubt, please speak with the Finance Manager. Students should be participating in educational provision that is subject to inspection by a public body that assures quality and is funded within the relevant guidelines.

There are three levels of bursary and you can apply for **ONE** only:

#### Bursary Fund Levels

##### Level One

Students in the following defined vulnerable groups will be eligible for a bursary of £1,200 a year:

- Young people who are in care; young care leavers
- Young people in receipt of Income Support or Universal Credit in their own right
- Young people in receipt of both Disability Living Allowance (or Personal Independence Payments) and Employment Support Allowance (ESA) in their own right.

This would be paid in three installments of £400.00 at the start of each term by BACS transfer directly into the student account. Payments will be subject to review by the Bursary Awards Panel. An application form is available for students who believe they are eligible for a Bursary.

## **Level Two**

Students who are in receipt of free meals or have a total household income of £16,190 or less can apply for a monthly bursary. Household income can be evidenced by receipt of benefit and/or P60, Tax Credit Award Notice or evidence of self employment income. The allowance will be established upon agreement by the UTC to make awards to students. All evidence of household income will be in strict confidence.

Payments will be transferred monthly to the students' bank account via BACS upon authorisation from the UTC that the student has satisfied all the attendance and behaviour requirements. These payments will be made in arrears. There may be delays in some cases if there is any query regarding attendance. No student will receive more than £800 per year. Should entitlement to Free School Meals cease the Level Two Bursary will cease too.

Students will be informed of any non-payment in writing. However students should check their payments regularly and in the case of non-payment they should contact the Finance Office for clarification. An application form is available for students who believe they are eligible for a Bursary.

## **Level Three**

Students who have a total household income of between £16,190 and £25,000 can apply for a discretionary bursary for specific educational purposes. These include:

- Costs of transport
- Meals in UTC
- Books and Equipment
- Educational Trips

Household income can be evidenced by receipt of benefit and/or P60, Tax Credit Award Notice or evidence of self-employment income. All evidence of household income will be in strict confidence. No student will receive more than £200 per year. Payments will be made on an ad-hoc basis by BACS transfer directly into the student's bank account. An application form is available for students who believe they are eligible for a Bursary.

## **Additional rules**

- The Bursary must be used to pay for course related costs, such as books, equipment, clothing, trips and travel. Any award paid for a specific item (eg. books or equipment) may be deemed the property of the UTC and students may be requested to return it on completion of their course or if they withdraw early. Awards paid by the UTC for any of the above will count as part of the student's Bursary;
- Bursary payments are made directly to students **not** to their parents or carers;
- The full Bursary payment of £1,200 is based on a student's course lasting a minimum of 30 weeks. Students who are on courses lasting less than 30 weeks will be eligible for 1/30<sup>th</sup> of £1,200 (£40) for each week their course lasts;

- The Bursary will be paid monthly, in equal instalments, subject to a student's behaviour and attendance. The full monthly Bursary will be paid where the student's attendance is 98% or above. Where a student's attendance is below 98% the amount of monthly Bursary payment they will receive will be equivalent to their % attendance record. If their overall attendance subsequently decreases to 95% or below the bursary payment will cease;
- Bursary payments will cease immediately if a student withdraws early from their course, whatever the reason;
- Students receiving financial assistance from the UTC for transport to and from the UTC may have this amount deducted from the bursary prior to receiving it;
- If a student leaves the course within 12 weeks of receiving the bursary the amount paid must be paid back to the UTC immediately.

## **5. PUBLICISING THE FUNDS**

- The UTC will publicise the Funds through a variety of means. These include leaflets, through mentors and during the student induction programme.

## **6. THE APPLICATION PROCEDURE**

1. Students must complete the relevant application form(s) and return to the Finance Office.
2. All sections of the relevant application form(s) must be completed, otherwise a decision will be delayed until the appropriate sections are completed.
3. Evidence requested to support an application must be submitted, otherwise a decision will be delayed until appropriate evidence is received.
4. Evidence submitted must be current and clearly state the student's name and demonstrate that the student resides in the same household as the parent/guardian submitting evidence.
5. The Vice Principal: Business Operations will assess the applications and will, on all occasions, declare any interest to the Principal, such as close friendships or relatives. The Principal will ensure that the application is assessed by staff who have no personal interest in the application.
6. Where possible, awards agreed will be made by Internal Transfer to the student's department where the resource is to be deployed. Where awards are to be made direct to the student this will normally be by bank transfer, except in exceptional circumstances.
7. Students will receive written confirmation within 15 working days of the outcome of their application or whether further information is required.
8. The Vice Principal must at all times be aware of the contents of this Policy and must be aware of funds available before authorising an award.
9. All awards authorised by the Vice Principal should be checked by a member of the finance team before being submitted for payment.

## **7. APPEALS**

Where an application for support has been refused the student should be notified in writing of the decision and the reason. All appeals to be addressed to the Vice Principal.

The Vice Principal will provide the student with a written response to their appeal within 10 working days of receipt of correspondence.

## **8. COMPLAINTS**

Students who wish to make a verbal complaint should be directed in the first instance to the Vice Principal through the [enquiries@lincolnutc.co.uk](mailto:enquiries@lincolnutc.co.uk) email address.

If the student wishes to complain in writing then they can do so by writing to the Vice Principal at the UTC address:

Lincoln UTC  
Lindum Road  
Lincoln  
LN2 1PF

The Vice Principal will provide the student with a written response to their appeal within 10 working days of receipt of correspondence.

## **9. MANAGEMENT OF THE FUND**

The Vice Principal will be responsible for ensuring that a suitably robust recording system is in place that shows each individual transaction by detail code and that is able to show real-time information on current expenditure, free funds and committed funds. This will be reviewed regularly by the Principal.

## **10. STORAGE OF RECORDS**

All records **MUST**, at all times, be kept in a secure filing cabinet in Lincoln UTC premises. Records will be kept for at least 7 years from the end of the academic year in which the application was made before being destroyed.

## **11. POLICY REVIEW**

The policy will be reviewed by the Board of Directors as per the policy review cycle.

# Lincoln UTC 16-19 Bursary Fund Application Form

## Student Details

Surname:

First Name:

Address:

Date of Birth:

Home Telephone Number:

Mobile Phone Number:

## Bank Details

Name of Account Holder:

Name of Bank Account Number:

Sort Code Number:

## Bursary Applied for (circle one level only)

### Level 1

For students in care, care leavers, students receiving income support and disabled students receiving **both** Employment Support Allowance and Disability Living Allowance

### Level 2

For students who are currently in receipt of Free School Meals. Please state what the identifiable financial needs are, e.g. Textbook, transport, equipment etc.

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.....  
.....

### Level 3

Students who live in a household where the gross annual household income is less than £25,000. Please state what the identifiable financial needs are, e.g. Textbook, transport, equipment etc.

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.....  
.....  
.....

Please note evidence should be attached to support your application. If no evidence is appended the application will be refused automatically. Please ensure you specify the full details and costs of essential equipment, books and trips etc. as without this information we cannot accurately assess the level of financial support required.



## **Parent/Carer Details**

Surname:

First Name:

Address:

Postcode:

Email address:

Telephone Number Home:

Telephone Number Work:

Mobile Number:

## **Financial Information - Only required if applying for Level 3 Bursary**

All household income must be declared. Please include evidence with application.

Child Tax Credit per month:

Work Tax Credit per month:

Income Support per month:

Housing Allowance per month:

Jobseekers Allowance per month:

Pension Guarantee Credit per month:

Council Tax Benefit per month:

Child Benefit per month:

Income Related Employment & support Allowance per month:

Other Allowance (please specify) per month:

Basic Salary per month:

Total Household Income per month:

Total Annual Income (Total Monthly x 12) per year:

\*Household income – Income for all adults living in the property – including step parents, carers, partners and co-habitors.

**Please read and sign the declaration and return it with the application and documentary evidence in a sealed envelope to the Finance Office marked 'Bursary Application'.**

### **Declaration by Student and Parent / Carer**

I agree to my application being scrutinised by the Vice Principal, whose decision is final and not subject to any appeals process.

I understand that if I do not behave well, fail to adhere to the UTC code or my attendance is below 98% then my Bursary payment may be withdrawn without notice.

I confirm that, for Level 2 and 3 Bursaries, no other income or financial support is available from another household to support the student.

If I leave the UTC at any time within 12 weeks of a Bursary being awarded/paid then I will repay the funds given to me. I understand that should I fail to repay the funds the matter will be pursued via a Debt Collection Agency.

#### **I confirm that:**

The information I have given is, to my knowledge true and correct and Lincoln UTC may seek to confirm any details I have given.

I understand there will be a delay in any funds being released if the application form has not been correctly completed or appropriate evidence of income has not been supplied.

### **Data Protection Act**

#### **I understand that:**

The data contained on this form will be held on file for seven years and that Lincoln UTC may make enquiries about the validity of the information provided on this form from other central and/or local government bodies, as deemed appropriate by the UTC.

I hereby consent to the disclosure of any information sought in accordance with the application for the purposes of the Data Protection Act 1998.

The UTC has a duty to protect the public funds it administers and to this end may use the information provided on this form within this Authority for the prevention and detection of fraud. It may also share this information with other bodies administering public funds solely for these purposes.

Student signature:

Date:

Parent/Carer signature:

Date: