

<b>LORETTO BURSARY POLICY</b>		<b>No. 24</b>
<b>Date Reviewed:</b> <b>October 2019</b>	<b>Next Due:</b> <b>October 2022</b>	<b>Approved:</b> <b>February 2012</b>

The organisation has an established fund to which any employee may apply for funding to assist them in pursuing a work related item of study or research or to pursue a personal development goal. An award will not be made for applications relating to leisure pursuits.

Employees making an application for driving lessons must show the relevance to their current post or their career pathway. Awards for driving lessons will only be made to Support Workers, Support Assistants or equivalent posts.

Bursary applications are considered by a panel of Senior Managers twice yearly.

The dates for submitting applications are no later than 1st June and 1st December each year.

All applications will be considered together at this time. Loretto will endeavour to divide the fund equally between the two periods.

There is no minimum amount that can be requested from the fund, but unless in exceptional circumstances and/or where the fund is being under utilised, the maximum amount for each individual application will be £500.

An employee must have 12 months' continuous service prior to making an application.

There will be a limit of one application per employee every three years.

There are no limits (subject to available funds) on the number of employees who can apply from an individual service or section.

Successful applicants have a period of six months from the date of written notification to access any monies they have been awarded. Thereafter, the monies will no longer be available.

Should the fund be oversubscribed, the decision will be based on the date of receipt of the application, with those received first being given priority. Employee's whose application is refused on the grounds of the scheme being oversubscribed, may request that their application be considered in the next period.

## **PROCEDURE**

Employees wishing to make an application must: -

- Discuss the application informally with their Deputy Service/Service/Section Manager. Employees do not need their Manager's approval to proceed with the application, but do need their Manager to complete a statement detailing their opinion of the application. The panel may then contact the Manager for further information.
- The completed application form and the Manager's statement should be forwarded to the Human Resources Officer, no later than either of the dates identified for submitting applications.
- The bursary panel will normally consider the application within two weeks of the above date, and employees may be required to supply further information and/or to attend an interview. Applicants will be notified in writing if there is a delay in the timescales indicated.
- The panel will inform the applicant of the outcome of their application, whether successful or not in writing. If the applicant is unsuccessful, detailed reasons will be given within the outcome letter.
- The monies will be made available to successful applicants with immediate effect.
- Invoices or detailed receipts are required to be produced prior to monies being released.

## **Guidance for Managers**

Applicants applying for bursaries are obliged to discuss the application informally with their Deputy Service/Service/Section Manager before proceeding with the formal application.

The Deputy Service/Service/Section Manager has the responsibility for guiding the applicant through the process involved in applying for monies from the bursary fund and to ensure that the applicant has considered the following:

- Background details are as full as possible and are supported where possible with additional information.
- The amount being requested will cover the project in mind.
- Where time off from work is being requested, the applicant is able to be specific regarding this.
- The applicant is made aware that they may be asked to attend a meeting with the bursary panel to expand on the application details before a decision can be reached.
- The applicant is clear regarding what they will gain personally if their application is successful.
- All the application details are completed fully and any relevant supporting information is provided.

Managers are reminded that applicants do not need the approval of their Manager in order to submit the application, but they will be expected to provide a statement detailing their opinion of the employee's application.

It may be necessary for the bursary panel to contact the Manager regarding what the implications for the service/section and/or applicant may be as a result of a successful/unsuccessful application.

## **Bursary Application Form**

When applying for a bursary, please complete the bursary application form fully and provide supporting information. The information you provide should include the following:

Please include: -

- Name
- Service/section
- Date of application

- Employment history with Loretto
- Details of previous bursary applications
- Background details to the application, including any supporting information
- The total cost of what you are proposing including quotes or confirmation of the cost if possible
- The amount you are contributing
- The amount being requested from the organisation
- Details of any other subsidies being pursued
- Whether you will need time off work and if so the details of this
- What you are hoping to gain from pursuing the application
- Why you feel you should be successful in your application

The above information should be forwarded together with your Manager's statement of their opinion of the application to the Human Resources Officer, marked private and confidential.

Applications which are not fully completed or received without a statement from the Deputy Service/Service/Section Manager will not be considered.