16-19 Bursary Fund policy

*All policies are electronically signed and available on Governor Hub	
Ratified by the (Board of Trustees)	
Signed by the (Board of Trustees):	**Date: Nov 2026**
To be reviewed (annually):	**Date: Nov 2027**

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1. Aims

Our school aims to:

- Have clear and transparent processes for the use and allocation of 16 to 19 bursary funds
- Make clear to parents and students the type of support which is available and the means of applying for it.

2. Guidance

This policy is based on the Department for Education's (DfE) 16 to 19 Bursary Fund guide for 2026 to 2027 and the relevant 2026 to 2027 funding rules for post-16 provision. These documents set out the funding conditions that the school must follow when assessing eligibility, awarding support and making payments.16 to 19 Bursary Fund guidance - GOV.UK

This policy complies with our funding agreement and articles of association.

3. Definitions

'In care' is defined for the purposes of the 16 to 19 Bursary Fund as a child looked after by a local authority on a voluntary basis under section 20 of the Children Act 1989 or under a care order under section 31 of that Act. The term 'looked-after child' is defined in section 22 of the Children Act 1989.

'Care leaver' is defined as:

- A young person aged 16 or 17 who was previously looked after for at least 13 weeks (consecutively or in periods amounting to 13 weeks), which began after the age of 14 and ended after the age of 16; or

- A young person aged 18 or above who was looked after before turning 18 for at least 13 weeks (consecutively or in periods amounting to 13 weeks), which began after the age of 14 and ended after the age of 16.

4. Roles and responsibilities

4.1 The Governing Board

The Board of Trustees has overall responsibility for approving the 16 to 19 Bursary Fund policy and monitoring its implementation. It may delegate approval and/or monitoring responsibilities in accordance with the Trust's governance arrangements.

The governing board also has overall responsibility for monitoring the implementation of this policy.

In accordance with the school's current governance arrangements, responsibility for approving this policy is delegated to the Headteacher.

Monitoring the implementation of this policy has been delegated to the governor responsible for Quality of Education.

4.2 Head Teacher

The Headteacher is responsible for ensuring that relevant staff are familiar with this policy and that it is applied consistently and in accordance with the current DfE funding rules.

4.3 Staff

Staff involved in administering or supporting applications are responsible for applying this policy consistently, maintaining appropriate confidentiality and referring decisions or queries to the designated senior leader.

The senior leadership team will ensure that staff involved in administering the fund receive appropriate guidance on the policy and its implementation.

4.4 Parents

Parents and carers are encouraged to raise any concerns or queries about the 16 to 19 Bursary Fund with the relevant member of staff or the Headteacher. Where appropriate, the young person should be involved in discussions and decisions about their application.

5. How we use the bursary fund

Support is available to eligible students from the 16 to 19 bursary fund. See below for details of our eligibility criteria.

The 16 to 19 Bursary Fund is intended to help eligible learners overcome specific financial barriers to participation so that they can remain in education. Support will be directed towards learners who demonstrate the greatest financial need and will be based on an individual assessment of their actual, eligible participation costs.

The fund may be used to help meet essential costs directly related to participation in a learner's study programme, for example:

- Essential equipment, books, specialist clothing or learning resources required for the study programme.
- Travel costs to and from the school where these are not met by another source.
- Essential course-related visits, activities or field trips where the activity is clearly linked to the learner's study programme goals or course objectives.
- Necessary costs associated with attending interviews or open days where these are directly relevant to the learner's progression and are an eligible participation cost. All proposed expenditure must comply with the current DfE guidance.

The fund must not be used for general living costs, non-essential extra-curricular activities, learning support or pastoral services already provided by the school, laptop or tablet servicing, or costs that should be met from another statutory or public funding responsibility. It must not replace the local authority's statutory transport duty. Overseas trips are generally not eligible where equivalent learning can be accessed in England at a lower cost or where the trip is not essential to the study programme.

All awards, for both types of bursary, must be based on an individual assessment of actual need and eligible participation costs. Blanket, flat-rate or automatic payments are not permitted. The school will retain evidence of the assessment, the purpose and amount of the award, and relevant receipts or other evidence of expenditure.

6. Eligibility criteria

6.1 Age

To be eligible:

- A student must be aged 16 or over but under 19 on 31 August 2026 to be eligible for help from the bursary fund in the 2026 to 2027 academic year.
- Students aged 19 or over may only receive a discretionary bursary if they have an Education, Health and Care (EHC) plan or are continuing on the same study programme they began when aged 16 to 18 (a '19+ continuer'). They must continue to meet the relevant eligibility requirements and demonstrate a need for support.
- Students aged 19 or over are not eligible for a bursary for defined vulnerable groups.

6.2 Eligible education provision

The learner's provision must be subject to inspection by a public body that assures quality (for example, Ofsted) and must be funded directly by the DfE, funded by the DfE via a local authority, or otherwise publicly funded and lead to a qualification up to and including Level 3 that is accredited by Ofqual or on the DfE list of qualifications approved for funding.

Students are not eligible if they are enrolled at another institution that receives public funding for them, are on an apprenticeship programme or are undertaking any form of waged training.

6.3 Residency

Students must meet the residency requirements set out in the DfE's 2026 to 2027 funding rules for post-16 provision. The school will check the relevant criteria and retain the required evidence.Advice: funding regulations for post-16 provision - GOV.UK (www.gov.uk)

6.4 Asylum seekers

Accompanied asylum-seeking children (under 18 with an adult relative or partner) and asylum seekers aged 18 or over are generally entitled to education but are not entitled to public funds. Where an asylum-seeking young person has not had their asylum claim refused, the school may provide in-kind support, such as essential books, equipment or a travel pass. Cash payments must not be made to asylum seekers unless the young person is an unaccompanied asylum-seeking child.

Unaccompanied asylum-seeking children are the responsibility of the local authority and are treated as looked-after children. They may be eligible for a bursary for defined vulnerable groups where they meet the criteria and have an assessed financial need.

When an unaccompanied asylum-seeking young person reaches 18, their immigration status must be considered. If their asylum claim is decided in their favour, the local authority will treat them as a care leaver and they may remain eligible for the bursary for defined vulnerable groups until they reach the upper age limit. Eligibility must otherwise be considered in line with the current DfE guidance.

7. Bursaries for young people in defined vulnerable groups

Students who meet one of the four defined vulnerable-group criteria below, as well as the age and residency criteria, may be considered for a bursary for defined vulnerable groups. Funding of up to £1,200 is available for a study programme lasting 30 weeks or more, but the amount awarded must be based on the learner's assessed actual financial need and eligible participation costs. The £1,200 is not an automatic payment or entitlement.

The defined vulnerable groups are students who are:

- in care
- care leavers
- receiving Income Support (IS), or Universal Credit (UC) 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
- receiving Disability Living Allowance (DLA) or Personal Independence Payments (PIP) in their own right as well as Employment and Support Allowance (ESA) or UC in their own right

Each application will be assessed individually. Learners will only receive the amount of support they actually need to participate, supported by evidence of the costs. A learner who meets a vulnerable-group category but has no eligible financial need may receive no bursary. Any costs already met by the local authority or another source will be taken into account to avoid double funding.

The length and hours of the learner's study programme will be considered when assessing need. Learners on programmes lasting less than 30 weeks may require less support; awards will be based on actual costs and individual circumstances rather than an automatic pro-rata calculation.

We will obtain the following **proof of eligibility** for vulnerable groups:

- For learners who are in care or are care leavers, written confirmation (email or letter) of their current or previous looked-after status from the relevant local authority.
- For learners receiving Income Support or Universal Credit, a copy of the award notice showing the learner's name and confirming that they receive the benefit in their own right because they are financially supporting themselves, or themselves and a dependent living with them. The evidence must not include conditions that prevent participation in further education or training.
- For learners receiving Universal Credit or Employment and Support Allowance together with Disability Living Allowance or Personal Independence Payment, evidence of the relevant UC or ESA award and evidence of DLA or PIP. All relevant benefits must be received by the learner in their own right.

8. Discretionary bursaries

Discretionary bursaries are intended for learners who do not qualify for a bursary for defined vulnerable groups but who need financial help to overcome barriers to participating in their study programme. The school will use household income as part

of its assessment of eligibility and will also consider the learner's individual circumstances and actual eligible participation costs.

The school will set and publish a household income threshold for each academic year.

The threshold for 2026 to 2027 is £30,000. The Senior Leadership Team may consider an application in exceptional circumstances where household income exceeds the published threshold. Any such decision must be based on the learner's individual circumstances and evidenced financial need, and the reasons for the decision must be recorded.

To assess household income, the school may request one or more of the following forms of evidence:

- Evidence of relevant benefit entitlement or benefit award notices.
- Tax credit award notifications, where applicable.
- P60 or other evidence of annual income.
- Recent wage slips.
- Recent bank statements, where appropriate and proportionate.
- The three most recent Universal Credit monthly award statements, where applicable. These should be considered alongside any earnings shown on the statements to establish household income.

8.1. The school will assess household income annually unless it decides to use the DfE-permitted approach of checking income once at the start of a learner's study programme. If income is not checked annually, the learner must provide a signed and dated declaration confirming that household circumstances have not changed. The learner's actual participation needs must still be assessed each year.

9. Payment

9.1 Process

Payments will normally be made in kind wherever possible, for example by purchasing essential equipment or books, or arranging eligible travel support. Receipts and records of purchases must be retained.

- Where a payment to a learner is appropriate, it should normally be made into the learner's own bank account. If this is not possible and an alternative account is used, a signed agreement must be retained confirming that the money will be used for the learner's eligible educational participation costs. Payments must reflect assessed actual costs and must not be made as blanket or flat-rate awards.
- Applications should ideally be submitted during Autumn Term 1 to allow time to assess demand and make awards fairly. However, applications will remain open throughout the academic year because a learner's financial circumstances may change. Eligibility and actual need must be reviewed for each academic year.

9.2 Conditions for the receipt of bursary payments

Payments may be withheld or adjusted where a learner is not attending school. Before making a decision, the school will consider the individual circumstances and the impact that withholding support may have on the learner's ability to participate in education. Any conditions attached to payments will be explained to the learner.

In cases of severe hardship, the school may consider temporary emergency meal or travel support in line with the DfE guidance. This must be limited to the permitted purposes, recorded and evidenced, and followed by a full discretionary bursary assessment.

The school will retain records of applications, eligibility checks, individual assessments of need, decisions and reasons, the amount and purpose of each award, receipts and payment records. Records will be managed in accordance with the Trust's data protection and records-retention requirements.

10. UN Convention on the Rights of the Child (UNCRC) Articles

The principles of the UN Convention on the Rights of the Child are reflected in this policy. The bursary fund supports access to education and takes account of learners' rights and best interests.

- **Article 28** – Right to Education: supports learners' right to access education by providing financial aid to those facing barriers, ensuring they are not excluded due to economic constraints.
- **Article 29** – Goals of Education: Education is directed toward the development of the child's personality, talents, and abilities. The bursary fund helps learners stay in education, fulfilling this by supporting their personal and academic development.
- **Article 3** – Best Interests of the Child: this policy prioritises the best interests of students, ensuring fair access to financial resources that enable continued education.
- **Article 12** – Respect for the Views of the Child: When determining eligibility or handling disputes regarding the bursary fund, students should have the opportunity to express their views and be actively involved in decision-making processes.
- **Article 26** – Social Security: The bursary aligns with this article by providing a form of social security to young people in need, helping to cover education-related costs.
- **Article 2** – Non-Discrimination: The bursary fund should be equally available to all students, regardless of their background, ensuring no discrimination based on gender, ethnicity, or disability.

11. Changes

Description	Date	Page	Section
CRC Articles	20/09/24	9	12
Required attendance levels amended from no attendance for 4 weeks would equal no payment to we may withhold payment if the student is not attending school	20/10/24	8	9.2
Updated link to bursary guidance	20/10/24	3	2
Additional line about SLT authorising payments in exceptional circumstances	20/10/24	7	8
Update on alternative bank account can be used but a signed agreement will need to be in place for usage.	3/10/25	8	9.1
Reviewed and updated for 2026–27 DfE guidance; revised eligibility, permitted expenditure, evidence, assessment and payment arrangements.	05/11/26	Throughout	All sections