

16 – 19 Bursary Fund Policy

Contents

- 1.0 Aims and Scope
- 2.0 Guidance
- 3.0 Definitions
- 4.0 Roles and Responsibilities
- 5.0 How we use the Bursary Funding
- 6.0 Eligibility criteria for the 16 to 19 Bursaries
- 7.0 Bursaries for Young People in Defined Vulnerable Groups
- 8.0 Discretionary Bursaries
 - 8.1 Criteria and Assessment
 - 8.2 Emergency Meal and Travel Support
- 9.0 Application and Payment Process
 - 9.1 Applications
 - 9.2 Evidence
 - 9.3 Payment Process
 - 9.4 Conditions for receiving Bursary Funding
- 10.0 Change in Circumstances
- 11.0 Unspent Funds
- 12.0 Monitoring Arrangements
- 13.0 Complaints or Appeals
- 14.0 GDPR
- Appendix A - 16-19 Bursary Fund Application Form 2026-27
- Appendix B – Bursary Fund Assessment Checklist 2026-27
- Appendix C – Assessment Form 2026-27

1.0 Aims and Scope

The 16 to 19 bursary fund provides financial support to help pupils overcome the specific financial barriers to participation they face so they can remain in education.

There are 2 types of 16 to 19 bursaries and this policy refers to both:

- Bursaries for defined vulnerable groups
- Discretionary bursaries

This policy aims to:

- Set out clear and transparent processes for the use and allocation of 16 to 19 bursary funds
- Make sure that bursary funds are administered appropriately and fairly, with due regard to the Equality Act 2010
- Make clear to parents/carers and pupils the type of support that is available and how to apply for it
- Make clear to parents/carers and pupils the attendance and behaviour conditions for receiving the funds

2.0 Guidance

This policy is based on advice from the Department for Education (DfE) on the [16 to 19 bursary fund for the 2026 to 2027 academic year](#). This policy complies with our funding agreement and articles of association.

3.0 Definitions

- 'In care' is defined as: children looked after by a local authority on a voluntary basis ([section 20](#) of the Children Act 1989) or under a care order ([section 31](#) of the Children Act 1989)
- 'Looked after child' is defined as: a child in the care of a local authority or who is provided with accommodation by the authority in the exercise of any functions for more than 24 hours ([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 a period of at least 13 weeks consecutively (or periods amounting to at least 13 weeks), which began after the age of 14 and ended after the age of 16 (they can have entered care at any age, but they must have spent at least 13 weeks in care after their 14th birthday before leaving after the age of 16), or
 - A young person aged 18 or above who was looked after prior to becoming 18 for a period of at least 13 weeks consecutively (or periods amounting to at least 13 weeks), which began after the age of 14 and ended after the age of 16

4.0 Roles and Responsibilities

4.1. The Executive Leadership Team (ELT) has overall responsibility for:

- Approving this 16 to 19 bursary fund policy
- Monitoring the implementation of this policy
- Ensuring compliance with relevant requirements

4.2. The Academy Head is responsible for:

- Making sure that staff are familiar with this 16 to 19 bursary fund policy
- Making sure the policy is being applied consistently
- Setting eligibility criteria for bursary funding and making sure these comply with the Equality Act 2010
- Promoting awareness of the 16 to 19 bursary fund to prospective applicants and their parents/carers

4.3. The Bursary Panel is responsible for reviewing applications and supporting evidence in accordance with this policy. A Panel of 3 will consist of school staff as appointed by the Academy Head.

4.4. The Head of Service Finance is responsible for ensuring that the bursary funding is accounted for and reported accurately.

4.5. Our staff are responsible for implementing this 16 to 19 bursary fund policy consistently.

4.6. Parents/carers are also expected to notify staff or the Academy Head of:

- Any concerns or queries regarding this 16 to 19 bursary fund policy
- Any change in circumstances that might affect eligibility for bursary funding.

4.7. Pupils are responsible for meeting the conditions attached to the receipt of any support from the bursary funding.

5.0 How we use the Bursary Funding

Financial support is available to all eligible pupils from the 16 to 19 bursary fund. See sections 6, 7 and 8 below for details of our eligibility criteria.

The fund is intended to support pupils aged 16 to 19 in overcoming specific financial barriers to participation so they can remain in education.

There are 2 types of 16 to 19 bursaries:

- Bursaries for defined vulnerable groups; and
- Discretionary bursaries

We use the fund to provide pupils with support to fund:

- Transport
- Books and equipment
- Lunch
- Educational visits
- Clothing
- Specialist equipment
- Emergency meal and travel support

We will provide support for pupils from the bursary fund by making payments in kind where possible. It will not be provided as regular payments for living costs, non-essential extra-curricular activities or any learning support and pastoral services that we provide.

6.0 Eligibility criteria for the 16 to 19 Bursaries

Please note: the following eligibility criteria will be assessed **in addition** to the individual pupil's actual financial needs. This means there is no guarantee of funding.

- No pupil will automatically be awarded an amount of funding without an assessment of the level of actual financial need they have
- Funding provided to each eligible pupil is based on their actual participation needs (supported by evidence) and not a flat or fixed-rate payment that does not reflect the actual costs they face
- Pupils with no participation costs will not receive funding

6.1 Age

To be eligible for either bursary in the 2025 to 2026 academic year, pupils must be at least 16 years old but under 19 years old on 31 August 2025.

Pupils aged 19 or over are eligible only for a discretionary bursary (see section 8 below) if they:

- Are continuing on a study programme or course that they began when they were aged 16 to 18 years old (19+ continuers)
- Have an education, health and care (EHC) plan

Pupils aged 19 or over are not eligible for bursaries for defined vulnerable groups.

6.2 Eligible Education Provision

Pupils must be enrolled in the school's Post 16 provision that is subject to inspection by a public body that assures quality (e.g. Ofsted) and is funded directly by the DfE, or by the DfE via a local authority.

6.3 Residency

Pupils must meet the residency criteria in the DfE funding rules for 16 to 19 provision.

6.4 Asylum Seekers

Accompanied asylum seeking children (under 18 with an adult relative or partner), and asylum seekers aged 18 and above are entitled to education but are not entitled to public funds. If necessary, they can apply to the Home Office for suitable housing and cash for essentials.

We will provide in-kind support such as books, equipment and a travel pass to asylum seekers who have not had asylum refused.

Unaccompanied asylum-seeking children are:

- The responsibility of the local authority
- To be treated as 'looked after' children
- Eligible for a bursary for vulnerable groups, where they have a financial need

When these pupils reach 18 years old, we will consider their immigration status. They will still be eligible for a bursary as a pupil from a defined vulnerable group if the asylum claim is in their favour and will be treated as a 'care leaver' until they reach the upper age limit.

7.0 Bursaries for Young People in Defined Vulnerable Groups

Pupils with a financial need, who meet one of the following 4 criteria below, in addition to the criteria outlined in sections 6.1 to 6.4 above, can apply for a bursary for vulnerable groups.

The defined vulnerable groups are pupils who are:

- In care
 - Note: those who are privately fostered are not classed as looked after and are not eligible for the bursary for vulnerable groups
- Care leavers
 - Note: where a young person has left the care of the local authority via achieving permanence through an order, such as a Special Guardianship Order, they are a care leaver. They must meet the definition of a 'care leaver' in full (see section 3 of this policy) to be eligible for help from the bursary for vulnerable groups
- 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 (PIPs) in their own right, **as well as** Employment and Support Allowance (ESA) or UC in their own right
 - Note: pupils must be in receipt of DLA or PIP **and** ESA or UC to be eligible. Receipt of DLA or PIP alone does not meet the criteria

UC is replacing some benefits for new claimants, including IS and income related ESA, so current and future young people aged 16 to 18 will not be in receipt of 'legacy' benefits. However, pupils aged 19 to 25 and funded from the 16-19 budget (such as pupils with an EHC plan) may still receive 'legacy' benefits.

Pupils will be funded to reflect the amount of support they need to participate based on an assessment of the actual participation needs and costs they have.

Pupils who meet the criteria for a bursary for vulnerable groups are not automatically entitled to a bursary.

Pupils will not receive the bursary if they do not have any actual financial need (for example, because their financial needs are met from other sources and/or because they have no relevant costs). Should we refuse the application on this basis, we will discuss this with the pupil and their support worker/parent/carer where applicable.

Where a bursary is provided, the funds will generally be up to £1,200 per year for Post 16 provision lasting 30 weeks or more. When calculating the amount, cases will be looked at individually and the outcome based on a particular pupil's needs. Pupils will only receive the

amount they actually need to participate and will not automatically receive £1,200 if they do not need the full amount.

We can use our discretion, on a case-by-case basis, to provide more than £1,200 per year if it is necessary, in all the circumstances, for the pupil to remain in education. Any such additional payment will be paid either from the school's discretionary bursary allocation or the school's own funds.

We will review the pupil's eligibility position each academic year. Pupils will only continue to receive a bursary for vulnerable groups if they continue to satisfy the criteria.

8.0 Discretionary Bursaries

8.1 Criteria and Assessment

In addition to the criteria outlined in sections 6.1 to 6.4 above, pupils can apply for a discretionary bursary if they satisfy one or more of the following criteria:

- Pupils who are in receipt of free school meals
- Total household income (**excluding Disability Living Allowance and Child Benefit**) of below £43,000

Pupils who do not satisfy any of the criteria listed in this section, but who are able to demonstrate financial hardship arising from other reasons, may still apply for a discretionary bursary.

In assessing any application for a discretionary bursary, we will consider:

- Level of household income
- Distance to travel
- Number of dependent children in the household (the school will deduct £2,500 for each dependent child from eligible household income up to a maximum of 3 children)
- Pupils' additional responsibilities and needs

There is no set limit for the amount of discretionary bursary that can be awarded to pupils. We will base all decisions around which pupils receive a discretionary bursary, and how much bursary they receive, on each pupil's individual circumstances and their actual financial need. 5% of the discretionary bursary fund will be retained to cover administrative costs.

We will review the pupil's eligibility position each academic year. Pupils will only continue to receive a discretionary bursary if they continue to satisfy the criteria.

8.2 Emergency Meal and Travel Support

Pupils who face severe hardship can apply for emergency meal and travel support from the discretionary bursary, for the days they attend. At our discretion, we may provide this support without completing the usual household income and evidence checks.

Claims for emergency support can be made by pupils or their parents/carers directly to the school and will be assessed on an individual basis.

Emergency support will be a temporary arrangement, with a full discretionary bursary assessment completed as soon as practicable.

We will keep records and documentation related to emergency support for audit purposes.

9.0 Application and Payment Process

9.1 Applications

Applications should be submitted via email to bursaries.(name of school)@consortiumtrust.org.uk.

Applications should ideally be submitted by 30th September each year to allow enough time for schools to assess the overall level of demand and make discretionary awards on a fair basis. This date will be clearly stated on the application form.

However, we acknowledge that pupils' circumstances may change and therefore the application process will remain open for the whole school year.

The Bursary Panel will sit in October each year to assess each individual claim and authorise applications and then throughout the year as required.

Funding is not guaranteed by the acceptance of an application form. Applicants will be notified in writing (either via email or via letter) whether their application has been successful, together with the amount of funding awarded. If an applicant wishes to appeal the outcome of their application for a bursary, they must follow the school's complaints procedure. Any appeal should be made in writing within 10 school days of the outcome being communicated to the applicant.

Any enquiries about the application process should be directed to bursaries.(name of school)@consortiumtrust.org.uk.

9.2 Evidence

All applications for 16 to 19 bursaries must be supported by appropriate evidence, which we will verify. Examples of acceptable evidence we may request are:

- A copy of the UC or IS award notice from the Department of Work and Pensions (DWP) and/or evidence of receipt of DLA or PIP, in the pupil's name
- Documents such as a tenancy agreement in the pupil's name, a child benefit receipt, birth certificate or utility bills
- Written confirmation of the pupil's current or previous looked-after status from the relevant local authority

9.3 Payment Process

Payments are made using the following process:

- Made in-kind payments, such as travel passes, books and equipment, school lunches
- Direct into pupil bank accounts. Where a pupil cannot manage their own funds, the school will consider who will manage the bursary on the pupil's behalf

Cash payments will not be made in any circumstances.

9.4 Conditions for receiving Bursary Funding

Receipt of a vulnerable or discretionary bursary will be conditional on pupils meeting the agreed standards of behaviour set by the school.

The conditions of payment will be clear and accessible to pupils. All pupils (or their parents/carers) are required to sign a declaration confirming that they agree to these conditions.

Pupils in receipt of bursaries must have 85% of statutory attendance, unless the absence is authorised. Consideration will be given to the impact on attendance that might be caused by illness, caring responsibilities or other exceptional circumstances.

Where there are concerns regarding a pupil's attendance or behaviour, the school will discuss the issues with pupils (and parents/carers) and consider individual exceptional circumstances before withholding any payments. In all cases, sanctioning will not occur to the extent a pupil's ability to attend education is undermined.

The school will ensure that all parents/carers and pupils are aware of the possible impact that attendance may have on payments, outlined in the application form.

Pupils who do not meet the agreed conditions may have their payment withheld, but we will always take pupils' individual circumstances into consideration before doing so.

Where a pupil has withdrawn from Post 16 provision, payments will be stopped.

Money may be taken back from pupils where it is not spent for the reasons it was awarded. Before doing so, the school will always consider the impact on this on the pupil.

The school may specify that pupils return any equipment purchased for them through a bursary at the end of their Post 16 provision for use by other pupils. This will be clearly communicated to pupils and their parents/carers upon confirming eligibility for the bursary.

If we find evidence that a pupil or parent/carer has knowingly submitted misleading information or fraudulent information, resulting in the pupil receiving a bursary they were not entitled to, we will attempt to recover the overpayment from the applicant. Any instances of significant fraud will be reported to the DfE.

10.0 Change in Circumstances

If there are changes in circumstances that may affect eligibility for a bursary, applicants and/or parents/carers must notify the school without delay. Any change in circumstances that leads to incorrect/overpayment may result in future payments being stopped and any incorrectly paid funds being recovered.

11.0 Unspent Funds

Funding for bursary funding cannot be carried forward by the school for more than 1 year. Unspent funding must be reported to the DfE by the school using the customer help centre,

specifying the amount of funding and the year(s) it relates to, no later than 31 March each year. The DfE will recover all unspent funds.

12.0 Monitoring Arrangements

The Head of Service Finance is responsible for monitoring and reviewing this policy.

This policy will be reviewed **annually** approved by the Executive Leadership Team.

13.0 Complaints or Appeals

Where any pupil or parent/carers is unhappy with how we have managed their application for bursary funding or the support that has been provided, they are free to make a complaint or appeal as per Consortium Trust's Complaints Policy.

14.0 GDPR

Data and evidence provided in the 16-19 Bursary Application form is collected, used and retained in accordance with Consortium Trust's Privacy Notices. Data provided will be retained for 7 years, at which point it will be securely destroyed in accordance with the Trust's Record Retention Schedule.

If any of the data provided on the form (such as your email address, mobile number) or within the evidence provided (such as your bank account details) change, please advise the school.

Appendix A

16-19 Bursary Fund Application Form 2026-27

Please complete this form and return it via email to [bursaries.\(name of school\)@consortiumtrust.org.uk](mailto:bursaries.(name of school)@consortiumtrust.org.uk) together with your supporting evidence, for your application to be processed. Completed application forms should be returned by **30th September** to enable bursary awards to be assessed on a fair basis. However, we acknowledge that pupils' circumstances may change and therefore the application process will remain open for the whole school year.

Pupil details			
Surname			
Forenames			
Address			
Postcode			
Date of Birth			
If aged 19 or over, do you have an Education Health and Care Plan?			Yes No

Parent / Carer details – please provide the details of one parent / carer			
Full name			
Relationship to pupil			
Address			
Postcode			
Contact Details	Mobile		Email

Vulnerable Bursary criteria		
To qualify you must fall into one of the below categories and produce the required evidence as stated		
Care Leaver or currently looked after in care? (<i>evidence required - letter from Local Authority</i>) NOTE: Those who are privately fostered are not classed as in care	Yes	No
Are you in receipt of Income Support or Universal Credit because you are financially supporting yourself? (<i>evidence required - Income Support or Universal Credit Statement Letter</i>)	Yes	No
Disabled pupil in receipt of Disability Living Allowance (DLA) or Personal Independence Payments (PIP) PLUS either Employment Support Allowance (ESA) or Universal Credit (UC) (<i>evidence required - award letter showing in receipt of both ESA (UC) + DLA/PIP</i>)	Yes	No

Discretionary Bursary criteria

Your household income is one of the criteria which will help us assess your application. You may need the person responsible for the household bills to complete this section. If your **TOTAL** household income exceeds £43,000 per annum (excluding Disability Living Allowance and Child Benefit), you may not be eligible for a Bursary payment

If you or your siblings are in receipt of Free School Meals you do not need to provide further financial information in the section below – please proceed to Free School Meal Section

Number of dependent children in the household (deduction of £2,500 for each dependent child from eligible household income up to a maximum of 3 children)	
---	--

Pupil who lives in a household where annual household income is less than £33,000	Yes	No
---	-----	----

Pupil who lives in a household where annual household income is more than £33,001 but less than £43,000	Yes	No
---	-----	----

Please tick to indicate what type of evidence you have provided for the household members and ensure it is dated within the last 3 months where applicable. **If you cannot provide evidence then we cannot process your application for bursary payments.**

P60 (for last tax year)	
-------------------------	--

Wage slips for household (last 3 months)	
--	--

Self-employed earnings (tax return) (for last tax year)	
---	--

Income Support/Universal Credit (award letter)	
--	--

Full Tax Credit Award Notice	
------------------------------	--

Other benefits/pension (award letter)	
---------------------------------------	--

Free School Meals

Are you, or your sibling(s), in receipt of Free School Meals	Yes	No
--	-----	----

Additional information may be required to confirm eligibility if Free School Meals relates to a sibling only

Financial Assistance

The amount of financial assistance you will receive depends on your personal circumstances. It is intended to help you with the costs of overcoming any financial barriers you may have when attending learning. Using the table below, please tell us what you will need financial assistance. This information is strictly confidential and will only be used for this assessment purpose.

What do you need financial assistance for?	Tick	Provide details of what you require
Transport		
Books or equipment		
School lunches		
Educational visits		
Clothing		
Specialist equipment		
Any other assistance or exceptional circumstance		

Payment details

Please note that we usually pay Bursary awards 'in kind' e.g. by purchasing any equipment required or paying for transport. Any payments made directly are usually to a pupil's bank account by BACS. Where a pupil cannot manage their own funds, the school will consider who will manage the bursary on the pupil's behalf.

Declaration

All applicants must sign the declaration.

I declare that all the information given in this form is accurate and correct to the best of my knowledge.

I understand giving false or incomplete information that leads to incorrect/overpayment may result in future payments being stopped and any incorrectly paid funds being recovered. I understand the receipt of a Bursary is never guaranteed.

I will inform the school in writing of any changes or alteration to the information given. I understand that if there is any change to my financial circumstances my eligibility for financial support will be reviewed.

I understand that receipt of a bursary is conditional on meeting the agreed standards of behaviour set by the school and 85% statutory attendance and that any financial support I receive is to allow me to continue in education.

I understand that if I withdraw from Post 16 provision, financial support will cease.

Any equipment provided will remain the property of the school and will be returned in good condition at the end of the course.

I am aware that the funding covers only this school year and that I must re-apply next year.

Pupil Signature _____

Date _____

Applicant Signature _____

Date _____

Relationship to Pupil _____

Appendix B Bursary Fund Assessment Checklist 2026-27

FOR SCHOOL USE ONLY

Pupil details	
Surname	
Forenames	

Eligibility: all bursaries	
	Pupil meets the age criteria
	Eligible education provision
	Pupil meets the residency criteria for Post-16 provision
	Evidence of eligibility has been retained

Bursary for defined vulnerable groups	
	Pupil falls within one of the defined vulnerable groups for example, in receipt of the specified benefits in their own right or in care/care leaver
	Financial needs assessment carried out to confirm actual financial need and amount of support required. No pupil should automatically receive £1,200
	Appropriate evidence seen and copies retained to confirm pupil's eligibility.
	Support awarded in kind (for example, transport, books or equipment purchased on pupil's behalf). Receipts should be retained
	Award letter issued to pupil or parent/carer confirming the amount of financial support, what support will be made in-kind and payment conditions

Discretionary bursary	
	Evidence to confirm the pupil meets the bursary fund criteria, including household income and statement of actual participation costs
	Evidence of income and overall eligibility obtained, and copies retained
	Assessment of pupil's actual financial needs carried out. Block, blanket or flat rate payments are not permitted – the bursary award should reflect the actual costs the pupil has
	Support awarded in kind (for example, transport, books or equipment purchased on pupil's behalf). Receipts should be retained
	Award letter issued to pupil or parent/carer confirming the amount of financial support, what support will be made in-kind and payment conditions

Appendix C Assessment Form 2026-27

FOR SCHOOL USE ONLY

Pupil details	
Surname	
Forenames	

Review & Assessment – please indicate with a tick	
	Application Form and supporting information reviewed and either incomplete application or insufficient evidence provided to enable assessment to be undertaken Returned to applicant to provide further details
	Application Form and supporting information reviewed and sufficient evidence provided to enable assessment to be undertaken
	Assessment Checklist completed
	If Free School Meals, evidence of Local Authority eligibility check outcome retained on file

Eligibility – please indicate with a tick		
Vulnerable Bursary		Care leavers or young people who are looked after children
		Young people who receive income support/universal credit
		Disabled young people in receipt of both Employment Support Allowance and Disability Living Allowance/PIP
Discretionary Bursary		Young people facing financial barriers to participation in education

Summary of Assessment Details	
<i>Please provide a brief summary of assessment and details of assistance granted</i>	
Discretionary Bursary Assistance Requested	Assistance Granted – please detail
Transport	
Books or equipment	
School lunches	
Educational visits	
Clothing	
Specialist equipment	
Any other assistance or exceptional circumstance	

Signature _____

Date _____

Name _____

Position _____

To be signed by a member of the school Senior Leadership Team

Document Control

Changes History

Version	Date	Amended By	Details of Change
V1	February 2026	Tracy Rose, Head of Service Finance	Created new policy
V2	August 2026	Tracy Rose, Head of Service Finance	Annual review to reflect DfE Guidance 2026/27 and provide additional clarity

Approval

Name	Job Title	Signed	Date
Andrew Aalders-Dunthorne	CEO	Electronic signature	05/03/2026
Rhys Jarvis	Chair of Audit and Risk	Electronic signature	05/03/2026
Andrew Aalders-Dunthorne	CEO	Electronic signature	07/09/2026

This policy will be reviewed annually by the Head of Service Finance or as required by changes in legislation.

At every review, this policy will be approved by the Executive Leadership Team.

END OF DOCUMENT