



Bursary Fund Policy

Policy Owner	Deputy Chief Executive Officer
Review Frequency	Annual

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Rationale

This Policy document sets out the arrangements on how Connect Multi-Academy Trust will prioritise and administer the 16 to 19 Bursary Fund during the academic year.

The 16 to 19 Bursary Fund is designed to help support young people who face specific financial barriers to participation so they can remain in education.

Types of Award

There are two types of 16 to 19 bursaries awarded:

1. Bursaries for defined vulnerable groups up to £1,200 per year
2. Discretionary bursaries which institutions award to meet individual needs, for example help with the cost of transport, meals, books and equipment

Please see the 16 to 19 Bursary Fund guidance attached to this document for further details on the types of bursary available.

Both types of bursary funding are to help eligible students with essential costs of participating such as travel to and from school or to buy essential books, equipment or specialist clothing that are required for their individual study programme. These are items a student would otherwise need to pay for to participate.

The bursary fund is not intended to provide learning support- services for example counselling or mentoring or to support extra-curricular activities that are not essential to the students' study programme or to provide living costs support.

Eligibility Criteria

Both types of bursary funding are designed to help students overcome the individual financial barriers to participation they face. The Academy Trust will ensure funds go to those who genuinely need them. The Academy Trust will assess the actual needs of students, in addition to eligibility, when agreeing bursary funding. Awards will reflect evidenced participation costs and will not be made as flat-rate or fixed-rate payments where those payments do not reflect the actual costs faced by the student.

In setting and applying this policy, the Academy Trust will take account of the relevant local authority transport statement and any other support available to the student.

Eligibility for the bursary fund will be in accordance with the Department for Education 16 to 19 Bursary Fund Guide for both bursaries for defined vulnerable groups and

discretionary bursaries for the relevant academic year. The defined vulnerable groups are students who are:

- in care
- care leavers
- receiving Income Support or Universal Credit 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 or Personal Independence Payment in their own right and either Employment and Support Allowance or Universal Credit in their own right.

The managed move of legacy benefits claimants to Universal Credit means that new claims for legacy benefits have not been possible since 2018. This means young people who are aged 16 to 18 now will not be in receipt of those legacy benefits. However, students aged 19 to 25 and funded through the 16 to 19 budget may still be in receipt of legacy benefits.

The bursary for defined vulnerable groups can pay up to £1,200 per year to a student participating on a study programme that lasts for 30 weeks or more. Students on study programmes of less than 30 weeks are not likely to need as much financial support as those on longer programmes, and the Academy Trust will consider this in the assessment process. Students will only receive the amount they actually need to participate. The Academy Trust will not automatically award or claim £1,200 for each eligible student; funding will be based on assessed and evidenced actual costs.

A young person may be eligible for a bursary because they are in one of the defined vulnerable groups, but may not have any actual financial need. In such cases, the Academy Trust may decide not to make an award or may make a reduced award. The Academy Trust may provide support to a vulnerable group student of more than £1,200 if there is an assessed need to help them remain in education. Any payment over £1,200 must be paid from the discretionary bursary allocation or the Academy's own funds.

Evidence of Eligibility

The Academy must obtain the necessary evidence that students are eligible for the bursary they are claiming prior to making the award. This may be from individual students themselves or relevant institutions, for example a local authority in relation to

bursaries for defined vulnerable groups. The Academy will retain copies of student evidence of eligibility, assessment of actual need, award decisions and payment records for audit purposes. The evidence required for bursary fund applications will be in accordance with the Department for Education 16 to 19 Bursary Fund Guide for both bursaries for defined vulnerable groups and discretionary bursaries for the relevant academic year.

Please see the 16 to 19 Bursary Fund guidance attached to this document for details of the evidence necessary for proof of entitlement to all bursary awards for the current academic year.

Application Process

Students must complete the 16 to 19 Bursary Fund Application Form which is included in the Year 12 and Year 13 Enrolment Packs issued to students for completion at the start of the academic year. Further copies are available on the Academy website and from the 16+ Team. Students should complete the application forms in full, answering all questions relevant to them, and provide copies of the evidence required to prove eligibility and actual financial need. The completed application form and supporting evidence should be handed in to Sixth Form administrators.

The Academy will publish its 16 to 19 Bursary Fund policy or statement on the Academy website, including details of eligibility criteria, how students can apply, how awards will be assessed, and how payments or in-kind support will be made.

All applications will be considered by the Head of Sixth Form/16+ Progress Leader.

Payment of Bursaries

Bursary support may be provided either by BACS payment directly to the student or, where appropriate, through in-kind support such as travel passes, meal support, books, equipment, specialist clothing or other essential items linked to the student's assessed participation needs. Where BACS payments are made, it is necessary for students to have a basic bank account which allows BACS transfers and enables the student to withdraw money. Bursary payments are normally made on a half-termly basis unless an ad-hoc award is approved for payment at another point in the academic year.

1. Vulnerable Group Bursary payments are made at half-termly intervals, subject to assessed need and the student meeting the relevant conditions of payment.

2. Discretionary Bursary payments are also made at half-termly intervals, subject to assessed need and the student meeting the relevant conditions of payment.
3. Ad-hoc Discretionary Bursary payments are made on a one-off basis and can be made at any time within the academic year.

All awards and payments will remain subject to assessed and evidenced actual need, continued eligibility, available funding, and the student meeting the relevant conditions of payment.

Administration and Controls

The Academy Trust will maintain appropriate segregation of duties between the assessment or approval of bursary awards and the processing of payments.

Amount of Payment

1. The amount of the Vulnerable Group Bursary allocation will be in accordance with the amount set out in the Department for Education 16 to 19 Bursary Fund Guide. **Please see the 16 to 19 Bursary Fund guidance attached to this document for details of the amount for this academic year.** Students are informed in writing of the amount of payment and the date the payment will hit their bank account prior to each payment being made via a remittance advice.
2. The amount of Discretionary Bursary payments is set by the member of staff with leadership responsibility for the Sixth Form, on an annual basis and are dependent upon the total grant allocation received from the Department for Education; these will vary from year to year depending on the amount of grant received and the number of student applications received. **Please see the 16 to 19 Bursary Fund guidance attached to this document for details of bursary amounts for this academic year.**
3. The amount of an Ad-hoc Discretionary payment is dependent on the details of each individual application and is made at the discretion of the member of staff with leadership responsibility for the Sixth Form. Students are informed in writing of the amount of award and the date the payment will be available in their bank account prior to each payment being made.

Conditions of Payment

All bursary payments will be subject to satisfactory attendance, punctuality, behaviour and progress in line with the relevant academy policies. A student

awarded a Vulnerable Group or Discretionary Bursary will also be expected to fulfil the conditions of the Student Learning Agreement. **Payments may be withheld if these conditions are not met.** In this event, students are informed in writing of the reason that the relevant payment has been withheld.

Appeals

There is a right of appeal to the bursary application process. If a student, or their parent or carer, is not satisfied with the outcome of their bursary application, they should make an appeal in writing to the member of staff with leadership responsibility for the Sixth Form within 10 working days of receipt of notification stating fully their reasons for appeal. The responsible member of staff will call a Bursary Appeals Panel which will meet within 15 working days of receiving the appeal. It is the responsibility of the Bursary Appeals Panel to hear any appeals and to rule on the appropriateness of the original award decision, confirming or amending it as appropriate. The applicant will be informed of the panel's decision in writing within 10 working days of the date of Bursary Appeals Panel meeting. The Bursary Appeals Panel's decision is final.

The Bursary Appeal's Panel will comprise three senior members of Academy staff who were not involved in the original decision.

Managing Bursary Underspends and Recycling Vulnerable Bursary Payments

Any bursary underspends within an academic year will be rolled forward into the next academic year, and added to that year's discretionary bursary fund allocation. Any funds which are rolled forward will be spent before the allocated discretionary funds for new academic year. Any bursary underspends which are rolled forward to the next academic year will be spent in line with the Department for Education's Guide.

Impact Assessment

The policy will be evaluated and monitored for its impact on students, staff, parents and carers from the different groups within our Academy.

The 16 to 19 Bursary Fund guidance attached to this document will be updated on an annual basis, at the start of each academic year, in accordance with the Department for Education's 16 to 19 Bursary Fund Guide. The policy will be promoted

and implemented throughout the Academy, and any new staff will be briefed on the policy and procedures as part of their induction programme.

16 to 19 Bursary Fund

Guidance Document

for Academic Years

2026-27

This guidance document sets out the arrangements for how the Academy will prioritise and administer the 16 to 19 Bursary Fund for the academic year 2026–27. It is written in support of the full 16 to 19 Bursary Fund Policy.

Who is eligible to apply?

To be eligible to apply for the fund, students must:

- Be aged at least 16 and under 19 years of age on 31 August 2026, or meet the relevant 19+ eligibility criteria set out in the Department for Education guidance;
- Meet the residency requirements set out in the Department for Education guidance, verified before enrolment.

There are two types of bursary awards available:-

Bursaries for defined vulnerable groups

A **bursary for defined vulnerable groups** is available to learners who fall into one of the vulnerable groups identified below and who have an assessed financial need. Eligible learners may receive up to £1,200 a year, depending on their actual participation costs. This is paid half-termly **subject to the learner meeting attendance, learning and behaviour criteria and the conditions as set out in the 16+ Learning Agreement.**

The defined vulnerable groups are students who are:

- in care
- care leavers
- receiving Income Support or Universal Credit 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 or Personal Independence Payment in their own right and either Employment and Support Allowance or Universal Credit in their own right.

Please note that to qualify as eligible for a vulnerable student payment the young person does not have to live independently of their parents; they can claim ESA or UC in their own right. Parents should note that they will not be able to claim Child Benefit for them if the young person's claim for ESA succeeds.

Discretionary Bursary

The Academy will award bursaries to students who face genuine financial barriers to participate in education to help with costs such as transport, meals, books and equipment.

Before making an award, the Academy will consider the student's actual participation costs, the evidence provided, the relevant local authority transport statement, and whether those costs are already being met from another source.

The level of support which the Academy can offer is dependent on the total funding received from the ESFA (Education & Skills Funding Agency) and the numbers of applications it receives. We are unable to let students know how much they will receive until the application deadline has passed and all applications have been assessed.

The Academy will inform students by letter of the amount they have been allocated and the frequency with which support will be provided. Support may be provided directly into the bank account details provided or through appropriate in-kind support, depending on the student's assessed needs. Discretionary Bursary payments will normally be paid in half-termly instalments, subject to assessed need and available funding. Small one-off awards may be paid in full where this is appropriate to the student's assessed need. **Payments of Discretionary Bursaries are made subject to the**

learner meeting attendance, learning and behaviour criteria and the conditions as set out in the 16+ Learning Agreement.

There are two priority groups for the discretionary bursary:

Priority 1: Student is eligible for Free School Meals if the parent or carer receives any of the following:

- Universal Credit;
- Income Support;
- Income-based Jobseeker's Allowance;
- The Guarantee element of State Pension Credit;
- Income Related Employment and Support Allowance;
- Support under Part VI of the Immigration and Asylum Act 1999;
- Child Tax Credit (without Working Tax Credit except for the 4 week 'run on' period after becoming unemployed or a reduction in hours to less than 16 per week) and your annual family income does not exceed £16,190 and your child is under 19 and in full-time education.

Parents in receipt of Working Tax Credit do not qualify for free school meals. Appropriate evidence confirming eligibility will be required. Students do not need to be taking free school meals to qualify but need to be registered for free school meals.

Priority 2: Student is not eligible for Free School Meals but has a combined family income of less than £27,500 per year. Appropriate evidence confirming eligibility will be required.

Evidence of employment:

- Salaries and wages – P60, month 12 or week 53 payslip; and P9D or P11D if you have received benefits or payments in kind; and P45 if you had more than one employer in the relevant tax year;
- Self-employment income – SA302 form, Tax Credit award notification, or accountant's letter on headed paper.

Or benefits received:

Universal Credit, Income Support or income-based Employment and Support Allowance – the most recent benefit letter from HM Revenue & Customs or the Department for Work and Pensions detailing the amount of benefit received.

- Tax credits – Tax Credit Award notification from HM Revenue & Customs detailing the household income and your Tax Credit entitlement;

- DWP benefits – a statement of paid benefits from Jobcentre Plus or your social security office.

Application Process

1. Complete the 16 to 19 Bursary Fund application form answering all questions to avoid any delays in processing – forms can be downloaded from the Academy's website.
2. Attach the required proof (please send in photocopies and not the originals).
3. Submit application to Sixth Form Administrators.

Evidence

All applications to access the 16 to 19 Bursary Fund must be supported by appropriate evidence as detailed on the application form.

What happens next?

- The Bursary Panel will test the application against the eligibility criteria, check the evidence and assess the student's actual need for funding;
- The Academy will notify students in writing of the outcome of their application;
- Students awarded a bursary for defined vulnerable groups may receive payments or in-kind support each half term, subject to assessed and evidenced actual need, continued eligibility, available funding and **the learner meeting attendance, learning and behaviour criteria and the conditions as set out in the 16+ Learning Agreement;**
- Students awarded a Discretionary Bursary will be informed of the amount and may receive payments or in-kind support each half term, subject to assessed and evidenced actual need, continued eligibility, available funding and **the learner meeting attendance, learning and behaviour criteria and the conditions as set out in the 16+ Learning Agreement;**
- Students who receive an Ad-hoc Discretionary Bursary award will receive payment as agreed upon the production of relevant receipts/evidence.

Please note: Students will need to have their own current bank account and payments will be made directly to this account.

Appeals

There is a right of appeal. If any young person or their parent/carer are not satisfied with the outcome of their application, they should appeal in writing to the Head of Sixth Form within 10 working days stating fully their reasons why. The Head of Sixth Form will call a Bursary Appeals Panel within 15 working days of receiving the appeal. The

applicant will be informed of the panel's decision within 10 working days of that meeting. The panel's decision is final.

Important Notes

The fund will be distributed in a consistent and fair way and in accordance with guidance issued by the Department for Education. Where possible and appropriate, awards will be calculated using a formula. This process will be overseen by the Trust's Corporate Director of Finance.

The Academy will ensure that the assessment and approval of bursary awards is appropriately documented and that payment processing is subject to suitable segregation of duties or independent review. Records of eligibility checks, assessment of actual need, award decisions and payments or in-kind support will be retained for audit purposes.

Where, in the view of the Head of Sixth Form, special circumstances apply, the application will be assessed by the Bursary Awards Committee. The Committee can make non-standard awards where appropriate.

In cases where emergency help is required, support may be arranged by the Committee to reflect the immediate needs of the student.

The budget for the Bursary Fund is limited. Students who are eligible for support are not automatically entitled to an award. If demand exceeds the available funds, reduced awards may be given. All awards will be based on assessed and evidenced actual need.

In its administration of the Bursary Fund, the Academy will not discriminate against students on any basis as defined in current equalities legislation.

Students enrolled on a two-year course will need to re-apply for financial assistance at the beginning of the second year. Awards made in the second year may differ from first year awards.

Ad-hoc Discretionary Bursary Awards

Any student, regardless of household income, may be considered for an Ad-hoc Discretionary Bursary or emergency payments if they are experiencing financial difficulty due to a significant and unexpected change in personal circumstances during their time at the Academy.

The Academy will operate a contingency fund which will be used for one-off payments to help students who are experiencing exceptionally challenging circumstances, including support to attend university open days, interviews or similar education-related activities where these are essential to the student's programme or progression. Students will be required to complete a separate Ad-hoc Discretionary Bursary application form, which is available from the Head of Sixth Form.

Students may apply for Bursary support anytime during the year if their circumstances change.

Conditions of Bursary Payment

Bursary payments will be subject to satisfactory attendance, punctuality, behaviour and progress in line with the Academy's policies. A student awarded a bursary for defined vulnerable groups or a Discretionary Bursary will also be expected to fulfil the conditions of the NDA16+ Student Learning Agreement. Payments may be withheld if these conditions are not met.

Discretionary Bursary Panel

1. Finance Manager
2. Head of Sixth Form or person with lead responsibility for Sixth Form

Their responsibilities are:

- To agree and confirm the criteria and formula for making standard awards;
- To agree discretionary awards on an individual basis;
- To formulate the college policy and procedure for distributing the Bursary Award Fund.

Bursary Appeals Panel

1. Deputy Chief Executive Officer
2. Headteacher
3. Deputy Headteacher
4. Assistant Headteacher
5. Corporate Director

Their responsibilities are:

To hear any appeals and to rule on the appropriateness of the original award decision, confirming or amending it as appropriate.