Special Partnership Trust

16 – 19 BURSARY FUND POLICY

Date Reviewed: June 2026

Date due for review: June 2027

Contents

1. Aims

Our school aims to:

- Have clear and transparent processes for the use and allocation of 16 to 19 bursary funds
- Communicate clearly to parents / carers and students the type of support which is available and the means of applying for it
- Communicate clearly to parents / carers and students the attendance and behaviour conditions for receiving the funds

2. Guidance

This policy is based on advice from the Department for Education (DfE) on the [16 to 19 Bursary Fund guide: 2026 to 2027 - GOV.UK]

3. 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 and 17 who was previously looked after for a period of 13 weeks consecutively (or 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 prior to becoming 18 for a period of 13 weeks consecutively (or 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 governing board has overall responsibility for approving this 16 to 19 bursary fund policy, but can delegate this to a committee, an individual governor or the headteacher. The board has delegated responsibility for approving this policy to the Resources and Estates committee.

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

4.2 The headteacher

The headteacher is responsible for ensuring staff are familiar with this 16 to 19 bursary fund policy, and that it is being applied consistently.

4.3 Staff

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

The senior leadership team will provide staff with appropriate training in relation to this policy and its implementation.

4.4 Parents / Carers

Parents / Carers are expected to notify staff or the headteacher of any concerns or queries regarding this 16 to 19 bursary fund policy.

5. How we use the bursary fund

Financial support is available to eligible students from the 16 to 19 bursary fund. See section 6 below for details of our eligibility criteria.

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

There are two types of 16 to 19 bursaries:

- Bursaries for defined vulnerable groups; and
- Discretionary bursaries

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

- Transport
- Books
- Equipment or specialist clothing

The bursary is not intended to cover the whole cost of participation but provide a contribution.

6. Eligibility criteria for the 16 to 19 bursaries

6.1 Age

To be eligible for either bursary in the 2026 to 2027 academic year, students must be at least 16 years old but under 19 years old on 31 August 2026.

Students aged 19 or over are eligible only for a discretionary bursary if they:

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

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

6.2 Eligible education provision

Students must be participating in provision that is subject to inspection by a public body that assures quality (e.g. Ofsted). The provision must also fall into one of these groups:

- Be funded directly by DfE or by DfE via a local authority;
- Be otherwise publicly funded and lead to a qualification (up to and including level 3) that is accredited by Ofqual or is on the DfE's list of qualifications approved for funding 14 to 19; or

Students are not eligible if:

- They are on an apprenticeship programme; or
- Are on any waged training

Students who are studying via distance learning are eligible for either 16 to 19 bursary but are likely to require financial help on a more infrequent basis (e.g. travel to exams). If this is the case, we will provide support in-kind, such as a travel pass, details of which shall be decided on a case-by-case basis.

6.3 Residency

Students must meet the residency criteria in the DfE funding regulations for post-16 provision.

6.4 Asylum seekers

Accompanied asylum seekers 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;
- Are to be treated as ‘looked after’ children; and
- Are eligible for a bursary for vulnerable groups, where they have a financial need

When these students reach 18 years old, we will consider their immigration status. They will still be eligible for a bursary as a student 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.

6.5 Bursaries for young people in defined vulnerable groups

Students with a financial need, who meet one of the following 4 criteria below, in addition to the criteria outlined in sections 6.1, 6.2 and 6.3 above, can apply for a bursary for vulnerable groups.

The defined vulnerable groups are students who are:

- In care (NB: those who are privately fostered are not classed as looked after);
- 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; or
- 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

UC has now replaced IS, as well as other benefits above, for current and future young people aged 16 to 18. However, students aged 19 to 25 and funded from the 16 to 19 budget (19+ continuers and students with an EHC plan) may still receive the legacy benefits listed above.

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

Where a vulnerable bursary is provided, the funds will generally be up to £1,200 per year for study programmes lasting 30 weeks or more. When calculating the amount, cases will be looked at individually and base the outcome on a particular student’s needs. Students 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, and provide more than £1,200 per year if such would be necessary in all the circumstances for the student to remain in education. Any such additional payment will be paid from our discretionary bursary allocation.

If a student's study programme lasts for less than 30 weeks, they will be paid a pro-rata amount. We will also consider the number of hours involved in a student's study programme when deciding whether a pro-rata payment is more appropriate.

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

We will provide this support for students from the bursary fund by making payments in kind where possible. It will not be provided it as regular payments for living costs.

6.6 Discretionary bursaries

In addition to the criteria outlined in sections 6.1, 6.2 and 6.3 above, students can apply for a discretionary bursary if they satisfy one or more of the following criteria:

- Household income is below £30,000 per year, or the student or their family is in receipt of certain benefits.
- Students are in receipt of Free School Meals.
- Students 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 apply for a discretionary bursary.

In assessing any application for a discretionary bursary, we will consider:
- Level of household income
- The number of dependent children in the student's household
- The requirements of their study programme
- Transportation costs

We will check household income once at the beginning of the student's study programme with the Trust, this will apply to all schools within the Trust. Annually we will confirm eligibility by way of receipt of Free School Meals.

There is no set limit for the amount of discretionary bursary that can be awarded to students. We will base all decisions around which students receive a discretionary bursary, and how much bursary they receive, on each student's individual circumstances and their actual financial need.

The amount awarded will also depend on the funds available for distribution.

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

The school has the right to retain a proportion of the bursary they have received; however this can only be carried forward for one year. Any unspent funds after this must be reported to the DfE.

6.7 Evidence

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

- A copy of the IS or UC award notice, in the student's or parent's name;
- Document such as a child benefit receipt, birth certificate or utility bills;
- P60 or three months' payslips if P60 older than three months;
- Written confirmation of the student's current or previous looked-after status from the relevant local authority; and/or
- A copy of the UC claim from Department of Work and Pensions
- Confirmation from the relevant Local Authority of Free School Meals eligibility

7. Application and payment process

7.1 Applications for discretionary awards

Applications should be submitted by 10th October 2026 to allow enough time for the school 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 students' circumstances may change and therefore the application process will remain open for the whole school year.

7.2 Applications for defined vulnerable groups

Applications can be submitted to the school at any time, however windows for schools to submit applications to the DfE are termly and detailed in their guidance. Schools are only able to submit claims during those specified dates. The Trust will issue payment in advance of receiving the bursary from DfE as long as the individual clearly meets the criteria.

7.3 Notification of award

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 and how this will be paid.

If a parent or student wishes to appeal the outcome of their application for a bursary, they must follow the school's complaints procedure.

7.4 Payment process

Payments are made using the following process:

- In-kind payments, such as payments direct to supplier, travel passes, books, equipment or vouchers for meals
- Annual BACS transfer (in some cases a further payment may be made – this is not guaranteed)

Where a bursary is paid as money, the parent or student must submit receipts to the school for all related expenditure and purchases. If receipts are not provided the Trust reserves the right to request a repayment of the bursary.

7.5 Conditions for the receipt of bursary payments

Payments of the bursary are conditional on students meeting the following conditions in relation to their standards of attendance and behaviour:

- Attends school regularly
- Completes the work that is expected of them
- Abides by school rules
- Remains in school for the full length of their course

Students who fail to meet these conditions may have their payment withheld, but we will always take students' individual circumstances into consideration. This includes considering the impact on attendance that might be caused by illness, caring responsibilities or other exceptional circumstances.

We will stop payments where students have been absent for a period of 4 continuous weeks or more (excluding holidays) and where students have decided to withdraw from a study programme.

We reserve the right to take back money from students where it is not spent for the reasons it was awarded.

We will consider the impact of such an action on the individual student before taking a final decision to do so, and any decision will be confirmed to the student in writing.

8. Change in circumstances

If there are changes in circumstances which may affect eligibility for a bursary, applicants and/or parents / carers must notify the school without delay.

9. Record keeping

Any paperwork and documents we retain for audit purposes (for example, copies of application forms, documents as evidence and any agreements signed by students) will be kept securely in line with our data protection policy, privacy notices and record retention schedule accessible on the Trust website: Special Partnership Trust - Home.