

SCHOOL POLICY

16 –19 Bursary Fund Policy

Reviewed by:	Resources Committee
Signed (Governing Board):	
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Produced by Turton School

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Statement of intent

At Turton School, we are committed to closing the attainment gap between students from disadvantaged and more advantaged backgrounds, and ensuring that every young person participates in, and benefits from, a place in 16-19 education and training. The bursary is intended, therefore, to help eligible students with the essential costs of their studies, e.g., important books, equipment and travel costs.

We are dedicated to:

- Distributing 16-19 bursaries via a fair and equal process that is transparent, accountable and easily understood.
- Ensuring that information regarding the application, award and administration of 16-19 bursaries is publicly available via the school website and sixth form administrator.
- Widening access to, and participation in, 16-19 education and training.
- Monitoring and reviewing our policies to ensure effectiveness.
- Setting high targets and objectives to develop a culture of continuous improvement.
- Ensuring adequate resources are available to implement policies, as much as is reasonably practicable.
- Sharing and acquiring best practice through partnerships with neighbouring settings.

1. Legal framework

This policy has due regard to all relevant legislation and statutory guidance including, but not limited to, the following:

- DFE '16 to 19 bursary fund guide 2025 to 2026'
- DFE '16 to 19 funding: information for 2025 to 2026'
- Equality Act 2010

This policy operates in conjunction with the following school policies:

- Complaints Policy & Procedure
- Attendance Policy
- Behaviour Policy
- Data Protection Policy

2. The setting's responsibilities

The setting will be responsible for compiling the eligibility criteria for students and will set conditions for receiving the bursary, such as regular attendance.

The setting will ensure that arrangements for applying for bursaries will be straightforward and confidential.

The needs of each student who applies for the bursary will be assessed by the setting and evidence will be obtained to support each application. The setting will claim vulnerable bursaries directly from the DfE at defined points in the year.

Records will be kept by the setting of all assessments and payments. The application process will maintain confidentiality.

The setting will make this policy available early enough for students to be able to use the information when deciding which post-16 setting to attend.

The setting will comply with the requirements of the Equality Act 2010 when setting its criteria and will not discriminate against students because of their protected characteristics.

The setting will inform the DfE of the total amount of any unspent funds (not previously reported) from any year up to and including the 2023/2024 academic year, by completing the DfE [customer help portal](#) no later than 31 March each year.

The setting will not carry forward funding for more than one year and will return unspent funds from any year up to and including the academic year 2023 to 2024.

The setting will ensure it completes the census fields to provide data on the number of students participating in extended work placements.

The setting will complete school census, as appropriate, to report the number of students receiving support through the 16 to 19 Bursary Fund. This includes students in the defined vulnerable groups who are eligible for bursary support but do not require a financial award—commonly referred to as 'zero bursary' students.

The setting is aware of its key responsibilities and will:

- **Publish a clear Bursary Fund policy** on its website outlining how the fund will be used and the eligibility criteria applied.
- **Ensure all application forms, policies and guidance** clearly state that the Bursary Fund is intended to support students with their *actual* costs of participating in education, avoiding any misleading terminology, e.g., guaranteed bursary or automatic entitlement wording.
- **Base all bursary decisions** on each student's individual circumstances, carrying out a financial assessment to establish household income, actual financial need, and the costs involved.
- **Fully verify each student's eligibility** for a vulnerable groups bursary before submitting any funding claim to the DfE.
- **Consider providing support in-kind**, such as travel passes, books, learning resources, meals, or vouchers, where these best meet student needs.
- **Retain clear evidence** showing how bursary amounts have been determined and, for cash payments, maintain records demonstrating when and how payments were made.
- **Confirm students' eligibility each academic year**, requiring completion of a new application form signed by the student to reflect any changes in circumstances.
- **Retain signed documentation** showing students' formal agreement to bursary conditions, including expectations for attendance and the return of equipment purchased through the fund.
- **Ensure appropriate staffing arrangements**, including having more than one person able to process bursary applications, with segregation of duties or contingency planning in case of staff absence.

3. Raising awareness of the 16-19 bursary fund

To raise awareness of the bursary, the setting will employ different marketing activities, including the following:

- Posting information about the bursary on the school website
- Distributing information at open evenings for Year 11 pupils
- Providing students who attend a pre-enrolment interview with a brochure which includes information about the bursary and directs them to the setting's website
- Providing further information, such as the application form and details of the bursary, following enrolment for all new entrants to the setting in an enrolment pack, email about the bursary at the start of the academic year
- Providing tutors with information to inform discussions between tutors and students

The setting will ensure that, in any marketing materials and the application form, procedures for how the setting maintains confidentiality are outlined to encourage more students to apply for the bursary.

4. Eligibility

Students who are aged 16 or over and under 19 years old on 31 August before the academic year in question may qualify for bursaries for that academic year.

Students aged 19 or over will be able to receive a discretionary bursary if they are continuing a study programme, they began aged 16 to 18, or if they have an EHC plan, provided they remain eligible and the setting determines they need the support to continue their participation.

Students aged 19 or over will not be eligible for bursaries for vulnerable groups.

The setting will only pay bursaries to students aged 16 or over, unless in exceptional circumstances, e.g., where a student is following an accelerated study programme. The setting will use its discretion to decide whether a student under the age of 16 is eligible – this is explained further in the [‘Discretionary bursaries’](#) section.

Non-employed students aged 16-19 who are participating in a King’s Trust Team Programme will be eligible to receive the bursary in the same way as any other student participating in an eligible, publicly funded course.

Students will need to apply by [10th September](#) in order to be eligible. The school will, however, bear in mind that a student’s circumstances and needs may change later in the year and will therefore retain a small emergency fund for this purpose. For this reason, there will be no absolute cut-off point for applications.

Most students who receive a bursary will get a tailored award from the discretionary bursary. Students in need of more support will be permitted to apply for a vulnerable bursary.

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

- Funded directly by the DFE or by the DFE via an LA
- Otherwise publicly funded and leading up to a qualification (up to and including level 3) accredited by Ofqual or on the DFE list of qualifications approved for funding 14- to 19-year-olds

Residency

Students will need to meet the residency criteria in the DfE funding rules for post-16 provision in order to be eligible.

Asylum seekers

Asylum seekers are generally not eligible for public funds or cash bursary payments; however, in-kind support, e.g. travel passes, books, equipment, may be provided unless the student is an unaccompanied asylum-seeking child (UASC), who may receive a bursary for vulnerable groups if they have a financial need.

Young offenders

Students convicted or cautioned for a criminal offense, i.e. young offenders, will be able to apply for a bursary if they:

- Are serving a non-custodial sentence.
- Have been released early from a custodial sentence, except on temporary license.
- Have been remanded to a non-secure institution.

Young offenders cannot apply for a bursary if they:

- Are serving a custodial sentence.
- Have been released from a custodial sentence on temporary licence.
- Have been remanded to a secure institution.

As with all bursaries, the setting will provide in-kind support to young offenders rather than cash payments wherever possible.

5. Discretionary bursaries

The setting will ensure that discretionary funding is allocated to the students who are most in need of financial support. The setting's eligibility criteria for receiving a discretionary bursary will include:

- Student receives free school meals or where household income is below £26,000 (this may be subject to change).

Discretionary bursaries may be awarded for students in low-income households. The setting will use household income, in some way, to help establish the amount of support awarded to a student, if possible.

The amount awarded will be dependent on the amount of income – this will be allocated on different levels.

Students who apply will be assessed individually. This assessment will be documented, and evidence to support the claims will be obtained and retained for auditing purposes.

The assessment will be based on a student's financial needs.

The setting will not make blanket or flat-rate payments to all students or students in the income bands outlined above without considering the actual needs of each student.

The setting will use in-kind payments over cash payments for discretionary bursaries wherever possible.

The setting will manage the discretionary bursary to keep payments within budget. Where possible, the setting will retain a small emergency fund from its allocation to support students who face exceptional circumstances during the year due to a change in their situation that impacts on their ability to participate in education – evidence of a student's eligibility for emergency funds, the

individual assessment and their actual participation costs will be held for audit purposes as for any other bursary award.

In individual cases of severe hardship, the bursary fund will be used where appropriate to provide food support for a student on the days they attend their programme of study. Food support will be provided where the setting believes the student to be in real need and will not require checks on household income or other evidence-gathering that would usually be required.

Where food support is provided, copies of the following records will be retained for audit purposes:

- The total number of students provided food support
- The number of days this support is given to each student
- The total value of support given to each student along with the rationale for its provision

Each setting should exercise their discretion in each case as this scheme is not intended to continue on an ongoing basis for any individual pupil. This flexibility relates to food support only.

6. Vulnerable groups bursaries

The eligibility criteria for receiving a vulnerable bursary will include students who are:

- LAC (this includes those classed as an unaccompanied asylum-seeking child).
- Previously LAC (PLAC).
- Receiving Income Support or Universal Credit because they are financially supporting themselves and/or someone who is dependent on them and living with them, such as a child or a partner.
- Receiving Disability Living Allowance or Personal Independence Payments in their own right, as well as Employment and Support Allowance (ESA) or Universal Credit in their own right.

Proof will be required to evidence the above eligibility criteria for the bursary.

Students who are in one or more of these categories will be able to apply for a vulnerable bursary of up to £1,200.

Where a vulnerable student is on a course lasting 30 weeks or more and is participating full-time, they will be eligible to receive up to £1,200; students on study programmes of less than 30 weeks will receive a pro-rata amount. The setting will consider the number of hours involved in eligible students' study programmes when deciding if a pro-rata payment is more appropriate.

The setting may pay a student in a vulnerable group more than £1,200 if it believes the student needs extra help to remain in education; the extra payment will be paid from the setting's discretionary bursary allocation or its own funds. The rationale for such a decision will be included as part of the setting's auditable records.

The setting will only pay students the amount they need to access education, based on individual assessment. Students will not automatically receive £1,200 or a set amount of funding unless this is in line with their actual financial need. The setting will only submit a funding claim to the DfE once

sufficient evidence has been provided, and the setting has confirmed that the student needs financial support to participate.

The setting will be responsible for assessing whether students are eligible to receive a vulnerable bursary.

The setting may decide that, although a student may be eligible for a bursary, as they fall within one or more of the vulnerable groups, the bursary is not required as they do not have any financial need and do not need further support. If financial needs are already met and there are no other costs or they do not require the maximum award, the setting may decide not to allocate a bursary to the student.

Where the setting decides that a student is ineligible for funding in accordance with the above criteria, the setting will explain to the student and/or the student's parents the aim of bursary funding and why it is appropriate to not award any in this instance.

If a student or the student's parents still want to claim a bursary for vulnerable groups, they must inform the setting. The setting will then consider the particular circumstances in each case and assess whether:

- No bursary should be awarded, as the student has no financial needs; or
- A reduced bursary should be awarded, as the level of financial help needed is limited.

The setting will ensure its bursary application form is clear about the possibility of no award or a reduced award.

7. Paying bursary funding to eligible students

The setting will aim to pay all funding in-kind rather than cash as far as possible.

Payment in-kind may include, for example, travel passes, vouchers or credits for meals, or required books or equipment.

Where in-kind payments are given to students, the setting will explain the value of these payments and how these have been deducted from the total £1,200.

Where payments are made to students, rather than providing in-kind, the funding will be paid by BACS transfer to the student's own bank account. The value of the support and any terms and conditions will be made clear to the student in the confirmation letter given to them.

Payments will not be paid into another person's bank account unless exceptional circumstances mean that a student is unable to administer their own account. If a student cannot manage their own funds, the setting will consider who will manage the bursary on the student's behalf.

The setting has the right to determine how often payments are made – when doing so, the following will be considered:

- The reason the bursary was awarded
- The student's circumstances

- Local arrangements

The setting has the right to insist that students only spend bursary payments on the support that has been identified as necessary to help them access education, e.g. to pay for travel costs.

The setting will adhere to good practice guidelines to make regular payments to students on a weekly basis.

The setting will not pay bursaries to students in large or lump sums.

To decide how best to use individual students' bursary funding, the setting will employ the following procedures:

- Every student who qualifies for a bursary will have the opportunity to speak with a member of staff to discuss financial support required to support them with their studies
- Priority areas will be addressed first, including travel to the setting, equipment costs and support with studies
- Students will be allocated a higher amount of funding at the beginning of their course to address the priority areas
- A percentage of the funding will be kept back as a hardship fund to respond to any emergencies that may arise during the year – the total amount held is discussed with the student during the initial interview

If students or their parents have any queries about payments, they should contact their tutor in the first instance.

The setting may use up to 5 percent of its allocation from the DFE for administrative costs.

8. Conditions for receiving bursary funding

Receipt of a vulnerable or discretionary bursary will be conditional on the student meeting the agreed standards for attendance and behaviour as set by the setting.

The conditions of payment will be made clear and accessible to students, and thoroughly explained as part of the induction process.

Evidence that the student has seen and agreed to the conditions will be kept for audit, such as an agreement signed by the student, in accordance with the Declarations section. Receipt of the bursary is on condition that the student:

- Attends all subject lessons.
- Attends all tutorial/registration sessions.
- Follows the correct Notification of Absence Procedure, provided at induction.
- Adheres to the expectations detailed in the Student Sixth Form Agreement.

Where there are concerns regarding a student's attendance or behaviour, the setting will discuss the issue with the student and consider individual exceptional circumstances before withholding any

payments. In all cases, sanctioning will not occur to the extent that a student's ability to attend education is undermined.

The setting will ensure that all parents and students are aware of the possible impact that attendance may have on payments and outlined in the application form.

The setting will stop payments where a student is not meeting the agreed standards; however, individual circumstances will be considered before doing so.

Where a student withdraws themselves from a study programme, payments will be stopped.

Money may be taken back from students if it has not been spent for the reasons it was awarded to them. Before doing so, the setting will always consider the impact of this on the student.

The setting may specify that students return any books and equipment purchased for them through the bursary, such as a laptop, at the end of their study programme for use by other students. This will be clearly communicated to students and their parents upon confirming eligibility for the bursary.

The setting will require receipts for expenditure, where appropriate, to confirm that funding is being used for the reason it was awarded. For standard weekly costs, e.g. travel and food, receipts will not be collected for each transaction, and will instead be evidenced initially by receipts and then paid afterwards linked to attendance. Students may be asked at various points in the year to provide further receipts. For one-off or infrequent costs, receipts will always be collected. In all cases, students will not be asked to incur expenditure and provide a receipt prior to receiving funding – payment will be made first and a receipt provided afterwards, as necessary.

9. Managing applications

The setting will highlight to students and parents the impact of receipt of the 16-19 bursary fund on other benefits, e.g., it will not impact the receipt of income support or universal credit

The setting will use its own application form for the bursary fund.

The application form will capture all the relevant information needed to assess the application in line with this policy, including:

- Household income.
- The student's actual financial needs to support their participation.
- Specific deadline dates.
- The student's signature indicating they have seen and agreed to the terms and conditions of the funding and that all information provided is accurate.

All applications for the 16-19 bursary will be submitted by [10th September](#) of each year wherever possible, to allow the setting to correctly and fairly assess overall demand and distribute discretionary awards. The setting will not, however, implement a cut-off date for applications, in recognition that some needs may arise throughout the academic year.

The date for applications to be submitted will be outlined in the bursary application form and any marketing materials.

Application forms and marketing materials will outline that student who meet the criteria for bursaries for vulnerable groups are not automatically entitled to receive them, e.g., if they do not have any financial needs or these needs are covered by alternative means.

The setting will use the DfE's bursary fund checklist and summary to assess bursary applications and what to consider when administering the bursary fund.

Student declarations

Students and/or their parents will sign a declaration when they apply for either a vulnerable or discretionary bursary, confirming that any evidence given in support of the application is correct.

By signing the declaration, the student and their parents are agreeing to all the conditions and eligibility criteria.

The setting will retain copies of the declaration and supporting documentation for six years – this includes:

For vulnerable groups:

- A copy of the funding claim sent to DfE.
- Evidence showing that the student is eligible, in line with this policy.
- Evidence of payments received from the DFE, e.g. bank statements.
- A copy of the student's individual assessment of actual financial need, including a breakdown of the calculation that has determined the amount required.
- Evidence of payments made to the students.
- Receipts for purchases or in-kind support provided to the student, e.g. bus pass, lunch receipts or book receipts.
- Evidence to support the value of any BACS payments made to the student.
- Attendance evidence to support payments where applicable.

For discretionary bursaries:

- Evidence used to assess eligibility and household income, e.g. P60s, self-employment accounts, wage slips, a letter from DWP and copies of online statements for UC.
- A copy of the student's individual assessment of actual financial need, including a breakdown of the calculation that has determined the amount required.
- Receipts for purchases made or in-kind support provided, e.g. bus pass, lunch receipts or book receipts.
- Evidence to support the value of any BACS payments made to the student.
- Attendance evidence to support payments where applicable.

All data will be handled confidentially and stored securely in line with the Data Protection Policy.

10. Recycling bursaries

The setting will accrue some unused funding for bursaries for vulnerable groups during the academic year, e.g., if a student leaves early after only receiving part of their bursary, or if the full amount was not paid as the student did not meet the agreed conditions.

Where the setting has accrued funds as specified above, it will use these funds for another student, rather than claiming for the full amount.

If the setting has sufficient funds to cover the costs of a full bursary (£1,200), it will submit a funding claim showing a value of zero to the DfE and use the amount to fund the new student.

If the setting decides that a student is in one or more of the defined vulnerable groups, but does not have any actual financial need, it will submit a funding claim showing a zero amount.

The setting will be able to add any funding for bursaries for vulnerable groups it has claimed, but no longer needs, for eligible students for discretionary bursaries (from 1 May). Funds will be allocated in this way on a case-by-case basis after assessing students' needs.

The setting will consider carrying forward any unspent funds to the next academic year, but not for more than one year – any carried funds will only be used to support students in line with this policy and will not be added to general funds. Unspent funds carried forward will be used before using the setting's new academic year allocation.

If the setting has no other students who are eligible for a bursary for vulnerable groups and funds have been claimed in error, it will contact the DfE and arrange to return the funds.

11. Quality assurance, audit and fraud

The setting will use the DfE's '[16 to 19 Bursary Fund Checklist](#)' to confirm which documents have been provided for each student, as outlined in the student Declarations section – these relate to the following:

- The application process
- The decision to award the specified amount of bursary
- The funds that have been issued to the student

The setting will maintain written records of the following:

- The number of applications received
- The value of all bursaries awarded
- The purpose of all bursaries awarded
- Which applications qualified for the bursary, and which did not
- Brief descriptions of the setting's justification for any decision to award a bursary or not

The setting will retain copies of any documents the student has signed to give formal agreement to their conditions for payment, as well as any others mentioned in this section, for six years.

The setting will be responsible for investigating any suspected instances of fraud relating to bursary fund applications.

The setting will ensure that appropriate processes are in place to record bursary applications and expenditure at student level. This will include:

- A breakdown of the value, including the purpose, type of cost and whether paid or not.
- A brief justification for the decision.

The setting will ensure that it can clearly evidence the following:

- The application process
- How students were assessed as eligible
- How the decision has been made to award the specific amount of bursary based on financial needs
- The funds that have been issued to each student

Copies of documents signed by students to give formal agreement to their conditions for payment will be retained.

Students and their families will be informed that providing false or incomplete information that leads to incorrect payments or overpayment may result in a referral to the police with the possibility of the student and/or their family facing prosecution.

If evidence comes to light that supplied information is misleading or fraudulent, the setting will stop any further payments and will attempt to recover any payments already provided to the student.

Where significant fraud is identified, the setting will report this to the DFE. Significant fraud may involve one or more of the following:

- The amount of money is in excess of £1,200, unless exceptions apply
The particulars of the fraud are novel, unusual, systematic or complex
- There is likely to be great public interest due to the nature of the fraud or the people involved

12. Conditions for using the bursary

The bursary fund will not be used by the setting for any reasons which would give it a competitive advantage over other settings, such as:

- Fees for access to facilities in the setting.
- Block subsidy of the canteen.
- Block subsidy of transport.

- Block provision of equipment, material or books.
- Bonus payments to reward attendance or achievement.
- Payments to support students' general living costs.

The bursary will not be used as a way of incentivising attendance or as a marketing tool to encourage students to this this setting over another.

Block payments to students for attendance, irrespective of their actual financial need, will not be paid.

The bursary fund will only be used for supporting students who have a genuine financial difficulty which might prevent them from continuing in education, rather than acting as an incentive for attendance.

13. Complaints and appeals

If students disagree with the outcome of their application, or where payment has been withheld due to not meeting the outlined conditions, they should follow our complaints procedure, detailed in our Complaints Policy – this is available on our website.

14. Monitoring and review

This policy will be reviewed annually by the headteacher and the Governing Board.

The setting will ensure that this policy is always implemented correctly and appropriately.

The setting will communicate any changes to this policy to all staff and relevant stakeholders.