

16-19 Bursary Fund Policy

Owned by:	Michelle Woolley, Head of Finance
Approved by:	Amy Taylor, Chief Finance and Operations Officer
Last reviewed on:	September 2026
Next review due by:	September 2027



Version History

Version	Approved By	Revision Date	Description of Change	Author
1.0	Amy Taylor		Policy re-format	Michelle Woolley



1. Aims

This policy aims to:

- Ensure sound and effective financial management, as well as robust oversight, of the 16-19 Bursary Funding (the Bursary Funding/Fund) provided to Spencer Academies Trust (the/our Trust) by the Department for Education (DfE);
- Ensure that funds are expended for the purpose for which they are intended and that any remaining funds are held as an agency arrangement and not subsumed into general Trust funds;
- Provide a clear and accessible process for the use and allocation of the 16-19 Bursary Funding;
- Ensure parents/carers and students are clear on the types of support that are available through the fund and the means of applying for it;
- Ensure parents/carers and students are clear on the attendance and behaviour conditions attached to receiving funding.

2. Guidance and Definitions

This policy is based on guidance from the DfE: [16 to 19 Bursary Fund guide: 2026 to 2027 - GOV.UK](https://www.gov.uk/guidance/16-to-19-bursary-fund-guide-2026-to-2027).

It also takes account of the requirements of the [Academy trust handbook - GOV.UK](https://www.gov.uk/guidance/academy-trust-handbook) and complies with our funding agreements and articles of association.

- In care – children looked after by a Local Authority on a voluntary basis (section 20 of the Children Act 1989) or under a case order (section 31 of the Children Act 1989).
- Looked after child – 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 – a young person aged 16 or 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 and over who was looked after prior to becoming 18 for a period of 13 weeks consecutively (or a period amounting to 13 weeks) which began after the age of 14 and ended after the age of 16.

3. Roles and Responsibilities

The Board of Directors (the Board) is responsible for approving this policy but can delegate this to a committee, an individual Director or an appropriate member of the Trust Executive Leadership Team. The responsibility for approving this policy has been delegated to the Chief Finance and Operations Officer.

The Board also has overall responsibility for monitoring the implementation of this policy. Responsibility for monitoring the implementation of this policy has been delegated to the Head of Finance.

Academy Principals are responsible for ensuring staff are familiar with this policy and that it is being consistently applied. Academy Principals delegate the day-to-day management of the Bursary Fund to their Post 16 Leaders, supported by the Trust Director for Post 16 and Careers.

All staff are responsible for ensuring they operate in line with this policy and any supporting procedures.

Parents/carers are expected to notify staff of the Academy Principal of any concerns or queries regarding this policy or its application.



4. Purpose of the Bursary Fund

The Bursary Fund provides financial support to help students overcome the specific financial barriers to participation which they may face, to enable them to remain in education.

The funding award available to each student is dependent on their eligibility (and the individual personal circumstances around that eligibility) as well as the funding available to the academy which they attend, which is documented each year in the 16 to 19 allocation statement.

Bursary Funding is a separate payment to any free school meals funding for which the student may be eligible, this is applied directly through the relevant Local Authority.

There are two types of bursaries allowed using the 16-19 Bursary Fund:

- Bursaries for defined vulnerable groups
- Discretionary bursaries – set by our Trust in line with the funding provided.

■ We use the fund to provide students with support to fund essential items such as:

- Transport costs;
- Purchasing equipment or resources for individual students (books and educational equipment);
- Assistance with educational trips for the study programme (i.e. field trips)
- The costs of attending university interviews and open days;
- One off payments of additional costs that would otherwise prevent participation.

■ This award is not intended to provide learning support or to support extra-curricular activities where these are not essential to the study programme.

5. Eligibility Criteria

a) Age

Students must be at least 16 years old but under 19 years on 31 August 2026 to be eligible for financial support from the Bursary Fund in the 2026-27 academic year.

Students aged 19 and over are only eligible to receive a discretionary bursary if they:

- are continuing on a study programme or course that they began aged 16 to 18 years (19+ continuers); or
- have an Education, Health and Care (EHC) plan.

■ Students aged 19 and over are not eligible for bursaries for defined vulnerable groups. These students can receive a discretionary bursary while they continue to attend education (in the case of a 19 plus continuer, this must be the same programme they started before they turned 19), as long as their eligibility continues and their academy considers that they need the support to enable ongoing participation.

In exceptional circumstances, where students under 16 years old are on a funded 16 to 19 study programme at one of our academies, we may use our discretion to pay bursaries to these younger students. However, if these students are enrolled at another institution that receives public funding for them, they will not be eligible for bursary funding.

b) Education provision

Students must be studying a state-funded full-time course at one of our Trust academies.



c) Residency

Students must meet the government's residency criteria (as set out in [Advice: funding rules for 16 to 19 provision - GOV.UK](#)) to be considered for a bursary award.

d) Asylum seekers

Accompanied asylum seekers under the age of 18 (or asylum seekers over the age of 18) 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 through the Bursary Fund but we are not permitted to provide direct cash payments.

Unaccompanied asylum-seeking children are the responsibility of the Local Authority and are therefore to be treated as 'looked after' children and are therefore eligible for a bursary for defined vulnerable groups, where they have a financial need.

Bursaries for defined vulnerable groups

Up to £1,200 per academic year is available to students who are:

- in care;
- care leavers;
- receiving Income Support (IS), or Universal Credit (UC) because they are financially supporting themselves or financially supporting themselves and someone who is dependent on them and living with them, such as a child or partner;
- receiving Disability Living Allowance (DLA) or Personal Independence Payments (PIP) in addition to Employment and Support Allowance (ESA) or UC - all benefits must be received by the student, in their own right.

Students 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.

Universal Credit (UC) is replacing some benefits, for example, Income Support and Employment and Support Allowance for new claimants. This means students aged 16 to 18 from now on are not in receipt of these legacy benefits. However, students aged 19 to 25 but funded from the 16 to 19 budgets (such as those with an EHC plan) may still be in receipt of those legacy benefits. UC award notifications do not include information on the benefits they replace.

In order to be awarded the vulnerable groups bursary fund the Trust must submit a funding claim to the Student Bursary Support Service online portal once eligibility and financial need have been assessed and confirmed.

Discretionary bursary award

In addition to the eligibility criteria set out above, students can apply for a discretionary bursary if they satisfy the following additional criteria:

e) Household income

Our Trust invites applications from students who feel that they are experiencing financial barriers to participation and where they are in receipt of Free School Meals. However, students with a total household income below £25,000 will be prioritised.

Our Trust will assess the needs of each individual student following application to confirm the award available to that student.

Applications must be supported by appropriate evidence; examples of the required evidence are given on the application form.



6. Application and Payment Process

How to apply

- Check that the criteria set out within the policy applies to your circumstances;
- Complete the 19-19 Bursary Fund application form (or re-application form) which is available from your Sixth Form office
- Ensure all supporting information and documentation is provided alongside your application form;
- Submit the application to the Head of Sixth Form for your academy by no later than **30 September 2026.**

We acknowledge that students' circumstances may change and therefore the application process will remain open throughout the whole academic year to consider these changes.

Applications will be processed by the Trust within 28 days, during which time the applicant may be contacted for supplementary information or discussion around the needs identified.

Following assessment, formal notification of the outcome including award value will be provided to the applicant by the academy.

Appeals regarding Bursary Fund award can be made directly to the Trust Director for Post 16 and Careers (Susan Sharp: ssharp@spencertrsut.org.uk).

Payment of award

Payments will be made via BACs to an account in the student's name (and not a third party) on a termly basis. Some academies may choose to make smaller, more frequent payments. Payments will be made as stated in the award letter, throughout the academic year.

Where possible, payment will be made to students in-kind by buying items approved via the academy budget.

Conditions for receipt of award

- Ongoing payments are subject to the student continuing to meet the criteria for the award, and the attendance and behaviour expectations:
- Maintaining a positive attitude to learning (as agreed by the Head of Sixth Form);
- Not subject to any formal warning and/or exclusion;
- Achieving attendance in line with the expectations set with the Head of Sixth Form.
- Students are required to sign a declaration confirming that they agree to these conditions.

7. Record Keeping

Any paperwork and documents we retain for audit purposes (for example, copies of application forms, documents as evidence and any agreement signed by students) will be kept securely and in line with our Data Protection Policy, Privacy Notices and Record Retention schedule. Records should be retained for six years.



8. Monitoring arrangements

The Head of Finance monitors the implementation of this policy on behalf of the Board.

This policy will be reviewed and updated in line with most recent DfE guidance by the Head of Finance (and approved by the CFOO) on an annual basis.

9. Links with Other Policies

This policy links with the following Trust policies:

- Finance Policy
- Data Protection Policy
- Privacy Notices.

