Orchard Hill College Academy Trust

16-19 BURSARY FUND POLICY (ACADEMIES)

2026-27

Version:	2.6
Reviewer:	Suzanna Challenger
Approval body:	ESLT
Date this version approved:	17th July 2026
Due for review:	Summer 2027

16-19 Bursary Fund Policy (Academies)

INTRODUCTION

This policy sets out arrangements for how Orchard Hill College Academy Trust (OHCAT) will operate the 16-19 Bursary Fund across its academies for the academic year 2026-27. This policy is based on the Education and Skills Funding Agency's (ESFA) 16-19 bursary fund guide for 2026 to 2027.

WHAT IS THE 16-19 BURSARY FUND?

The 16 to 19 bursary fund provides financial support to help students 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

Both types of funding (discretionary and defined vulnerable groups) require the individual needs of students to be assessed. Flat and/or fixed rate payments that do not reflect need cannot be paid.

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 students the type of support that is available and how to apply for it
- Make clear to parents/carers and students the attendance and behaviour conditions for receiving the funds

This policy complies with our funding agreement and articles of association.

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

WHO IS ELIGIBLE TO APPLY?

Please note: the following eligibility criteria will be assessed **in addition** to the individual student's actual financial needs. This means:

- No student 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 student 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

Age

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

Students aged 19 or over are eligible only for a discretionary bursary (see 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

Students aged 19 or over are not eligible for bursaries for defined vulnerable groups. In exceptional circumstances, where students under 16 years old are on a funded 16 to 19 study programme at an OHCAT provision, the school may use its 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.

Students aged under 19 enrolled on higher education qualifications are not eligible for support from the 16-19 bursary fund.

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 the DfE, or by the 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

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

Students are not eligible if:

- They are on an apprenticeship programme
- They are participating in any waged training

Students who are studying via distance learning are not likely to require financial help from the bursary fund. If they do require financial help, the school will provide support in kind, such as a travel pass to attend exams. Details of this shall be decided on a case-by-case basis.

Residency

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

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.

The school 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 students reach 18 years old, the school 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.

HOW IS THE 16-19 BURSARY FUND ALLOCATED?

Discretionary Bursary

Discretionary Bursaries are awards made to students by the school to help young people overcome the individual financial barriers to participating in education, for example help with:

- travel
- educational visits
- books and equipment

- clothing
- specialist equipment
- emergency meal support
- other circumstances that prevent participation

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

- Level of household income
- Distance to travel between the student's home and the institution, or the location of a placement
- The number of dependent children in the student's household
- The requirements of their study programme
- Whether the student has additional responsibilities that may mean they need extra help

The allocation process for these funds is as follows:

- Students that apply will be assessed individually against the criteria and will be awarded a bursary fund based on their actual financial need
- Any unspent discretionary funding from the previous academic year will be prioritised for students based on their actual financial need in the current academic year
- Some funding will be held back for a contingency for students whose personal circumstances may change
- 5% of the discretionary fund will be held back to cover administrative costs

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.

Bursaries for young people in defined vulnerable groups

Students with a financial need, who meet one of the following four criteria below, in addition to the criteria outlined above, can apply for a bursary for vulnerable groups.

The defined vulnerable groups are students who are:

- In care (N.B. 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
- 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 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 (such as students with an EHC plan) may still receive the legacy benefits listed above.

Students 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.

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

Funding claims for the defined vulnerable group bursary must be submitted through a funding claim directly to DfE and based on an assessment of individual needs (this cannot be an automatic submission for £1,200). Students can be paid after the assessment is complete, and there is no need to wait for DfE payments.

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). Should an application be refused on this basis, the school will discuss this with the student 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 study programmes lasting 30 weeks or more. When calculating the amount, cases will be looked at individually and the outcome based 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.

Schools can use their 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 student 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.

If a student's study programme lasts for less than 30 weeks, this will be considered in the assessment for the bursary amount provided as they may not request as much financial support as those on longer programmes. The school will also consider the number of hours involved in a student's study programme when deciding the correct bursary amount to ensure it is appropriate.

Schools 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.

HOW TO APPLY

The Application Form for the 16-19 Bursary Fund Policy is at Appendix A. Applicants should complete this form and bring it to the school they attend.

Evidence of eligibility is required and must be included with the completed application form. 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 student's name
- Documents such as a tenancy agreement in the student's name, a child benefit receipt, birth certificate or utility bills

- Written confirmation of the student's current or previous looked-after status from the relevant local authority

Funding is not guaranteed by the acceptance of an application form. The school will notify students/families in writing of the outcome of their application.

Conditions for receipt of student bursaries

Receipt of both vulnerable student bursaries and discretionary bursaries is conditional on the student meeting attendance standards as defined by the school.

All students are required to sign a declaration confirming that they agree to these conditions.

Students who fail to meet these conditions may have their payment withheld, but OHCAT 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.

If students have received in-kind support such as equipment or travel cards, they will be asked to return these if they fail to meet the conditions.

Schools will stop payments where students have decided to withdraw from a study programme.

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

Schools 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.

Assessment and approval of applications

Each application with supporting documentation will be assessed in strictest confidence using the DfE checklist alongside the checklist at Appendix B and approval form at Appendix C.

Discretionary fund payments will be subject to review and approval by a representative of the school's Senior Leadership Team.

High value equipment

We may be able to help with the cost of high value equipment such as laptops, cameras and tablets where students require them to successfully complete their course. This will be dependent on the budget available. The equipment will remain the property of OHC&AT and should be returned once the course has been completed so it can be used by another student. To ensure this happens, all equipment will be kept at the Academy unless specifically agreed otherwise. See Appendix D: School Equipment for Student Use.

In special circumstances and at the discretion of the Academy Senior Leadership Team, some students may be allowed to retain their equipment at the end of the course, where a particular need has been identified.

PAYMENT

Please note that the school can choose to pay bursary awards 'in kind' e.g. by purchasing equipment required or may make payments directly into the student's bank account by BACs. The level of support which the school can offer under the Discretionary Bursary is dependent on the funding received from the ESFA and the number of applications received.

Cash payments will not be made in any circumstances.

Please note: Students will need to have a current bank account. If the payment is to be made payable to someone other than the student, proof of Power of Attorney must be provided.

RECORDING AND REPORTING

Secure records will be kept by School Business Managers of all bursary awards, receipts and payments for a period of six years. Records will include, but are not limited to:

- Copies of application forms and supporting evidence
- Proof that students meet eligibility criteria
- Records of 'zero bursary' students
- Details of assessment decisions and rationale for awards
- Records of all payments made to students, including dates, value and purpose
- Copies of documents signed by students to give formal agreement to the conditions of payment
- Evidence of student attendance and progress monitoring

An annual report on the number of bursary awards made and the total value will be produced by each school and submitted to the Trust Finance team for review.

Unspent funds

Funding for bursary funding cannot be carried forward by the school for more than one 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.

APPEALS

If a young person or their parent/carer are not satisfied with the outcome of their application, they should appeal in writing to the Principal of the school within 10

working days, stating the reasons why. The Principal will review the application within 15 working days of receiving the appeal.

The decision of the Principal is final and will be given in writing within 10 working days of their decision.

RELATED POLICIES AND DOCUMENTATION

OHC&AT Financial Regulations and annexes

APPENDIX A: 16-19 BURSARY FUND APPLICATION FORM 2026-27

Please complete this form and bring it, together with your supporting evidence, to the Academy you attend in order for your application to be processed.

Student details					
Title:		First name:		Surname:	
DOB:		Age: *(on 31st August 2025)*			
Address:					
Postcode:		Tel:		Email:	
Have you the right of abode and been resident in the UK for the last three years?				Yes	No
Do you have an Education Health and Care Plan?				Yes	No

Bursary criteria
To qualify you must: • meet the DfE's residency criteria • be aged 16 or over and under 19 on 31 August in the enrolling academic year or • aged 19 or over with an Education Health and Care Plan (EHCP) or • aged 19 or over and continuing on a study programme which began when aged 16-18

Vulnerable Bursary criteria		
To qualify you must fall into one of the below categories and produce the required evidence as stated.		
Are you in receipt of Income Support or Universal Credit? *(evidence required - Income Support or Universal Credit Statement Letter)*	Yes	No
Care Leaver or currently looked after in care? *(evidence required - letter from Local Authority)*	Yes	No
Disabled student in receipt of **both** Employment Support Allowance or Universal Credit and Disability Living Allowance/Personal Independence Payments *(evidence required, award letter showing in receipt of **both** ESA (UC) + DLA/PIP)*	Yes	No

Discretionary Bursary criteria					
Your household income is one of the criteria, which will help us to assess your application. If your **TOTAL** Household income exceeds £40,000 per annum, you will not be eligible for a Bursary payment.					
Please tick to indicate what type of evidence you have provided. If you cannot provide evidence then we cannot process your application for bursary payments.					
P60		Income Support/ Universal Credit (award letter)		Full Tax Credit Award Notice	
Self-employed earnings (tax return)		Other benefits/ pension (award letter)		Wage slips for household	

The amount of financial assistance you will receive is dependent 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?	**How much will you need?**
Travel	
Educational visits	
Books or equipment	
Clothing	
Specialist equipment	
Any other assistance or exceptional circumstance	

Payment details

Please note that the academy can choose to pay Bursary awards 'in kind' e.g. by purchasing equipment required or may make payments directly into the student's bank account by BACs. Please provide your bank details below as printed on your bankcard or statement.

Name of account holder	
Sort code	
Account number	
Name of bank or building society	

Declaration

I certify that the information I have given on this application form is true and accurate.
I understand that the information given on this form may be shared with other departments within the Academy including the Academy Trust finance team.
I understand that if I withdraw from the Academy I may be liable to pay back all or some of the monies awarded to me or the Academy on my behalf.

Print Name _____ Date _____

Signature _____ Relationship to student_____
(if applicable)

Power of Attorney

If you wish the payment to be made to someone other than the student you must provide proof that they are responsible for the student's finances such as Power of Attorney. This can include a letter from the Department of Work & Pensions.

Payment to be made to _____

APPENDIX B: ASSESSMENT CHECKLIST 2026-27

FOR SCHOOL USE ONLY

Eligibility: all bursaries

	Student meets the age criteria
	Eligible education provision
	Student meets the residency criteria for post-16 provision
	Evidence of eligibility has been retained

Bursary for defined vulnerable groups

	Student 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 student should automatically receive £1,200.**
	Appropriate evidence seen and copies retained to confirm student's eligibility.
	Support awarded in kind (for example, books or equipment purchased on student's behalf) or BACs payment made. Receipts should be retained.
	Award letter issued to student confirming the amount of financial support, what support will be made in-kind and payment conditions.

Discretionary bursary

	Evidence to confirm the student 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 student's actual financial needs carried out. **Block, blanket or flat rate payments are not permitted – the bursary award should reflect the actual costs the student has.**
	Support awarded in kind (for example, books or equipment purchased on student's behalf). Receipts should be retained.
	Award letter issued to student confirming the amount of financial support, what support will be made in-kind and payment conditions.

APPENDIX C: APPROVAL FORM 2026-27

FOR SCHOOL USE ONLY

Eligibility – please tick appropriate box (✓)

Vulnerable Bursary		Young people who receive income support/universal credit. Care leavers or young people who are looked after children. 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.

16-19 Discretionary Bursary Fund Assistance Requested	**Assistance Granted ✓**
Travel	
Educational visits	
Clothing	
Books or equipment	
Any other assistance or exceptional circumstance	

SIGNED: **DATE:**

NAME: **POSITION:**

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

APPENDIX D: SCHOOL EQUIPMENT FOR STUDENT USE

FOR SCHOOL USE ONLY

Student Name:
Equipment Provided:
Make:
Serial number:
Asset Tag Number:

Conditions of school equipment being provided for student use
All equipment supplied to the pupil/student remains the property of the school.
Equipment must be returned to the school on request.
The equipment supplied is for the purpose of supporting the named student with their school work only. The equipment must not be passed onto a third party.
If there is any damage to the equipment the school must be notified immediately.

By signing this form

- I agree I have received the equipment listed above
- I agree to the above conditions of the school equipment being provided
- I agree to abide by the school's acceptable use of IT policy

Signed:
Print name:
Date equipment issued:
Signed by school representative:
Date equipment returned to school: