APPENDIX 13

16-19 Bursary Fund Policy

This policy was approved and ratified by the

Leadership Team of

Cox Green School

In September 2025

Version	Authorisation	Approval Date	Effective Date	Next Review
1	Full Governing Body	03/12/13	03/12/13	Sept 2015
1.1	Full Governing Body	20/10/15	20/10/15	Sept 2017
1.2	Updated for 2016-17 Ac year			Sept 2016
1.3	Updated for 2017–18 Ac year			Sept 2017
1.4	Finance & Resources Committee	10/10/17	10/10/17	Sept 2018
1.5	Updated for 2018–19 Ac year	09/10/18	09/10/18	Sept 2019
1.6	Updated for 2019–20 Ac year	08/10/19	08/10/19	Sept 2020
1.7	Updated for 2020-21 Ac Year	06/10/20	06/10/20	Sept 2021
1.8	Updated for 2021-22 Ac Year	13/10/21	13/10/21	Sept 2022
1.9	LT - updated for 2022-23 Ac Year	1/11/22	1/11/22	Sept 2023
1.10	LT - updated for 2023-24 Ac Year	Oct 23	Oct 23	Sept 2024
1.11	LT - updated for 2024-25 Ac Year	Sep 24	Sep 24	Sept 2025
1.12	LT - updated for 2025-26 Ac Year	Sep 25	Sep 25	Sept 2026

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Background

This policy sets out arrangements for how Cox Green School will operate the 16-19 Bursary Fund for the academic year 2025-26. This policy is based on the Education and Skills Funding Agency's (ESFA) guidance for the 16 to 19 Bursary Fund 2025 to 2026 academic year.

The 16-19 Bursary Fund is a scheme set up by the Department for Education (DfE) and funded by the ESFA. The Fund provides financial support to eligible students to help overcome their specific financial barriers to participation so they can remain in education and training.

The contact at the school for all 16-19 Bursary support/enquiries is the Sixth Form Mentor.

General Eligibility

To be eligible to receive a Bursary, a student must be aged 16 or over but under 19 on 31/08/25 and meet the ESFA residency requirements as set out in document **16 to 19 Bursary Fund guide: 2025 to 2026 academic year.** This document sets out the evidence that is required to confirm eligibility.

Bursaries Available

There are two types of Bursary available:

Level 1 - Vulnerable Bursary

A Vulnerable Bursary of **up to £1,200** is available to all students who are identified as being:

- Currently in care or care leavers (previously looked after for a period of at least 13 weeks since the age of 14);
- In receipt of 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 (DLA) or Personal Independence Payments in their own right, as well as Employment and Support Allowance (ESA) or Universal Credit in their own right.

Evidence of Eligibility:

- Written confirmation from the Local Authority confirming the student's current or previous looked after status;
- For students in receipt of Income Support or Universal Credit (UC), a copy of their Income Support or UC award notice. This must clearly state that the claim is in their name/confirm they are entitled to the benefits in their own right, and that they can be in further education or training. They must also provide additional documentation to confirm their independent status, such as a tenancy agreement in the student's name, a child benefit receipt, children's birth certificates or utility bills;
- For students receiving UC/ESA, Disability Living Allowance (DLA) and Personal Independence Payments (PIP) – a copy of the student's UC claim from DWP, evidence of receipt of DLA or PIP must also be provided.

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Discretionary Bursary

Discretionary Bursaries are awards made to students to help overcome the individual financial barriers to participating in education, for example, to provide financial support towards:

- Travel;
- Book and school equipment;
- School meals;
- Educational Visits, University visits;
- Clothing;
- Specialist equipment;
- Other circumstances that prevent participation.

Please note that the school may choose to pay Bursary awards "in kind" e.g. by purchasing textbooks, school meal vouchers, travel passes or equipment or may make payments directly into the student's bank account by BACS, in which case receipts will need to be provided.

The allocation process for these funds is as follows:

- Students who apply will be assessed individually against the criteria and will be awarded a bursary fund based on their actual financial need;
- 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.

Level 2 - Discretionary Bursary

A Discretionary Bursary of up to **£600** is available, subject to the availability of funds, to all students in the following circumstances:

- Where the student, or a sibling, qualifies for Free School Meals (FSM);
- Their **gross** annual household income, as assessed by HM Revenue & Customs, does not exceed **£30,000;**
- Wider family circumstances e.g. single-parent family, student carer, number of dependent children in household, travel distance to school.

Evidence

Acceptable supporting evidence for the **Level 2 Discretionary Bursaries** will be either:

- Three most recent Universal Credit monthly award statements;
- P60 End of Year Certificate for all adults in the household, for the Tax Year to 5 April 2025.
- Three most recent wage slips for all adults in the household;
- If self-employed, a copy of your SA302 form or Tax Credit Award or Accountant's letter on headed paper;
- Confirmation from our FSM checking system that the applicant or a sibling is entitled to Free School Meals;
- Other most recent **benefits/pension award letter**

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Contingency Eligibility/Exceptional Circumstances

Subject to the availability of funds, any student meeting general eligibility requirements and facing financial hardship due to an exceptional reason or circumstance change can apply to access the contingency funds on an individual basis by submitting an application in writing. Any applications will be considered by the 16-19 Bursary Application Panel, having taken guidance from the school's SAFE Team.

Also subject to the availability of funds, a top-up discretionary bursary may be awarded.

Qualifying Condition Requirements

Eligible students will need to complete a qualifying learning period of 6 weeks before they are able to receive Bursary payments. However, any eligible student can make an application ahead of the six-week qualifying period, and in the case of extreme hardship, consideration will also be given for payment in advance of the six-week period.

All students in receipt of a Bursary must meet the terms of the Sixth Form Code of Conduct to ensure continued support. In addition, all students in receipt of a Bursary must behave appropriately and submit work of an appropriate level and to the required deadlines. If the student does not meet these conditions, the school reserves the right to withdraw or suspend Bursary payments.

Payments

The school may choose to pay Bursary payments “in kind” e.g. by purchasing textbooks, school meal vouchers, travel passes or equipment or may make payments directly into the student’s bank account by BACS, in which case receipts will need to be provided. Payments will be made via BACS to a Bank Account in the name of the student. The student must have a valid account in their name unless there are exceptional reasons, which means an appointee has been named to manage the affairs of the student.

Payments by BACS will be made on the last Friday of every month, and any receipts for items to be reimbursed should be submitted in plenty of time to be processed by the Sixth Form Mentor and approved by the Achievement Leader for KS5.

Application

Applications for a Bursary must be made using the correct Application Form and should be submitted in full **as soon as possible**. However, once the Bursary Fund has been used, it will not be possible to consider further applications.

Consideration must be given to assisting any student to make an application where they are unable to do so due to a level of learning difficulty and/or disability.

Consideration must also be given to assisting any student in making an application where they are not able to provide supporting evidence due to difficulties with engagement or support from their parent/guardian/carer(s).

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Process

All applications for a Bursary or to access the contingency fund will be assessed by a 16-19 Bursary Application Panel consisting of:

- **Sixth Form Mentor**
- **Associate Senior Leader for Sixth Form/Director of Sports Academy**
- **Deputy Headteacher – Pastoral & Community**

The Panel will review the application, supporting evidence and any other personal circumstantial evidence, and students will be notified of the outcome within **two weeks** of receipt.

Appeals

If any student or their parent/guardian/carer(s) are not satisfied with the outcome of their application, they should write to the Headteacher outlining their reasons why. The Headteacher will convene a 16-19 Bursary Appeals Panel consisting of:

- **Headteacher**
- **Appointed Trustee**

The Panel will consider and respond to appeals within **two weeks** of receipt. If the appeal is upheld or partly upheld, it will be referred back to the 16-19 Bursary Application Panel with recommendations. If the appeal is not upheld, the appealing party will be signposted to the school's Complaints Procedure.

Confidentiality

Applications and supporting evidence will be confidential to the 16-19 Bursary Application Panel and, in the event of an appeal, the 16-19 Bursary Appeals Panel. The applications and supporting evidence will remain confidential during processing, payment and storage. If it is necessary to obtain additional information to reach a decision, the student and/or their parent/guardian/carer(s) will be told the reasons why this is necessary prior to sharing any information further.

Change of Student's Financial Circumstances

Any student in receipt of a Bursary has a duty to inform the school should their financial circumstances change, or those of their parent/guardian/carer(s) change (e.g. increase in household income that would affect the student's entitlement to Free School Meals). This does not automatically mean any future Bursary payments will be stopped but would result in a convening of the 16-19 Bursary Application Panel to determine whether the payments continue or be stopped and the funds redistributed.

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Appendix A - Information for parent/guardian/carer(s)
Appendix B - Application Form
Appendix C - Assessment Checklist
Appendix D – Example of a Universal Credit Statement

Appendix A: Information for Parent/Guardian/Carer(s)

1. **What is the 16-19 Bursary Fund**

The 16-19 Bursary Fund is a scheme set up by the Department for Education (DfE) and funded by the ESFA. The Fund provides financial support to eligible students to help overcome their specific financial barriers to participation so they can remain in education and training.

2. **What is it for?**

The 16-19 Bursary is a limited fund made available for supporting eligible students with the costs of transport, food, books, educational visits or other course materials or equipment essential to successfully completing their programme of study.

3. **Who is it for?**

The 16-19 Bursary is targeted towards those students considered most in need of financial support. The Government has identified a priority group of students and has asked that Schools give priority to this group first and offer them a **Vulnerable Bursary**.

After this group has been considered, the school expect to have a small amount of funding available for other students in need of financial support. The school has set **eligibility criteria** to ensure the remaining funds go to those who are seen to need it most. Any student who meets these eligibility criteria can apply for a **Discretionary Bursary**.

4. **What are the eligibility criteria?**

Students can apply for a Bursary if they are aged 16 or over but under 19 on 31st August 2025, meet the national residency requirements and at least one of the criteria listed below.

Level 1 Bursary - They can apply for a **Vulnerable Bursary** if they are:

- Currently in care or care leavers (previously looked after for a period of at least 13 weeks since the age of 14);
- In receipt of 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 (DLA) or Personal Independence Payments in their own right, as well as Employment and Support Allowance (ESA) or Universal Credit in their own right.

Level 2 Bursary - They can apply for a **Discretionary Bursary** if either:

- Your gross annual household income, as assessed by HM Revenue & Customs, does not exceed £30,000; and/or
- They, or a sibling, qualify for Free School Meals (FSM); and/or;
- Wider family circumstances e.g. single-parent family, student carer, number of dependent children in household.

5. **Can they still apply if they don’t meet the eligibility criteria?**

Yes, providing they meet the age and residency eligibility criteria. The school is keeping back some of the available 16-19 Bursary Fund for exceptional circumstances for one-off payments or additional support.

6. **How and when do they apply?**

To apply, they must complete the **16-19 Bursary Fund Application Form** and submit this to the Sixth Form Mentor with the correct **supporting evidence.**

For those students already in receipt of the Bursary, supporting documents will need to be supplied each year in order for the Bursary to be continued.

7. **How much is the Bursary?**

The **Level 1 Vulnerable Bursary** is up to £1,200, and the **Level 2 Discretionary Bursary** is up to £600. The exact amount is dependent on individual circumstances, and an assessment of the financial needs of each applicant will be carried out. The bursary award will reflect the actual costs the student has and the funds available.

If funds are available, a second discretionary top-up to the bursary may be awarded.

8. **Will the Bursary affect any benefits I may be receiving?**

No, it will not affect any benefits or financial support you are receiving from elsewhere.

9. **How and when does it get paid?**

The school may choose to pay Bursary payments "in kind" e.g. by purchasing textbooks, school meal vouchers, travel passes or equipment or may make payments directly into the student's bank account by BACS, in which case receipts will need to be provided. Payments will be made via BACS to a Bank Account in the name of the student. The student must have a valid account in their name unless there are exceptional reasons, which means an appointee has been named to manage the affairs of the student.

Payments by BACS will be made on the last Friday of every month, and any receipts for items to be reimbursed should be submitted in plenty of time to be processed by the Sixth Form Mentor and approved by the Achievement Leader for KS5.

10. **How do I find out more?**

If you wish to make an application, please request a full application pack from the Sixth Form Office, which can be contacted on 01628 629415. The application pack will contain the **16-19 Bursary Fund Policy,** which provides further information, including details on eligibility criteria and **supporting evidence** needed. Alternatively, you can talk in confidence to the Sixth Form Mentor if you need help making an application.

Cox Green School
16-19 Bursary Fund Application 2025/26

Appendix B: Application Form

<u>Student Details</u>

Surname	
Forenames	
Address	
Postcode	
Date of Birth	

<u>Level Applies for</u> - Please tick which level of payment you are applying for:

Level 1 – Identified vulnerable students eligible for £1,200 bursary	
I am a student in care/care leaver (previously looked after for 13 weeks since the age of 14)	
I am in receipt of Income Support or Universal Credit	
I am in receipt of both Disability Living Allowance or Personal Independence Payments and Employment Support Allowance or Universal Credit	

Level 2 – Identified students eligible for a discretionary bursary of up to £600	
I am eligible or a sibling is eligible for Free School Meals	
My total gross household income is less than £30,000	

<u>Household Income</u> *(Required for Level 2 applications)*

Please include the required **<u>original</u>** supporting documentation with this form. All evidence will be photocopied and dealt with the strictest confidence. (*Please do not send any original documentation in the post. The students should bring this directly to the Sixth Form Mentor in the Sixth Form Office, who will photocopy and return ASAP).*

My total household income is:	£

Cox Green School
16-19 Bursary Fund Application 2025/26

Please tick the supporting documentation provided

3 most recent Universal Credit monthly award statements	
P60 (*tax year ended 5th April 2025*)	
Last 3 months' Payslips for all household adults	
Evidence of self-employment income (*tax year ended 5th April 2025*) or an Accountant's letter	
Confirmation from our FSM checking system that the applicant or sibling is eligible	
Other benefits/pension award letter	

Discretionary Bursaries are awards made to students to help overcome the individual financial barriers to participating in education, for example, to provide financial support towards:

What do you need financial assistance for?	**How much will you need?**
Travel	£
Books or school equipment	£
School meal vouchers	£
Educational/University Visits	£
Clothing	£
Specialist equipment	£
Other: pls specify	£
Total Bursary Amount agreed	**£**

Please note that the school may choose to pay Bursary awards “in kind” e.g. by purchasing textbooks, school meal passes, travel passes or equipment or may make payments directly into the student’s bank account by BACS, in which case receipts will need to be provided.

Cox Green School
16-19 Bursary Fund Application 2025/26

Payment Details

Please note that the school may choose to pay Bursary awards "in kind" e.g. by purchasing textbooks, school meal passes, travel passes or equipment or may make payments directly into the student's bank account by BACS, in which case receipts will need to be provided.

Please complete the bank account details required.

Student Bank or Building Society details

Full name of Account Holder *(This should be as it appears on your cash or debit card, or statement)*	
Name of Bank/Building Society	
Branch	
Sort Code	___ ___ -- ___ ___ -- ___ ___
Account Number	___ ___ ___ ___ ___ ___ ___ ___

Your account number may not be the same as the cash or debit card number; you can find it on a bank or building society statement. Most account numbers are 8 digits long. If you are unsure, your bank or building society can advise you.

Parent/Carer 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 school, including the Finance Department.

I understand that if I withdraw from the school, I may be liable to pay back all or some of the monies awarded to me.

Print Name	
Signature	

Date	
Relationship to student	

Cox Green School
16-19 Bursary Fund Application 2025/26

Appendix C: Assessment Checklist 2025-26 - FOR OFFICE 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, bus pass, meal vouchers or equipment purchased on student's behalf) or BACS payment made. Receipts must 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, bus pass, meal vouchers or equipment purchased on student's behalf) or BACS payment made. Receipts must be retained.

☐ Award letter issued to student confirming the amount of financial support, what support will be made in-kind and payment conditions

Sixth Form Office use only	
Date application received	
Date application reviewed	
Level / Amount of Bursary agreed	Level_____ Amount_£__________
Achievement Leader KS5 Signature	

Appendix D: Example of Universal Credit monthly award notice:

GOV.UK Universal Credit *'Your Name'* : Sign out

Payments

'Your Name'

'Your Address'

Assessment period: 29 July to 28 August 2024
[Need help understanding your assessment period?]

Your payment this month was

£2,161

This was paid on 4 September 2024

What you're entitled to

Standard allowance £393.45
You get a standard amount each month. You said you're in a couple

Housing £1,450.00
Need help understanding your housing?
You said per month the total rent for your property is £1,600.00.

You will have to pay your housing costs to your landlord.

Monthly, we can pay you £1,450.00 towards your housing costs. We cannot pay the full amount you told us about because:

we cannot pay more than the Local Housing Allowance rate -£150.00

Children £621.25
You get support for 2 of your 3 children

Total entitlement before deductions	**£2,464.70**

What we take off (deductions)

Take-home pay - £303.23
Need help understanding take-home pay?
Take-home pay is what's left after tax, National Insurance and any pension contributions have been deducted.

'Your Name'

The amount we'll use to work out your Universal Credit is £0.00

Your Name

Earnings reported by your employer	£955.32

The amount we'll use to work out your Universal Credit is £955.32

> The total take-home pay for *'Your Name'* this period is **£955.32**

The first £404.00 of your take-home pay doesn't affect your Universal Credit monthly amount. Every £1.00 you earn in take-home pay over this amount reduces your Universal Credit by 55 pence.

Money, savings and investments - £0.00

We have taken £0.00 off your Universal Credit payment because you have money, savings and investments of £800.00.

You must tell us if this changes so that we can pay you the correct amount on time.

The first £6,000 of your money, savings and investments does not affect your payment. If you have over £6,000 up to £16,000, every £250 reduces your Universal Credit by £4.35. For any remaining amount that is not a complete £250, a further £4.35 is also deducted.

Total deductions	**- £303.23**
Your total payment for this month is	**£2,161.47**

If your circumstances change

You must immediately that could affect your Universal Credit payments.

Help and support

The 'Managing your claim guide' gives more information about Universal Credit payments.

If you think we've made a mistake or want to appeal

Other support you may be able to get