



# 16-19 Bursary Policy

<b>Policy Code:</b>	Ed13
<b>Policy Start Date:</b>	Spring 2026
<b>Policy Review Date:</b>	Spring 2027

## **1. Policy Statement**

Community Inclusive Trust is committed to removing financial barriers that prevent young people from accessing, participating in, and completing post-16 education.

The 16–19 Bursary Fund, provided by the Department for Education (DfE), supports eligible students facing financial hardship so they can engage fully in their study programme.

This policy sets out how Community Inclusive Trust administers the 16–19 Bursary Fund in line with current DfE guidance, ensuring fairness, transparency, and accountability.

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## **2. Legislative and Guidance Framework**

This policy complies with:

- Department for Education: *16–19 Bursary Fund guidance for the academic year*
  - Education Funding Agency (ESFA) funding conditions
  - UK General Data Protection Regulation (UK GDPR)
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## **3. Scope**

This policy applies to all eligible students who:

- Are aged 16–19 on 31 August of the relevant academic year, or
  - Are aged 19–25 and have an Education, Health and Care Plan (EHCP), and
  - Are enrolled on an eligible study programme at a Community Inclusive Trust school or academy.
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## **4. Types of Bursary Available**

### **4.1 Vulnerable Student Bursary (Up to £1,200 per annum)**

Students are automatically eligible if they meet one or more of the following criteria and provide evidence:

- In care or a care leaver
- In receipt of Income Support in their own right
- In receipt of Universal Credit in their own right
- In receipt of Employment and Support Allowance (ESA) **and** Universal Credit in their own right

Eligible students receiving the vulnerable bursary may receive up to £1,200 per year, paid in instalments and subject to attendance and engagement conditions.

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### **4.2 Discretionary Bursary**

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The discretionary bursary supports students who do not meet the vulnerable criteria but face genuine financial hardship.

Awards are based on **household income**, personal circumstances, and costs directly linked to participation in education.

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### **5. Income Thresholds for Discretionary Bursary Eligibility**

Household income is assessed using **gross annual income** and verified through official documentation.

<b>Annual Household Income</b>	<b>Typical Level of Support</b>
Up to £25,000	High priority – higher rate of support
£25,001 – £30,000	Medium priority – partial support
£30,001 – £35,000	Low priority – essential costs only
Above £35,000	Normally not eligible unless exceptional circumstances apply

**Exceptional circumstances** may include:

- Sudden loss of income
- Multiple dependants in education
- Significant medical or care-related costs
- Young carers or estranged students

The Trust reserves the right to exercise discretion where evidence demonstrates genuine need.

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### **6. Eligible Use of Bursary Funds**

Bursary funding may only be used to support **participation in education**, including:

- Transport to and from school or college
- School meals or subsistence during the school day
- Course-related books, equipment, or materials
- Uniform or specialist clothing
- Educational visits or fieldwork
- Essential IT equipment or digital access

Funds **must not** be used for:

- Tuition or examination fees
- Non-educational activities
- Fines, penalties, or sanctions

- Social or leisure activities unrelated to study
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## **7. Application Process**

1. A bursary application form (**appendix A**) must be submitted each academic year.
  2. Applications must include supporting evidence, such as:
    - Proof of household income (e.g. benefits statements, P60, Universal Credit statements)
    - Evidence of vulnerable status (where applicable)
  3. Claims must be submitted with a completed claim form (**appendix B**)
  4. Applications are assessed on a rolling basis, subject to availability of funds.
  5. All information is treated confidentially and in line with data protection legislation.
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## **8. Assessment and Decision-Making**

- Applications are assessed by a designated Bursary Panel or authorised senior staff.
- Decisions are based on:
  - Eligibility against DfE criteria
  - Income thresholds
  - Evidence provided
  - Available funding allocation
- Priority is given to students with the greatest financial need.

Students are informed in writing of the outcome and the level of support awarded.

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## **9. Payment and Conditions of Support**

Bursary support may be provided through:

- Payments in kind (e.g. travel passes, meal credits)
- Direct payments to students or parents/carers (where appropriate)
- Reimbursement of receipted educational costs

Payments are normally made **termly** and may be conditional upon:

- Attendance and punctuality
- Engagement with learning
- Appropriate conduct

Failure to meet conditions may result in payments being reduced, suspended, or withdrawn.

### **10. Monitoring and Review of Awards**

- Attendance, progress, and engagement of bursary recipients are monitored regularly.
  - Awards may be adjusted if a student's circumstances change.
  - Students must notify the Trust of any changes affecting eligibility.
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### **11. Appeals Procedure**

Students may appeal against a bursary decision by submitting a written appeal within **10 school days** of notification.

Appeals will be reviewed by a senior leader not involved in the original decision. The decision following appeal is final.

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### **12. Fraud, Misuse, and Recovery of Funds**

Community Inclusive Trust reserves the right to withdraw bursary support and recover funds where:

- False or misleading information has been provided
  - Funds are used for non-approved purposes
  - Conditions of support are persistently breached
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### **13. Data Protection**

Personal data collected as part of the bursary process will be processed in compliance with UK GDPR and retained only for as long as necessary.

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### **14. Policy Review and Governance**

This policy is reviewed annually to reflect updated DfE guidance and Trust procedures.

**Policy Owner:** Community Inclusive Trust

**Approved By:** Executive Leadership Team

**Review Cycle:** Annual

**Last Reviewed:** Spring 2026

**Next Review Due:** Spring 2027

## Appendix A

### 16–19 Bursary Fund Application Form

**Academic Year:** \_\_\_\_\_

This form is to support applications for the 16–19 Bursary Fund.  
All information provided will be treated confidentially and used only to assess eligibility for financial support.

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#### Section 1: Student Details

Field	Information
Student Full Name	
Date of Birth	
Unique Learner Number (ULN)	
Year Group	
School / Academy	
Home Address	
Postcode	
Student Email Address	
Student Contact Number	

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#### Student Bank Details

Field	Student Bank Details
Account Holder's Name	
Bank Name & Branch	
Account Number	
Sort Code	

Except in exceptional circumstances where a student is unable to administer their own account; we do not expect bursary payments to be paid into another person's account.

**Section 2: Parent / Carer Details (if applicable)**

Field	Information
Parent / Carer Name	
Relationship to Student	
Contact Email	
Contact Telephone Number	

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**Section 3: Bursary Type Applied For**

(Please tick all that apply)

- Vulnerable Student Bursary (up to £1,200)
- Discretionary Bursary

If applying for the **Vulnerable Student Bursary**, please tick the relevant category below and provide evidence:

- In care
  - Care leaver
  - In receipt of Income Support (in own right)
  - In receipt of Universal Credit (in own right)
  - In receipt of ESA and Universal Credit (in own right)
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**Section 4: Household Income (Discretionary Bursary Only)**

Please indicate your **total gross annual household income**:

- Up to £25,000
- £25,001 – £30,000
- £30,001 – £35,000
- Above £35,000 (exceptional circumstances only)

**Source of Income (tick all that apply):**

- Employment
- Universal Credit
- Other benefits
- Self-employment
- Other (please specify): \_\_\_\_\_

**Evidence Required: (examples below of acceptable documentation)**

- Universal Credit statement
  - P60 (for most recent year end) – or 12 months wage slips
  - Self-employed earnings (official tax return)
  - Disability Living Allowance or Personal Independence Payments
  - Working/Child Tax Credit – Full award notice for full year
  - Award letters for Child Benefit; Housing Benefit or Carer’s Allowance
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**Section 5: Exceptional Circumstances (if applicable)**

Please provide details of any exceptional circumstances that impact your financial situation (e.g. young carer responsibilities, medical issues, sudden loss of income):

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**Section 6: Intended Use of Bursary Support**

(Please tick all that apply)

- Transport to and from school
  - School meals / subsistence
  - Uniform or specialist clothing
  - Course equipment or materials
  - Educational visits or fieldwork
  - IT or digital access
  - Other educational costs (please specify):
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**Section 7: Attendance and Engagement Declaration**

I understand that bursary payments are conditional upon:

- Regular attendance and punctuality
- Positive engagement with learning
- Appropriate behaviour in line with Trust policies

I understand and agree to these conditions

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**Section 8: Student Declaration**

I confirm that:

- The information provided in this application is accurate and complete
- I understand that providing false or misleading information may result in the withdrawal of bursary support
- I will notify the school of any changes to my circumstances

**Student Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Section 9: Parent / Carer Declaration (if applicable)**

I confirm that:

- The information provided is accurate to the best of my knowledge
- I understand that the bursary is intended solely to support educational participation

**Parent / Carer Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_

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**Section 10: Office Use Only**

<b>Item</b>	<b>Details</b>
Application Received Date	
Evidence Verified	<input type="checkbox"/> Yes <input type="checkbox"/> No
Bursary Type Approved	<input type="checkbox"/> Vulnerable <input type="checkbox"/> Discretionary
Award Amount	£
Payment Method	<input type="checkbox"/> Travel <input type="checkbox"/> Meals <input type="checkbox"/> Bank <input type="checkbox"/> Other
Conditions Applied	<input type="checkbox"/> Yes <input type="checkbox"/> No
Authorising Officer	
Decision Date	

**Data Protection Notice**

Community Inclusive Trust will process personal data provided in this form in accordance with UK GDPR and will retain it only for as long as required for audit and funding purposes.

**Appendix B**

**16–19 Bursary Fund Application Claim Form**

**Student Name:**

Category	Cost	Receipt Number	Further Details – (e.g. full supplier names or links to websites)
<p>Travel to/from place of study:</p> <p>If you require the school to pay the supplier directly, the following details will need to be confirmed:</p> <ul style="list-style-type: none"> <li>• name of the transport company</li> <li>• route number</li> <li>• pick-up locations</li> <li>• mobile number or student email address for the ticket to be sent to</li> </ul>			<p>Method of transport .....</p> <p>Distance between place of study &amp; home (miles) .....</p> <p>If bus, please confirm bus details (route/bus operator, pick up points) .....</p> <p>Cost of bus pass £.....</p> <p>Period covered (i.e.1 term, 1 week) .....</p> <p>Mobile/email address for tickets: .....</p>
<p>Books for the subject you are studying</p>			<p>Details of books required (website links, ISBN numbers, version number, etc):</p>
<p>IT / specialist equipment or materials</p>			

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Subject-Specific Educational Visits			
Exam re-sit fees			
UCAS Application, University Interviews / Open Days, Preparation courses			
School / 6 <sup>th</sup> form clothing, or specialist clothing required for studies			
Stationery, revision aids or general resources			
School lunches (funds will be added to your school catering account)			
Total cost being claimed for (£s):			

I confirm that this claim complies with the rules of the current 16-19 CIT Bursary Policy

**Student Signature:** \_\_\_\_\_

**Date of claim:** \_\_\_\_\_

**Student Bank Details** (to be completed for every claim even if payments have been made successfully previously)

Field	Student Bank Details
Account Holder's Name	
Bank Name & Branch	
Account Number	
Sort Code	