16-19 Bursary Fund Policy

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"Learning together, to be the best we can be"

1. Purpose and Scope

1.1. Nexus Multi Academy Trust (the Trust) is committed to ensuring equal opportunities for all pupils regardless of financial circumstances. This policy sets out how the Trust will administer the 16–19 Bursary Fund, including both the Vulnerable Student Bursary and the Discretionary Bursary.

1.2. The purpose of the bursary is to support students in post-16 education to overcome individual financial barriers to participation, ensuring equality of access and supporting student retention and success. This policy ensures funding is distributed fairly, and directed towards those that have the greatest need, based on an assessment of individual actual need.

2. Regulatory Framework

2.1. This policy is based on government guidance for the 16–19 Bursary Fund 2025–2026 and all awards will be made in line with those rules and requirements.

3. Types of Support Available

3.1. There are two types of post-16 bursary:

3.1.1. **Vulnerable Student Bursary** – for eligible students in defined vulnerable groups, up to the maximum amount set by the government (currently £1,200 per year). These pupils are unlikely to be receiving support from parents or carers.

3.1.2. **Discretionary Bursary** – bursaries that institutions award for students who need financial assistance to overcome barriers to learning. Awards may be in cash or in-kind (e.g. travel passes, equipment, books) and will be limited to the funds available. Where a student has applied for a Vulnerable Student Bursary but has costs exceeding £1,200, additional support may be considered form the Trust's discretionary bursary allocation subject to eligibility and assessment requirements.

4. Costs Covered

4.1. Both types of bursary funding are to help eligible students overcome the individual financial barriers to participation they may face, by supporting with the essential costs of participating in their individual study programme. These are items a student would otherwise need to pay for to participate (i.e. are not covered as standard or through pupil premium funding). Funding will be provided to cover actual need and costs, where there is evidence to support those. No flat or fixed rate payments will be made.

4.2. Examples of costs covered include:

- 4.2.1. travel to and from school or college (where not covered by a local authority's local offer);
- 4.2.2. buying essential course-related books or equipment;
- 4.2.3. uniform or specialist clothing (protective overalls, for example);
- 4.2.4. field trips where essential to programme goals, and UK based;
- 4.2.5. UCAS application fees or costs related to attending interviews or open days;
- 4.2.6. school lunch costs, where not covered elsewhere.

4.3. In exceptional cases, bursary funding may be used to support childcare costs for those young parents in receipt of Care to Learn, where costs exceed the scheme's maximum rates. Funding will be provided directly to the childcare provider in these instances.

4.4. Bursary funds are not intended to support costs not related to education, such as general living costs, extra-curricular activities, non-essential activities or to provide learning support (such as counselling, mentoring or extra tutoring). Funding cannot be used to support the costs of overseas field trips.

4.5. In cases of severe hardship, the Trust may provide temporary emergency support for essential travel or meals to enable a student to participate in their study programme while a full bursary assessment is completed. This provision will be used only in exceptional circumstances and for a temporary period. The Trust will subsequently complete the full eligibility and individual financial need assessment and will retain appropriate evidence of the support provided.

5. Eligibility Criteria

5.1. To be eligible for support, students must meet the criteria as set out in the latest DfE guidance.

5.2. For **both** the vulnerable and discretionary funds this includes:

5.2.1. Students must be aged 16 or over but under 19 on 31 August of the relevant academic year, subject to the exceptions for eligible students aged 19 or over set out in government guidance.

5.2.2. Meet residency requirements set out in DfE guidance for post-16 provision (Advice: funding rules for 16 to 19 provision 2025 to 2026 - GOV.UK);

5.2.3. Be enrolled at the school and not enrolled at another institution that also receives public funding for the student;

5.2.4. Not be enrolled on higher education or apprenticeship programmes;

5.2.5. Provide evidence of household income or receipt of qualifying benefits;

5.3. For the ***vulnerable groups bursary*** students must fall into one or more of the following categories:

5.3.1. Be in care or a care leaver;

5.3.2. Be an unaccompanied asylum-seeking child (UASC). These children are treated as looked after children and are the responsibility of the local authority;

5.3.3. Be receiving Income Support or Universal Credit *in their own right* because they are financially supporting themselves, or themselves and a dependent;

5.3.4. Be in receipt of Disability Living Allowance or Personal Independence Payments *in their own right*, as well as Employment and Support Allowance or Universal Credit *in their own right*.

5.4. We will obtain the following proof of eligibility for vulnerable groups:

5.4.1. For Pupils who are in care or a care leaver, written confirmation of their current or previous looked-after status from the relevant local authority. The evidence could be a letter or an email but must be clearly from the local authority.

5.4.2. For unaccompanied asylum seekers, a letter or email from their social worker will be accepted as written evidence of LAC status.

5.4.3. For Pupils in receipt of Income Support or Universal Credit, a copy of their Income Support or Universal Credit award notice. This must clearly state that the claim is in the Pupil's name/confirm they are entitled to the benefits in their own right. The evidence must not state any conditions that prevent them from participating in further education or training.

5.4.4. For Pupils in receipt of Universal Credit (UC), a tenancy agreement in the Pupil's name, a child benefit receipt, children's birth certificates, utility bills etc.

5.4.5. For Pupils receiving UC/Employment and Support Allowance and Disability Living Allowance and Personal Independence Payments, a copy of their UC claim from DWP (UC claimants should be able to print off details of their award from their online account). Evidence of receipt of Disability Living Allowance or Personal Independence Payment, must also be provided.

5.5. For the ***discretionary fund***, students aged 19 or over can continue to be eligible if:

5.5.1. They are continuing on a study programme they began aged 16 to 18; and/or

5.5.2. They are in receipt of an Education, Health and Care Plan.

5.6. To be eligible for discretionary bursary funding, pupils must fall into one or more of the categories below:

5.6.1. Eligibility for free school meals;

5.6.2. Receipt of Universal Credit (household or pupil);

5.6.3. Children seeking asylum.

5.7. When taking decisions on the distribution of limited discretionary bursary funds, we will consider the level of household income and prioritise support for those with a household income of £30,000 or lower (evidenced by the most recent 3 months Universal Credit award notices).

6. Application and Assessment Process

6.1. Students should complete the relevant Nexus MAT Bursary Application Form (available via the school office) and provide the required supporting evidence by the application closing date of the 30 September to make sure enough time is allocated to assess the overall level of demands and make discretionary awards on a fair basis. The school will accept applications throughout the year where a student is new or their circumstances materially change.

6.2. Both eligibility (household income checks) and need (actual costs faced) will be reviewed on an annual basis and students will only continue to receive a bursary if they continue to satisfy the criteria.

6.3. All applications will be assessed by the assessment panel, which will be chaired by the Headteacher and have no less than 3 members, typically those in the school leadership team. Supporting evidence will be reviewed and students will be notified of the outcome within two weeks of the application closing date. Applications and supporting evidence will be confidential to the assessment panel members, and in event of an appeal to those involved in the appeal process.

6.4. Upon confirmation of a bursary award, an award letter will be provided, stating the terms and conditions (for example provision of receipts, use of funds, attendance rates) and method of payment - to be signed by the pupil before funds are released.

6.5. Awards will be made based on individual financial need, with the amount based on actual participation costs. Automatic awards will not be made. Assessment on the level of support will consider the study programme (weeks per year and hours per week). Eligibility alone is not evidence of financial need, and need will always be based on actual participation costs that are not supported elsewhere.

6.6. Vulnerable group awards have a maximum of £1,200 as per government funding rules.

6.7. There is no set limit on the amount of discretionary bursary that can be awarded to students. The assessment panel has full discretion on decisions around which pupils receive a discretionary bursary, and how much they receive. This will be based on the student's individual circumstances and need as assessed against other applications, and the availability of funds. Payment conditions (attendance,

behaviour) will be clearly set out in any funding letter, along with other conditions such as returning equipment on completion of study.

7. Payments and Support

7.1. Support will be provided in-kind rather than in cash as far as possible. This may include directly providing books, ICT equipment or vouchers and travel passes. In the case of books or equipment, students must return these at the end of their study programme so that they can be used by other students going forwards. If the school requires the equipment to be kept at school, this will be made clear at the point of providing the equipment.

7.2. No cash payments will be made to accompanied asylum seeking children, under any circumstances.

7.3. Where re-imbursements or cash payments to students are required, payments will be made via BACs payment into the student's bank account, or in the case of unaccompanied asylum children, to a pre-paid card issued by the school where a bank account is not available. Payments will only be made on condition that receipts to evidence expenditure are provided on a timely basis (noting that there is no requirement to provide a receipt before provision of funding). Expenditure must evidence funding has been used for the purposes it was awarded. Large or lump-sum payments will not normally be made.

7.4. In the case of standard weekly costs (for example, meals or travel) where individual receipts are not practical, initial evidence of costs will be required, with the option of subsequent regular payments being based on attendance patterns. This remains at the discretion of the headteacher and will be clearly stated in the terms and conditions set out in the pupil's award letter.

7.5. Payments may be made conditional on students meeting agreed standards of attendance and behaviour. These conditions will be clearly communicated to students and will take account of individual circumstances. Where conditions are not met, the Trust may withhold or adjust future payments but will consider the student's individual circumstances before doing so.

7.6. Standard conditions of attendance and behaviour include:

- 7.6.1. Attendance at or above 85%, unless extenuating circumstances;
- 7.6.2. Following the school code of conduct.

7.7. Pupils are required to sign a declaration confirming that they agree to these conditions before funds are released. The Trust reserves the right to adjust or withdraw bursary payments if these conditions are not met or there is no evidence that the money has been spend for the reason awarded. We will stop payments where Pupils have been absent for a period of 4 continuous weeks or more (excluding holidays, or if there is evidence that the Pupil intends to return). We will consider the impact of such an action on individual students before taking a final decision and confirm any decision in writing.

8. Unspent Bursary Funding

8.1. Unspent bursary funding may be carried forward into the following academic year and must continue to be used to support eligible students in accordance with this policy and the government's 16–19 Bursary Fund guidance. Bursary funding must not be transferred to or used as general Trust or school funds.

8.2. The Trust will seek to use available unspent funding to support eligible students, including through pooling and redistribution across Nexus Multi Academy Trust schools in accordance with section 8.3.

8.3. Funding cannot be carried forward for more than one academic year. Any funding which remains unspent and is required to be returned will be reported to government office in accordance with its current requirements.

8.4. Vulnerable bursary funds are claimed directly from government via the school's
8.5. Sign-in account. Schools must ensure they follow the guidance for this return, available at:

8.5.1. https://www.gov.uk/government/publications/16-to-19-bursary-fund-guidance/

8.5.2. This includes reporting rules in relation to recycling funding, reporting zero bursary students and transferring unused funding for vulnerable groups across to discretionary funds.

9. Pooling and redistribution of bursary funding across the Trust

9.1. Nexus Multi Academy Trust may operate the 16–19 Bursary Fund on a pooled basis across its academies and post-16 provision, where this supports the effective and equitable use of available bursary funding.

9.2. Where a school has unspent discretionary bursary funding, the Trust may retain and redistribute that funding to support eligible students attending another Nexus Multi Academy Trust school, provided that:

9.2.1. Funding continues to be used solely for purposes permitted under the government's 16–19 Bursary Fund guidance;
9.2.2. Students receiving support meets the relevant eligibility criteria;
9.2.3. The amount of support awarded is based on an assessment of the individual student's actual financial need and actual participation costs;
9.2.4. The Trust maintains appropriate records identifying the source of the funding, the school from which it was transferred, the student receiving support, the purpose and amount of the award, and the evidence supporting the award;
9.2.5. The Trust complies with all government requirements concerning the use, carry-forward and return of unspent bursary funding.

9.3. The pooling or redistribution of funding does not create an entitlement to a bursary. All awards remain subject to the eligibility, assessment and evidence requirements set out in this policy.

9.4. The Trust may centrally manage the administration and allocation of pooled discretionary bursary funding on behalf of its academies.

10. Record Keeping and Audit

10.1. Schools will maintain records of all applications, evidence provided, decisions made, and payments awarded. Records will be retained for a minimum of six years. All bursary expenditure is subject to audit by government office. A summary of the required evidence is given in Appendix 1. All documents will be kept securely in line with Trust Data Protection Policy.

10.2. The Trust may use up to 5% of its discretionary 16–19 Bursary Fund allocation for reasonable administration costs associated with administering the bursary fund, in accordance with government guidance.

11. Appeals and Complaints

11.1. Students who are dissatisfied with a bursary decision may appeal in writing to the Headteacher of their school. If unresolved, the appeal will be escalated to in line with the Trust's Complaints Policy.

Appendix 1: Evidence required

Schools must keep evidence of robust and appropriate processes in place to record and assess bursary applications, and to support the payments and claims made.

For the bursary for vulnerable groups:

- a copy of the funding claim sent to DfE
- evidence showing that the student is eligible, for example, a letter from DWP or the local authority or a copy of the student's online UC statement
- Copies of signed formal agreements based on the Trust standard template
- evidence of payments received from DfE, for example bank statements and remittance advices
- a copy of the student's individual assessment of actual financial need, along with a breakdown of the calculation that has determined the amount required by the student
- receipts for purchases or in-kind support provided to the student, for example, bus pass, lunch receipts or book receipts
- attendance evidence to support payments

For the discretionary bursary:

- evidence used to assess eligibility and determine household income
- a copy of the student's individual assessment of actual financial need, including a breakdown of the calculation that has determined the amount awarded
- receipts for purchases or in-kind support provided to the student, for example, bus/travel pass, travel tickets, lunch receipts or book receipts
- evidence to support the value of any cash payments made to the student such as travel pass, bus tickets or meal deals
- attendance evidence to support payments
- Evidence of pooling/redistribution