North Kesteven Academy

Think Excellence

16-19 Bursary Fund Management Statement Academic Year 2026-2027

1. Legal framework

This policy has due regard to all relevant legislation and statutory guidance including, but not limited to, the following:

- ESFA (2025) '16 to 19 bursary fund guide 2025 to 2026 academic year'
- ESFA (2025) '16 to 19 funding: information for 2025 to 2026'
- Equality Act 2010

This policy operates in conjunction with the following school policies:

- Complaints Procedures Policy
- Attendance and Absence Policy
- Behaviour Policy
- Data Protection Policy

2. The setting's responsibilities

The setting will be responsible for determining the eligibility criteria for students and will set conditions for receiving the bursary, such as regular attendance. Arrangements for applying for bursaries will be straightforward and confidential.

The needs of each student who applies for the bursary will be assessed by the setting and evidence will be obtained to support each application. The setting will claim vulnerable bursaries from the Student Bursary Support Service (SBSS) for each eligible student.

Records will be kept by the setting of all assessments and payments. The application process will maintain confidentiality.

The setting will make this policy available early enough for students to be able to use the information when deciding which post-16 setting to attend.

The setting will comply with the requirements of the Equality Act 2010 when setting its criteria and will not discriminate against students because of their protected characteristics.

The setting will inform the ESFA of the total amount of any unspent funds (not previously reported) from any year up to and including the previous academic year no later than 31 March each year.

The setting will ensure it completes the new individualised learner record (ILR) or census fields to provide data on the number of students participating in extended work placements.

3. Raising awareness and take-up of the 16-19 bursary fund

To raise awareness of the bursary, the setting will employ different marketing activities, including the following as appropriate:

- Posting information about the bursary on the school website and in the prospectus, as well as on posters around the setting
- Distributing information at open evenings for Year 11 pupils

- Providing further information, such as the application form and details of the bursary, following enrolment for all new entrants to the setting in an enrolment pack, as well as a text message and email about the bursary at the start of the academic year
- Providing tutors with information to inform discussions between tutors and students

To identify students who may be eligible for vulnerable group bursaries, the setting will work with the LA, LAC education services and care leaver services to help and encourage students to apply for the bursary.

In addition, the setting will work with the LA to establish local data-sharing agreements to share information about which students may be eligible and who should be supported to make an application.

The setting will work with local stakeholders to identify eligible students for vulnerable groups by:

- Including information on the bursary within bulletins to social workers, published three times a year.
- Appointing an inclusion manager who develops links with local agencies working with vulnerable people, e.g. social services, to identify eligible students before enrolment.
- Developing networks with foster parents, schools, asylum support teams, youth offending services and health services.

The setting will establish whether students were in receipt of the pupil premium funding in Year 11 or received SEND support, which may indicate whether they are eligible for a discretionary bursary. The school will proactively approach identified students to see if they require support.

The setting will ensure that, in any marketing materials and the application form, procedures for how the institution maintains confidentiality are outlined to encourage more students to apply for the bursary.

4. Bursary fund statement

A bursary fund statement will be published every September on the school website. The bursary fund statement will outline the following:

- How the setting will use its funding
- The eligibility criteria for the bursary
- Terms and conditions for receiving the bursary, e.g. attendance and behaviour requirements
- The type of support offered through the bursary, e.g. with transport, books and equipment
- Whether the bursary fund contributes to other costs, e.g. attending university open days and interviews
- A statement explaining that the support available to students is from the bursary fund

5. Eligibility

Students who are aged 16 or over and under 19 years old on 31 August before the academic year in question may qualify for bursaries for that academic year.

Students aged 19 or over will be able to receive a discretionary bursary if they are continuing on a study programme they began aged 16 to 18, or if they have an EHC plan, provided they remain eligible and the setting determines they need the support to continue their participation.

Students aged 19 or over will not be eligible for bursaries for vulnerable groups.

The setting will only pay bursaries to students aged 16 or over, unless in exceptional circumstances, e.g. where a student is following an accelerated study programme. The setting will use its discretion to decide whether a student under the age of 16 is eligible – this is explained further in the 'Discretionary bursaries' section.

Students on apprenticeship programmes, or any waged training, are considered to be employed rather than in education – as such, they will not be eligible for the bursary.

Non-employed students aged 16-19 who are participating in a Prince's Trust Team Programme will be eligible to receive the bursary in the same way as any other student.

Students on distance learning provision will not likely need help from the bursary, but in instances where they require financial help, the setting will provide support in-kind, e.g. a temporary travel pass to attend exams.

Students will be permitted to apply more than once if their circumstances change. In this case, they will be reassessed, including a one-to-one interview to determine if there are any exceptional circumstances to consider.

Most students who receive a bursary will get a tailored award from the discretionary bursary. Students in need of more support will be permitted to apply for a vulnerable bursary.

Students must be participating in provision that is subject to inspection by a public body which assesses quality, e.g. Ofsted. The provision must also fall into one of these groups:

- Funded directly by the ESFA or by the ESFA via an LA
- Otherwise publicly funded and leading up to a qualification (up to and including level 3) accredited by Ofqual or on the ESFA list of qualifications approved for funding 14- to 19-year-olds

6. Young offenders

Students convicted or cautioned for a criminal offense, i.e. young offenders, will be able to apply for a bursary if they:

- Are serving a non-custodial sentence.
- Have been released early from a custodial sentence, except on temporary license.
- Have been remanded to a non-secure institution.

Young offenders cannot apply for a bursary if they:

- Are serving a custodial sentence.

- Have been released from a custodial sentence on temporary licence.
- Have been remanded to a secure institution.

As with all bursaries, the setting will provide in-kind support to young offenders rather than cash payments wherever possible.

7. Discretionary bursaries

The setting will ensure that discretionary funding is allocated to the students who are most in need of financial support. The setting's eligibility criteria for receiving a discretionary bursary will include:

- There is a household income below £35,000 and there is an identified need for financial assistance.
- Students who are from a single parent family or have one or more dependent siblings in their family.
- Students who have additional responsibilities, such as being a young carer or parent.
- Students estranged from parents.
- The household is in receipt of other income-based means tested benefits.

The setting will use household income to help establish the amount of support awarded to a student, if possible.

The amount awarded will be dependent on the amount of income – this will be allocated on different levels.

Household & Learner Income Bands	**BAND Reference**	**Possible annual support allowances for students**
Less than £20,000	A	**Up to £1000**
£20,001 - £25,000	B	**Up to £750**
£25,001 – £30,000	C	**Up to £500**
£30,001 - £35,000	D	**Up to £250**

Bursary Types	Vulnerable Bursary Allowance	Discretionary Bursary Allowance Band			
		A	B	C	D
Total Cost Assistance	Within allowance	Up to 100%	Up to 80%	Up to 60%	Up to 40%

Students who apply will be assessed individually. This assessment will be documented, and evidence to support the claims will be obtained and retained for auditing purposes.

The setting will not make blanket or flat-rate payments to all students or students in the income bands outlined above without considering the actual needs of each student.

The setting will manage the discretionary bursary to keep payments within budget. Where possible, the setting will retain a small emergency fund from its allocation to support students who face exceptional circumstances during the year due to a change in their situation that impacts on their ability to participate in education – evidence of a student's eligibility for emergency funds, the individual assessment and their actual participation costs will be held for audit purposes as for any other bursary award.

8. Vulnerable bursaries

The setting's eligibility criteria for receiving a vulnerable bursary will include students who are:

- LAC (this includes those classed as an unaccompanied asylum-seeking child).
- PLAC.
- Receiving Income Support or Universal Credit (UC) because they are financially supporting themselves and/or someone who is dependent on them and living with them, such as a child or a partner.
- Receiving Disability Living Allowance or Personal Independence Payments in their own right, as well as Employment and Support Allowance (ESA) or UC in their own right.

Proof will be required to evidence the above eligibility criteria for the bursary.

Via the application form, the setting will remind parents that they will not be able to continue to claim Child Benefit if the student successfully applies for ESA.

Students who are in one or more of these categories will be able to apply for a vulnerable bursary of up to £1,200.

Where a vulnerable student is on a course lasting 30 weeks or more and is participating full-time, they will be eligible to receive up to £1,200; students on study programmes of less than 30 weeks will receive a pro-rata amount. The setting will consider the number of hours involved in eligible students' study programmes when deciding if a pro-rata payment is more appropriate.

The setting may pay a student in a vulnerable group more than £1,200 if it believes the student needs extra help to remain in education; the extra payment will be paid from the setting's discretionary bursary allocation or its own funds. The rationale for such a decision will be included as part of the setting's auditable records.

The setting will only pay students the amount they need to access education, based on individual assessment. Students will not automatically receive £1,200 or a set amount of funding unless this is in line with their actual financial need.

The setting will only submit a funding claim to the SBSS once sufficient evidence has been provided and the setting has confirmed that the student needs financial support to participate.

The institution will be responsible for assessing whether students are eligible to receive a vulnerable bursary.

The institution may decide that, although a student may be eligible for a bursary, as they fall within one or more of the vulnerable groups, the bursary is not required as they do not have any financial need and do not need further support. If financial needs are already met and there are no other costs or they do not require the maximum award, the institution may decide not to allocate a bursary to the student.

Where the setting decides that a student is ineligible for funding in accordance with the above criteria, the setting will explain to the student and/or the student's parents the aim of bursary funding and why it is appropriate to not award any in this instance during a meeting, followed by written confirmation.

If a student or the student's parents still want to claim a bursary for vulnerable groups, they must inform the setting. The setting will then consider the particular circumstances in each case and assess whether:

- No bursary should be awarded, as the student has no financial needs; or
- A reduced bursary should be awarded, as the level of financial help needed is limited.

The setting will ensure its bursary application form is clear about the possibility of no award or a reduced award.

9. Paying bursary funding to eligible students

The setting will aim to pay all funding in-kind.

Payment in-kind may include, for example, travel passes, vouchers or credits for meals, or required books or equipment.

Where in-kind payments are given to students within vulnerable groups, the setting will explain the value of these payments to the student and how these have been deducted from the total £1,200.

Where payments are made to students, rather than in-kind, the funding will be paid by BACS transfer to the student's own bank account.

Payments will not be paid into another person's bank account unless exceptional circumstances mean that a student is unable to administer their own account. If a student cannot manage their own funds, the setting will consider who will manage the bursary on the student's behalf.

The setting has the right to determine how often payments are made – when doing so, the following will be considered:

- The reason the bursary was awarded
- The student's circumstances
- Local arrangements

The setting has the right to insist that students only spend bursary payments on the support that has been identified as necessary to help them access education, e.g. to pay for travel costs.

The setting will adhere to good practice guidelines to make regular payments to students on termly basis.

The setting will not pay bursaries to students in large or lump sums.

If students or their parents have any queries about payments, they should contact the Kayleigh Harpham on finance@nkacademy.co.uk or 01522 881415.

The setting may use up to 5 percent of its allocation from the ESFA for administrative costs.

10. Conditions for receiving bursary funding

Receipt of a vulnerable or discretionary bursary will be conditional on the student meeting the agreed standards set by the institution.

The conditions of payment will be clear and accessible to students, as well as being thoroughly explained as part of the induction process.

Evidence that the student has seen and agreed to the conditions will be kept for audit, such as an agreement signed by the student, in accordance with the 'Student declarations' section.

Students in receipt of bursaries must have 95 percent attendance at timetabled lessons, unless the absence is authorised. Consideration will be given to the impact on attendance that might be caused by illness, caring responsibilities or other exceptional circumstances.

Vacation breaks outside timetabled school holiday times will not be permitted.

Students in receipt of bursaries will be expected to abide by the Behaviour Policy of the setting.

Where there are concerns regarding a student's attendance or behaviour, the setting will discuss the issue with the student and consider individual exceptional circumstances before withholding any payments. In all cases, sanctioning will not occur to the extent a student's ability to attend education is undermined.

The setting will ensure that all parents and students are aware of the possible impact that attendance may have on payments, outlined in the application form.

Where a student withdraws themselves from a study programme, payments will be stopped.

Money may be taken back from students if it has not been spent for the reasons it was awarded to them. Before doing so, the setting will always consider the impact of this on the student.

The setting may specify that students return any books and equipment purchased for them through the bursary, such as a laptop, at the end of their study programme for use by other students. This will be clearly communicated to students and their parents upon confirming eligibility for the bursary.

The setting will require receipts for expenditure, where appropriate, to confirm that funding is being used for the reason it was awarded. For standard weekly costs, e.g. travel and food, receipts will not be collected for each transaction, and will instead be evidenced initially by receipts and then paid afterwards linked to attendance. Students may be asked at various points in the year to provide further receipts. For one-off or infrequent costs, receipts will always be collected. In all cases, students will not be asked to incur expenditure and provide a receipt prior to receiving funding – payment will be made first and a receipt provided afterwards, as necessary.

The setting will highlight to students and parents the impact of receipt of the 16-19 bursary fund on other benefits. This includes information that:

- Receipt of bursary funding will not impact the receipt of other means-tested benefits paid to families, e.g. Income Support.
- Receipt of Disability Living Allowance or Employment Support Allowance will mean parents can no longer receive certain benefits for that child, e.g. Child Benefit.

11. Recycling bursaries

The setting will be accrue some unused funding for bursaries for vulnerable groups during the academic year, e.g. if a student leaves early after only receiving part of their bursary, or if the full amount was not paid as the student did not meet the agreed conditions (until 30 April 2025).

Where the setting has accrued funds as specified above, it will use these funds for another student, rather than claiming for the full amount.

If the setting has sufficient funds to cover the costs of a full bursary, it will submit a funding claim showing a value of zero to the SBSS and use the amount to fund the new student.

If the setting decides that a student is in one or more of the defined vulnerable groups, but does not have any actual financial need, it will submit a funding claim showing a zero amount.

The setting will be able to add any funding for bursaries for vulnerable groups it has claimed, but no longer needs, for eligible students for discretionary bursaries (from 1 May 2025). Funds will be allocated in this way on a case-by-case basis after assessing students' needs.

The setting will consider carrying forward any unspent funds to the next academic year, but not for more than one year – any carried funds will only be used to support students in line with this policy, and will not be added to general funds. Unspent funds carried forward will be used before using the setting's new academic year allocation.

If the setting has no other students who are eligible for a bursary for vulnerable groups and funds have been claimed in error, it will contact the ESFA and arrange to return the funds.

12. Student declarations

Students and/or their parents will sign a declaration when they apply for either a vulnerable or discretionary bursary, confirming that any evidence given in support of the application is correct.

By signing the declaration, the student and their parents are agreeing to all the conditions and eligibility criteria.

The setting will retain copies of the declaration and supporting documentation for six years – this includes:

For vulnerable groups:

- A copy of the funding claim sent to SBSS.
- Evidence showing that the student is eligible, in line with this policy.
- Evidence of payments received from the SBSS, e.g. bank statements.
- A copy of the student's individual assessment of actual financial need, including a breakdown of the calculation that has determined the amount required.
- Receipts for purchases or in-kind support provided to the student, e.g. bus pass, lunch receipts or book receipts.
- Evidence to support the value of any cash payments made to the student.
- Attendance evidence to support payments where applicable.

For discretionary bursaries:

- Evidence used to assess eligibility and household income, e.g. P60's, self-employment accounts, wage slips, a letter from DWP and copies of online statements for UC.
- A copy of the student's individual assessment of actual financial need, including a breakdown of the calculation that has determined the amount required.
- Receipts for purchases made or in-kind support provided, e.g. bus pass, lunch receipts or book receipts.
- Evidence to support the value of any cash payments made to the student.
- Attendance evidence to support payments where applicable.

All data will be handled confidentially and stored securely in line with the Data Protection Policy.

13. Managing applications

The setting will use its own application form for the bursary fund.

The application form will capture all the relevant information needed to assess the application in line with this policy, including:

- Household income.
- The student's actual financial needs to support their participation.
- Specific deadline dates.
- The student's signature indicating they have seen and agreed to the terms and conditions of the funding and that all information provided is accurate.

Applications for the 16-19 bursary are able to be submitted at any time during the academic year.

The setting will not, however, implement a cut-off date for applications, in recognition that some needs may arise throughout the academic year.

The date for applications to be submitted will be outlined in the bursary fund statement, the bursary application form and any marketing materials.

Application forms and marketing materials will outline that students who meet the criteria for bursaries for vulnerable groups are not automatically entitled to receive them, e.g. if they do not have any financial needs or these needs are covered by alternative means.

14. Quality assurance

The setting will use the ESFA's '16 to 19 Bursary Fund Checklist' to confirm which documents have been provided for each student, as outlined in the 'Student declarations' section – these relate to the following:

- The application process
- The decision to award the specified amount of bursary
- The funds that have been issued to the student

The setting will maintain written records of the following:

- The number of applications received
- The value of all bursaries awarded
- The purpose of all bursaries awarded

- Which applications qualified for the bursary and which did not
- Brief descriptions of the institution's justification for any decision to award a bursary or not

The setting will retain copies of any documents the student has signed to give formal agreement to their conditions for payment, as well as any others mentioned in this section, for six years.

15. Auditing, assurance and fraud

The setting will be responsible for investigating any suspected instances of fraud relating to bursary fund applications.

The setting will ensure that appropriate processes are in place to record bursary applications and expenditure at student level. This will include:

- A breakdown of the value, including the purpose, type of cost and whether paid or not.
- A brief justification for the decision.

The setting will ensure that it can clearly evidence the following:

- The application process
- How students were assessed as eligible
- How the decision has been made to award the specific amount of bursary based on financial needs
- The funds that have been issued to each student

Copies of documents signed by students to give formal agreement to their conditions for payment will be retained.

Students and their families will be informed that providing false or incomplete information that leads to incorrect payments or overpayment may result in a referral to the police with the possibility of the student and/or their family facing prosecution.

If evidence comes to light that supplied information is misleading or fraudulent, the setting will stop any further payments and will attempt to recover any payments already provided to the student.

Where significant fraud is identified, the setting will report this to the ESFA. Significant fraud involves one or more of the following:

- The amount of money is in excess of £1,200
- The particulars of the fraud are novel, unusual, systematic or complex
- There is likely to be great public interest due to the nature of the fraud or the people involved

14. Conditions for using the bursary

The bursary fund will not be used by the setting for any reasons which would give it a competitive advantage over other settings, such as:

- Fees for access to facilities in the setting.
- Block subsidy of the canteen.
- Block subsidy of transport.

- Block provision of equipment, material or books.
- Bonus payments to reward attendance or achievement.
- Payments to support students' general living costs.

The bursary will not be used as a way of incentivising attendance or as a marketing tool to encourage students to this this setting over another.

Block payments to students for attendance, irrespective of their actual financial need, will not be paid.

The bursary fund will only be used for supporting students who have a genuine financial difficulty which might prevent them from continuing in education, rather than acting as an incentive for attendance.

Complaints and appeals

All complaints and appeals must be made in writing in accordance with the Complaints Procedures Policy.

If the complaint or appeal concerns operational processes or customer service for a vulnerable bursary funding claim, the SBSS will deal with the case. If the case is not resolved following this, it will be passed to ESFA.

The setting will act as a first point of contact for students who have complaints and will support students as much as possible throughout the complaints procedure.

Complaints made regarding the setting and the setting's provision of support will be dealt with in accordance with the procedure set out in the Complaints Procedures Policy.

Monitoring and review

This policy will be reviewed annually by the headteacher. The next scheduled review date is 15th September 2025.

The setting will ensure that this policy is implemented correctly and appropriately at all times.

The setting will communicate any changes to this policy to all staff and relevant stakeholders.