

# 16-19 Bursary Fund – Policy & Guidance

## 1. Introduction

The 16-19 Bursary Fund can provide financial support to help students overcome the specific financial barriers to participation they may face so they can attend and remain in post 16-education and access the courses available at Old Swinford Hospital.

The School is an eligible education provider being publicly funded.

This policy is based on advice from the DfE on the 16-19 bursary fund for the 2025-2026 academic year.

## 2. Aims

The School aims to:

- Have clear and transparent processes for the use and allocation of 16 to 19 bursary funds
- Make clear to parents/carers and students the type of support that is available and the means of applying for it
- Make clear to parents/carers and students the attendance and behaviour conditions for receiving the funds

The application and review process will be overseen by the Headmaster and managed by delegated staff.

## 3. The 16-19 Bursary Fund

There are 2 types of 16-19 bursaries:

- Bursaries for defined vulnerable groups; and
- Discretionary bursaries.

Both types of bursary funding are to help eligible students with essential costs of participating such as travel to and from school or college or to buy essential books, equipment, or specialist clothing (protective overalls, for example) that are required for their individual study programme. These are items a student would otherwise need to pay for to participate.

Eligibility for bursary support is defined in DfE regulation and the School must follow these regulations in determining awards from the 16-19 Bursary Fund.

## 4. How we use the bursary fund

Applications can be made for contributions to the following expenses:

- School uniform
- School lunches (taken at school)
- Transport costs to/from home/school
- Individual tuition in a musical instrument if the student is doing A Level music and active in the musical life of the school
- Essential educational school trips.
- Materials relevant to the students' course
- Participation in personal and leadership development via, for example, the Duke of Edinburgh of CCF programmes.
- Work experience
- University interviews and open days

The amount of support is dependent on eligibility, an assessment of financial need, the value of funding received from the DfE and the number of applications received.

A bursary will be a contribution to a cost, it will not necessarily cover the whole cost. The value of any bursary will be discretionary.

If there are more applications by the closing date than available funds, priority, in order, will be given to making contributions to:

- School lunches
- Transport costs
- Uniform
- Course materials and essential educational trips

Applications for assistance with any other relevant costs relating to the students' education will be considered if there are sufficient funds remaining.

All funding MUST be agreed by the Bursar before the expenditure is incurred.

Students in receipt of the Bursary Fund can apply to have a "loan" laptop for the duration of their studies at School, subject to the usual terms of the loan agreement.

## 5. What the bursary fund does not pay for

The bursary fund is not intended to provide:

- Learning support such as counselling and mentoring services or extra tutoring for example;
- Extra-curricular activities that are not essential to a students' study programme; or
- Provide support for living costs.

## 6. Eligibility

The 16-19 Bursary Fund is for students in post-16 education i.e. Sixth Form.

All students must meet the age and residency criteria which are:

### Age

- A student must be aged 16 or over but under 19 on 31 August to be eligible for help from the bursary fund in the academic year
- An exception to the age rule can be made for discretionary bursaries where a student:
  - Aged 19 is continuing on a study programme they began aged 16–19 (19+ continuers), or
  - Aged 19 or over has an Education, Health, and Care (EHC) Plan.
- Any 19+ continuer must be on the same study programme they started before turning 19.
- Any 19+ student must still be eligible and considered by the School to still need support to continue their participation.
- In exceptional circumstances where under 16 students are on funded 16-19 study programmes, for example those on an accelerated study programme, the School may at their discretion pay bursaries to 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.

### Residency

- Students must meet the residency criteria in DfE funding rules for post-16 provision. This should be established before the student commences their study programme.
- Subject to regulation, asylum seekers who have not had their application for asylum refused, but not yet had it agreed, may only be provided with in-kind support only, the exception being for unaccompanied asylum seeking children who are treated as looked after children and are eligible for a bursary for vulnerable groups. Where asylum claims have been turned down and the appeals process exhausted support would be withdrawn save to the extent of what may be in breach of human rights.

Students must attend the School for their learning programme. Distance learning will not generally qualify. Exceptions to this would be where eligibility would apply for an in school provision but the student is unable to attend and requires equipment for example to continue their participation or requires a transport concession to attend for examinations.

Emergency meal support may be given at the discretion of the School where it believes the student is in real need. This will be a temporary response pending an application for a discretionary bursary.

## 7. Assessing support

The School is required to:

- Ensure that bursary funds go to those who genuinely need them;
- Assess the need and value of support for each individual student based on their participation needs;
- Have evidence of the actual costs they are making an award for, and
- Assess need each year.

The School must carry out a financial assessment for each student to establish their household income, whether there is an actual financial need<sup>1</sup> and what kinds of costs the student has. It cannot give out unevidenced or general round sum grants and neither can students expect to get the same as any other student where their circumstances differ.

Where the School chooses to exercise its discretion and carries out household income checks just once at the beginning of a student's study programme it will require, for the second year of any funding, a signed and dated self-declaration form that household circumstances have not changed.

Where a student in receipt of an award changes course or level, the School will reassess the eligibility of the student and the study programme. In cases where either the student or study programme fails to meet the eligibility criteria support will be withdrawn and where it appears the need for support is reduced the award may be correspondingly reduced or withdrawn.

The School will exercise its discretion and award emergency meal support for the days the student attend their study programme where it considers a student is in real need and this will be done without household income checks.

In assessing support the School will refer to DfE guidance outlined in Appendix A.

## 8. Bursaries

### 8.1. Bursaries for Defined Vulnerable Groups

Vulnerable groups are defined as those students who are:

- In care or are care leavers,<sup>2</sup> or
- Receiving 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, or
- Receiving Disability Living Allowance or Personal Independence Payments in their own right as well as Employment Support Allowance or Universal Credit in their own right.

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<sup>1</sup> For the discretionary bursary, the School can exercise discretion as to whether it carries out household income checks annually or just once at the beginning of a student's study programme.

<sup>2</sup> The 16-19 Bursary Fund defines 'in care' 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). Section 22 of the Children Act 1989 defines the term 'looked after child'. A '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.

A young person placed in foster care by the Local Authority is classed as a looked after child.

A child privately fostered is not classed as a looked after child and therefore is not eligible for the bursary for vulnerable groups.

These students are unlikely to be receiving financial assistance from parents or carers, so may need a greater level of support to enable them to participate.

The bursary may be up to £1,200 a year for a student on a full time study programme lasting 30 weeks or more and dependant on circumstances and need, which must be evidenced. Students on study programmes of less time are likely to need as much support however due consideration will be given to the number of hours attended each week overall.

Household income checks may not be required however continued eligibility will be checked annually. This includes foster carers income although the School will consider what costs may be already covered by the Local Authority.

Funding must be based on actual costs.

Meeting the criteria for a bursary for vulnerable groups does not automatically entitle anyone to funding. It will not be allocated where participation needs are already supported in other ways or by other parties.

A student in receipt of a vulnerable group bursary may additionally supported via a discretionary bursary, subject to meeting the criteria for a discretionary award, where it is assessed that they need extra help to remain in education.

A student meeting the criteria for a defined vulnerable group is not automatically eligible for a free meal. This has its own and separate criteria.<sup>3</sup>

## 8.2. The Discretionary Bursary

An application for a discretionary bursaries can be made by any eligible student, including those who have also applied for a vulnerable group bursary.

In addition to the eligibility criteria noted above, the School sets the following criteria for awards from discretionary bursary funds where total household income and allowances are under £30,000 per annum. Allowances may be , for example, any of the following:

- Income Support /Universal Credit
- Income-based Jobseeker's Allowance
- Income related Employment and Support Allowance
- The guaranteed element of Pension Credit
- Child Tax Credit (provided they are eligible for Working Tax Credit).

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

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

In exceptional circumstances, and subject to the availability of funding, the Bursar may request the discretion from the Headmaster to agree to a one off contribution in support of a student who does not meet the criteria above but is assessed as having need..

## 8.3. Payment Conditions

Payment of a bursary is conditional on students meeting the following requirements in relation to their attendance, progress and standard of behaviour:

- Levels of attendance above 90%, subject to exceptional circumstances;
- The majority of Attitude to Learning grades being Good or Outstanding;
- Meeting or working within the reach of grade targets, and

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<sup>3</sup> Refer to 'Free meals in further education'

- Following all aspects of the School's Behaviour Policy and has a record of positive behaviour points and no significant negative behaviour points.

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

#### **8.4. Applications**

Applications must be made to the Bursar by **30<sup>th</sup> September annually**. Application forms are available from the Head's of Year 13/13.

Please make sure your application includes the relevant evidence and/or proof of payment in support of your application.

Students becoming eligible part way through an academic year are able to make an application. Their partial award will only last for the remainder of that academic year. These payments are subject to funds still being available in the 16-19 Bursary Fund. A new application should be made at the start of the next full academic year.

Applications must be made for each academic year. Where the School chooses to exercise its discretion and carries out household income checks just once at the beginning of a student's study programme it will require, for the second year of any funding, a signed and dated self-declaration form that household circumstances have not changed. This should be provided with the application form.

The Headmaster will make the decision on awards and the Bursar will notify applicants of the outcome and the process of making any payments.

For enquiries about the 16–19 bursary please contact the Bursar on [lgreen@oshsch.com](mailto:lgreen@oshsch.com).

#### **9. Record Keeping**

Applications and all evidence of checks and receipts will be retained by the school as proof of eligibility for the purposes of DfE audits of the 16-19 bursary scheme and will be retained and used in accordance with our data protection policy and privacy notice both of which can be found on the School's website at [www.oshsch.com](http://www.oshsch.com).

#### **10. Appeals**

Appeals against the Headmaster's decision to make an award from the 16-19 Bursary Fund should be made in writing to the Governors of Old Swinford Hospital, C/O the Clerk to the Governors, within four weeks of the Headmaster's decision.

<b>16-19 Bursary Fund Checklist</b>	
<b>Eligibility: All Bursaries</b>	
• Student meets the age criteria	
• Eligible education provision	
• Student meets the residency criteria for post-16 provision	
• Evidence of eligibility has been retained	
<b>Bursary for defined vulnerable groups</b>	
• Does the student fall 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 financial need and actual costs they have <i>Note: no student should automatically receive £1,200</i>	
• Has appropriate evidence been seen and copies retained to confirm student's eligibility, including the letter to support in care	
• What support was awarded in kind (bus pass, meal vouchers, books or equipment purchased on student's behalf) <i>Note: receipts must be retained</i>	
• Letter issued to student confirming the amount of support, what support will be made in-kind and payment conditions	
<b>Discretionary bursary</b>	
• Confirm the student meets the School's 16-19 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 <i>Note: block, blanket or flat rate payments are not permitted – the financial support from bursary funds should reflect the actual costs the student has</i>	
• What support was awarded in kind (bus pass, meal vouchers, books or equipment purchased on student's behalf) <i>Note: receipts are to be retained</i>	
• Letter issued to student confirming the amount of support, what support will be made in-kind and payment conditions	

## Application Form

### Old Swinford Hospital 16-19 Bursary

***The student/parent/carer applying for the bursary funding must complete this form.***

***Please return the form together with all supporting documents to the Finance Department.***

*If you need any help with this form please telephone the School on 01384 817315 and ask for Sarah Robinson.*

**SECTION 1 – Student Details** (please print details and complete in black ink)

First Names :	Surname :
Date of Birth :	Home telephone No :
Email :	Mobile No :

**SECTION 2 – Bursary for Defined Vulnerable Groups**

Please tick the box that applies to you:

- I am living in care
- I am a care leaver
- I am in receipt of Income Support or Universal Credit
- I am in receipt of Disability Allowance or Personal Independence Payments as well as Employment Support Allowance or Universal Credit

**SECTION 3 – Discretionary Bursary**

Please tick the boxes that apply to you:

- I am a student who permanently lives in a household whose total income and allowances is below £30,000

I am a student who permanently lives in a household whose parents/guardians receive one of the following. (Please tick the appropriate box)

Name of person receiving benefit :	Income Support	Job Seekers Allowance	Employment Support Allowance	Universal Credit	Support under Part VI of the Immigration and Asylum Act
1.					
2.					

**Please note: In all cases, you must provide proof of income.**

## Financial Assessment – Income

To be completed by the person(s) responsible for the household bills

Name of person receiving income	Are you employed	
1.	Yes/No	If yes, please submit P60 or Working Tax/Universal Credit Award Certificate – or other Inland Revenue acceptable proof
2.	Yes/No	If yes, please submit P60 or Working Tax/Universal Credit Award Certificate – or other Inland Revenue acceptable proof

### SECTION 4 – Proof of Income/Benefit Submitted

Whatever you have declared in Sections 2 or 3 must be supported with evidence in order for an assessment to be made.

The tables below show the evidence you will need to bring with this application form.

All evidence should be dated within the last 3 months or if earlier, give a reason for this.

Please tick the ones you are providing.

#### Bursary for a Vulnerable Group

Type of Income	Evidence Required	Tick if Supplying
<b>Looked after status</b>	Written confirmation of the student's current or previous looked-after status from the relevant local authority	
<b>Income Support/Universal Credit</b>	Income Support/Universal Credit Entitlement/Award Notice in the student's name	
<b>Disability Allowance or Personal Independence Payments</b>	Disability Allowance/Personal Independence Payments Entitlement/Award Notice in the student's name	
<b>Job Seeker's Allowance</b>	Entitlement/Award letter in the student's name	
<b>Employment Support Allowance</b>	Entitlement/Award letter in the student's name	

#### Discretionary Bursary

Type of Income	Evidence Required	Tick if Supplying
<b>Annual Salary</b>	P60 for previous tax year, or the payslip for last week in March (or Month 12) of the current year	
<b>Income Support</b>	Entitlement/Award letter – for the last 3 months	
<b>Job Seeker's Allowance</b>	Entitlement/Award letter – for the last 3 months	
<b>Employment Support Allowance</b>	Entitlement/Award letter – for the last 3 months	
<b>Incapacity Allowance</b>	Entitlement/Award letter – for the last 3 months	
<b>Carer's Allowance</b>	Entitlement/Award letter – for the last 3 months	

<b>Any other benefit</b>	Entitlement/Award letter – for the last 3 months	
<b>Working Tax/Universal Credit</b>	Working Tax/Universal Credit Entitlement/Award Notice in the parents' name	
<b>Child Tax Credit</b>	Working Tax/Universal Credit Entitlement/Award Notice in the parents' name	
<b>Grants or bursaries etc.</b>	Relevant paperwork detailing entitlement and amount paid	
<b>Disability Living Allowance</b>	Entitlement/Award letter – for the last 3 months	
<b>Any Other Income</b>	Relevant paperwork	

### SECTION 6 – Costs applied for

Please state what costs you are applying for the bursary to contribute towards

**You must provide evidence of the actual costs you will incur and attach this to your application**

<b>Details of cost e.g. school lunches, transport etc</b>	<b>What evidence is attached?</b>

### SECTION 6 – Conditions to be accepted by the student

If you are successful in your application you must accept the following conditions in relation to attendance, progress and standard of behaviour:

- Levels of attendance above 90%, subject to exceptional circumstances;
- The majority of Attitude to Learning grades in termly reports being Good or Outstanding
- Meeting or working within grade targets
- Follow all aspects of the School's Behaviour Policy and has a record of positive behaviour points and no significant negative behaviour points.

A breach of these conditions will lead to a reassessment of any bursary award and may lead to its withdrawal.

If you accept these conditions please sign below.

<b>Name:</b>	
<b>Signed:</b>	
<b>Date:</b>	

## **SECTION 7 – Declaration**

We understand that giving false or incomplete information that leads to incorrect/overpayment may result in future payments being stopped and any incorrectly paid funds being recovered and in such cases this might result in a referral to the police with the possibility of the student and/or parents/carers facing prosecution.

We confirm that the evidence provided is correct and complete to the best of our knowledge and belief.

	<b>Student</b>	<b>Parent</b>	<b>Parent</b>
<b>Name:</b>			
<b>Signed:</b>			
<b>Date:</b>			

**Please check this form before you return it.**

- **Is it complete?**
- **Have you attached all appropriate supporting evidence?**
- **Is it signed?**

**Bursary applications will not be considered until your form is complete, evidenced and signed.**