16–19 Bursary Fund Policy

Policy version control

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Approved by	Claire Lovel, Head of Compliance and Reporting
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Review	Policies will be reviewed in line with OAT's internal policy schedule and/or updated when new legislation comes into force
Description of changes	

1. Purpose

This policy sets out how Ormiston Kensington Queensmill Academy ("the academy") will administer the 16 to 19 Bursary Fund, provided by the Department for Education (DfE), for the 2026 to 2027 academic year. It explains who can apply, how applications are assessed, how much support students may receive, and how awards are paid and monitored.

The 16–19 Bursary Fund is provided by the Department for Education (DfE) to support eligible students facing financial barriers to participation in education. It is to be awarded to individuals, specifically targeting those who are financially disadvantaged, thereby facilitating their education. Bursary payments will be linked to attendance, behaviour and progress, and will be paid in instalments.

There are two types of bursary:

- Bursary for defined vulnerable groups – for students in specific circumstances set out by the DfE.
- Discretionary bursary – awarded by the academy to students who face financial barriers to participation, based on individual assessment of need.

This policy applies to all students aged 16 to 19 (and eligible students aged 19 or over, as set out in Section 3) enrolled on an eligible study programme at Ormiston Kensington Queensmill Academy.

2. Principles

The school will allocate bursary funding fairly, transparently and according to need. Funding will be used to remove barriers to participation, attendance, learning, preparation for adulthood and progression.

All awards must be based on a student's actual, assessed financial need – not automatic entitlement. The academy will not make blanket, flat-rate or fixed payments (including automatically awarding £1,200 to every student in a vulnerable group).

Eligibility for a defined vulnerable group does not guarantee funding; the student must also demonstrate a genuine, evidenced participation cost.

The academy will assess each application fairly, consistently, and in line with the Equality Act 2010, without direct or indirect discrimination against protected characteristics.

3. Eligibility

3.1 Age and residency

To be eligible for either bursary, a student must be aged 16 or over but under 19 on 31 August 2026, meet the residency criteria set out in DfE post-16 funding rules, and be enrolled on an eligible study programme at the academy that is subject to inspection (for example, by Ofsted).

Students aged 19 or over may only receive the discretionary bursary, and only if they have an Education, Health and Care (EHC) plan, or are continuing on the same study programme they began aged 16 to 18 ("19+ continuers"). Students aged 19 or over are not eligible for the defined vulnerable group bursary.

3.2 Defined vulnerable groups

A student may be eligible for a top-up bursary of up to £1,200 a year if they fall into one of the following defined vulnerable groups and have an assessed financial need:

- Students who are in care.
- Care leavers.
- Students receiving Income Support, or Universal Credit in their own right because they are financially supporting themselves (or themselves and a dependant, such as a child or partner).
- Students receiving Disability Living Allowance (DLA) or Personal Independence Payment (PIP) in their own right, in addition to Employment and Support Allowance (ESA) or Universal Credit in their own right.

Receipt of DLA or PIP alone does not meet the criteria for this last category — the student must also be receiving ESA or Universal Credit in their own right.

3.3 Discretionary bursary

Students who do not fall into a defined vulnerable group, but who face financial barriers to participation, may apply for the discretionary bursary. The academy will assess applications with reference to household income alongside other relevant factors, which may include:

- distance and cost of travel between the student's home and the academy;
- the number of dependent children in the household;
- the specific costs of the student's study programme (for example, equipment, specialist clothing, or industry placement costs);
- previous eligibility for free school meals (as an indicator only — actual need is assessed individually).

There is no DfE-set threshold; the academy sets its own criteria within the funding rules.

4. Eligible Costs

The following sections highlight the costs that the bursary can and cannot be used for:

4.1 Eligible costs

- Travel to and from the academy.
- Essential books and equipment required for the student's study programme.
- Specialist clothing or equipment (for example, protective overalls).

- Contributions towards university open days, interviews, or UCAS application fees.
- Essential field trips that are directly mapped to study programme goals or course objectives.
- Exceptional top-up support for childcare costs, where these exceed Care to Learn scheme maximum rates and are paid directly to the childcare provider.

4.2 Costs the bursary cannot fund

- General living costs, such as rent, household bills or general food shopping.
- Non-essential extra-curricular activities.
- Learning support or pastoral services, such as counselling, mentoring or tutoring.
- Servicing of laptops or tablets.
- Overseas field trips where equivalent content is available in England at lower cost, unless clearly essential to the course.
- Payments made to reward attendance or achievement, or to gain competitive advantage over other institutions.

Payment of the bursary does not affect a student's or family's other means-tested benefits, including Universal Credit.

5. Priority for Funding

Priority 1: Vulnerable Student Bursary categories as defined by ESFA.
Priority 2: Students experiencing significant financial hardship.
Priority 3: Students requiring support with essential participation costs.
Priority 4: Exceptional circumstances considered by the Headteacher or delegated senior leader.

6. Application Process

Students and families will be invited to apply using the school's bursary application form. Evidence of financial circumstances may be requested. Applications may be submitted at any point during the academic year.

There is no guarantee of funding, even for students in a defined vulnerable group. Awards are made only where a genuine, evidenced financial need is identified.

The academy will notify applicants in writing of the outcome of their application, including the amount awarded, its purpose, and how it will be paid.

Awards will normally be made conditional on the student meeting agreed standards of attendance and behaviour, as set out in the student's award letter. Payments may be withheld if these conditions are not met, taking into account individual circumstances.

7. Assessment

Applications will be assessed by the Headteacher and Business Manager. Awards will be based on need, available funding and the purpose of the expenditure.

8. Payment Arrangements

As a cashless school, bursary awards will normally be provided through direct payment to suppliers, purchase of goods or services by the school, or other approved cashless payment methods. Cash payments will not be made. All awards must be supported by appropriate evidence and used solely to support participation in education.

8.1 DfE funding claim windows (2026 to 2027)

The academy will submit funding claims for the defined vulnerable group bursary to the DfE within the following windows:

Purpose	Application window	Payment made
First window	7 September 2026 – 11 November 2026	March 2027 (academies)
Second window	4 January 2027 – 10 February 2027	May 2027 (academies)
Third window	17 May 2027 – 30 June 2027	October 2027 (academies)

Discretionary bursary allocations are paid to academies in two instalments: two-thirds in August 2026 and one-third in April 2027 (the first payment for academies is made in September, in line with general academy payment schedules).

9. Attendance and Engagement

Awards may be reviewed where attendance, engagement or participation causes concern. Individual SEND circumstances will always be considered.

10. Unspent funds and recycling

Bursary funding cannot be carried forward for more than one academic year. Where a student leaves their programme early, or does not receive their full award because they did not meet agreed conditions, the academy will recycle any unused defined vulnerable group bursary funding to support other eligible students, or, where no such student exists, return the funds to the DfE. Unspent discretionary bursary funds will be reported to the DfE via the customer help portal no later than 31 March each year, where required.

11. Appeals

Applicants may request a review of a decision. Stage 1: Review by Post 16 Assistant Head. Stage 2: Review by Headteacher. Decisions at Stage 2 are final.

12. Record Keeping

The school will maintain a bursary register recording applications, eligibility decisions, awards made and expenditure. Records will be retained in accordance with data protection requirements.

13. Monitoring and Governance

An annual summary of bursary expenditure and impact will be reported to the Local Governing Body (LGB) The policy will be reviewed annually to ensure compliance with current DfE guidance.

Appendix 1: Application Form

16-19 Bursary Application Form KQ – Fill in form

