



16-19 Bursary Fund Policy

September 2026

Key Contact Personnel in School

Nominated Member of Leadership Staff Responsible for the policy:
Sally Moor

Designated Safeguarding Lead: Sarah Costain

DPO: Sarah Costain

Date written: September 2026

Date reviewed: September 2027

Date agreed and ratified by Governing Body:

Date of next review: July 2027 or as guidance is updated

**This policy will be reviewed following any concerns and/or updates to
national and local guidance or procedure**

1. Introduction and Legal Framework

Five Acre Wood Special School ('the School') administers the 16 to 19 Bursary Fund in accordance with the Department for Education's 16 to 19 Bursary Fund Guide 2026 to 2027. This policy sets out how the School will operate both the defined vulnerable group bursary and the discretionary bursary for the academic year 2026 to 2027.

The School is a maintained special school in Kent. Funding claims for the defined vulnerable group bursary are submitted to DfE by Kent County Council on the School's behalf. The discretionary bursary allocation is received via Kent County Council and distributed to the School.

Policy Objective

This policy prioritises support for students' TRANSPORT COSTS, reflecting the rural catchment and dispersed geography of Five Acre Wood's student population. While all eligible participation costs may be considered, transport is the primary area of need identified by the School and will be weighted accordingly in the allocation of limited discretionary bursary funds.

2. Types of Bursary Available

2.1 Defined Vulnerable Group Bursary

Up to £1,200 per year is available for students who fall into one of the following four defined vulnerable groups AND who have an assessed financial need:

- Students who are in care (looked after by the local authority)
- Care leavers (who meet the 16 to 19 Bursary Fund definition — see Section 4)
- Students receiving Income Support or Universal Credit in their own right (because they are financially supporting themselves, and any dependent living with them)
- Students receiving BOTH Disability Living Allowance or Personal Independence Payment AND Employment and Support Allowance or Universal Credit — all benefits must be in the student's own name. Receipt of DLA or PIP alone does NOT qualify.

IMPORTANT: Meeting the criteria for a defined vulnerable group does not automatically entitle a student to £1,200.

All bursary awards are made on the basis of individual assessed need. The School must assess each student's actual participation costs and will only claim and provide the amount genuinely needed. Students with no financial need or participation costs will not receive a bursary payment, even if they meet a defined group criterion.

2.2 Discretionary Bursary

The discretionary bursary is available to students who do not fall into the defined vulnerable groups but who have a financial need that creates a barrier to participation. The School sets its own eligibility criteria for this bursary within the DfE's overarching rules.

Given the School's limited discretionary allocation relative to the level of need (particularly for transport), not all applicants who are eligible will receive the full amount they apply for. Awards will be prioritised according to the criteria in Section 5.

3. Eligibility: All Bursaries

3.1 Age

To be eligible, a student must be aged 16 or over but under 19 on 31 August 2026.

Students aged 19 and over may be eligible for the discretionary bursary only if they:

- Have an Education, Health and Care (EHC) Plan, OR
- Are continuing on the same study programme they began aged 16–18 (19+ continuers)

Students aged 19 and over are NOT eligible for the defined vulnerable group bursary.

In exceptional circumstances, where a student aged under 16 is already participating in a 16 to 19 funded study programme at the School (for example, a student with an EHC Plan who has been dual-registered or placed here early), the School may use its discretion to pay a bursary where there is a genuine financial need. This should be applied very sparingly and documented with a clear rationale retained for audit.

3.2 Eligible Provision

The student must be enrolled on a study programme that is:

- Subject to Ofsted inspection
- Funded by DfE directly or via a local authority, or otherwise publicly funded and leading to a qualification up to and including Level 3 accredited by Ofqual

Students on apprenticeship programmes or waged training are not eligible.

3.3 Residency

Students must meet the residency criteria set out in DfE funding rules for post-16 provision. Evidence of residency must be seen and retained.

3.4 Asylum-Seeking Students

Unaccompanied asylum-seeking children (UASC), as looked-after children, are eligible for the defined vulnerable group bursary ('in care') where they have a financial need. Support for accompanied asylum-seeking students must be in-kind (e.g. travel pass) — no cash payments may be made.

4. Defining Vulnerable Groups: Detailed Criteria

4.1 In Care

A student is 'in care' if they are looked after by a local authority on a voluntary basis (section 20, Children Act 1989) or under a care order (section 31, Children Act 1989). Written confirmation from the relevant local authority is required.

4.2 Care Leavers

A student is a 'care leaver' if they are:

- Aged 16 or 17: previously looked after for at least 13 consecutive weeks (or periods totalling 13 weeks) beginning after age 14 and ending after age 16, OR
- Aged 18 or over: looked after before turning 18 for at least 13 consecutive weeks (or totalling 13 weeks), beginning after age 14 and ending after age 16

A financial need assessment must be completed. Private fostering arrangements do NOT qualify.

4.3 Universal Credit / Income Support

The student must be receiving Universal Credit or Income Support in their OWN RIGHT because they are financially supporting themselves (and any dependent living with them). A copy of the UC/IS award notice must be provided. UC award notices may be a screenshot from the student's online account.

4.4 DLA/PIP + ESA/UC

The student must be receiving BOTH:

- Disability Living Allowance (DLA) OR Personal Independence Payment (PIP), AND
- Employment and Support Allowance (ESA) OR Universal Credit (UC)

All benefits must be received by the student in their own name. DLA or PIP alone is NOT sufficient.

5. Discretionary Bursary: Eligibility and Priority

5.1 Household Income Assessment

The discretionary bursary is focused on students with genuine financial need. Household income must be used to help establish eligibility. The School will assess household income using the following evidence:

- Universal Credit award notices (last 3 monthly statements)
- P60 or wage slips (last 3 months) for working households
- Tax credit or other benefit letters
- Self-employment accounts where applicable

Household Income Thresholds (Draft — For Discussion)

Priority Band A: Household income below £20,000 per year
— Maximum transport support, essential equipment considered

Priority Band B: Household income £20,001 – £30,000 per year
— Transport support considered, equipment by exception

Priority Band C: Household income £30,001 – £40,000 per year
— Transport support considered where travel costs are significant

NOTE: These thresholds are indicative and for discussion. The School has discretion to adjust based on available budget and actual levels of need.

5.2 Priority Areas for Discretionary Bursary Support

Given the limited discretionary bursary budget relative to demand, awards will be prioritised in the following order:

1. Transport costs to and from school (highest priority)
2. Essential course equipment, books, or specialist clothing required for the study programme
3. Other essential participation costs identified through individual assessment

5.3 Annual or Programme-Start Assessment

The School will conduct household income checks at the start of each academic year. Where a student is on a standard two-year programme, the School may exercise discretion to conduct a single check at the start of the programme, provided the student signs an annual self-declaration confirming their household circumstances have not materially changed. If circumstances change, the student must inform the School immediately.

6. Permitted Use of Bursary Funds

6.1 Eligible Costs

Bursary funds may be used to support:

- Daily travel to and from school (PRIMARY FOCUS at Five Acre Wood)
- Essential textbooks, course materials, and specialist equipment
- Specialist clothing required for the study programme (e.g. protective overalls)
- Clothing or footwear in exceptional circumstances where genuinely required to access education
- Top-up to Care to Learn childcare funding where costs exceed the Care to Learn weekly maximum (payable directly to the childcare provider only)

6.2 Ineligible Costs

Bursary funds CANNOT be used for:

- General living costs (rent, utilities, household bills)
- Non-essential extra-curricular activities
- Counselling, mentoring, extra tutoring, or pastoral services
- Replacing the Local Authority's statutory transport duty for 16–19 students (KCC Post-16 Transport Statement applies)
- Block/blanket subsidies for all students regardless of income

- Rewards or bonuses for attendance or achievement
- Laptop servicing or non-essential IT maintenance

6.3 Transport Support — Local Authority Interaction

KCC publishes an annual Post-16 Transport Statement. The School will review this statement each year and ensure that bursary transport support complements, not duplicates, any LA transport offer. Students must apply to KCC for any statutory transport entitlement before or alongside applying to the School's bursary.

Bursary transport awards will document how they sit alongside, and do not replace, any KCC provision.

7. How We Calculate Transport Awards

Transport support is based on actual assessed costs, linked to attendance, and calculated using the DfE-approved method:

Five Acre Wood Transport Bursary Calculation

1. EVIDENCE BASE: One receipt for one journey is retained as the base evidence.
2. ATTENDANCE RECORD: Student's expected attendance days per week are recorded.
3. CALCULATION: Single journey cost $\times$ days per week = weekly support amount.
4. PAYMENT: Calculated support is paid in regular instalments (recommended weekly).
5. ACTUAL ATTENDANCE: Payments are adjusted to reflect actual attendance.
Example: Journey costs £5.50 each way = £11.00 per day
Student attends 4 days per week = £44.00 per week transport support

Where a travel pass or concessionary ticket is more cost-effective, the School may purchase this directly (in-kind support) rather than paying cash.

8. Emergency Transport and Meal Support

In cases of severe hardship, the School may provide emergency transport or meal support without completing the full income and evidence assessment. This provision is TEMPORARY and applies to a very small number of students. The following conditions apply:

- A record of the number of students receiving emergency support is maintained
- The number of days emergency support is given is recorded
- The £ value given to each student and the reason are documented
- The student provides signed confirmation that they received the funding for travel or food
- A full bursary assessment is completed as soon as practicable — emergency support is not an ongoing arrangement

9. Payment Method

The School encourages in-kind payments wherever practicable, as these ensure bursary funds are spent for the intended purpose. Examples include:

- Bus passes or travel cards purchased directly by the School
- Taxi or transport vouchers
- Books and equipment purchased by the School and provided to the student

Where cash payments are necessary, they will be made by BACS transfer to the student's own bank account. Students must be 16 or over to open a basic bank account. Cash-in-hand payments are not made.

Payments will be made on a regular basis (weekly or fortnightly where possible) to help students manage their finances and to avoid large lump-sum payments.

10. Conditions of Award

Bursary payments are conditional on the student:

- Maintaining attendance in line with their agreed timetable. Where attendance falls below expected levels due to illness, disability-related absence, or other circumstances outside the student's control, the School will take this into account before considering any adjustment to bursary payments
- Engaging with the School in good faith in relation to the use of bursary funds. Note: the bursary fund must not be used as a disciplinary tool. Conduct matters are addressed through the School's separate behaviour and disciplinary procedures, not through the withholding of bursary payments intended to remove financial barriers to participation
- Using bursary funds only for the agreed purpose
- Providing receipts or evidence of expenditure when requested
- Returning any school-funded equipment at the end of their programme
- Notifying the School of any change in circumstances that may affect eligibility

Payments may be withheld if conditions are not met. The individual circumstances of the student will always be considered before payments are withheld.

Where a student who is receiving the discretionary bursary has an assessed need for meal support on days of attendance (for example, because their financial circumstances mean they cannot otherwise afford to eat during the school day), the discretionary bursary may be used to provide this. Any meal support must be based on assessed individual need, linked to attendance, and evidenced in the usual way.

11. Confidentiality

All bursary applications and awards are treated in strict confidence. Information about individual students' financial circumstances will not be disclosed to other students or to staff who do not have a professional need to know. Application materials will not identify students as bursary recipients in any public communication.

The School is committed to administering the bursary in a way that avoids stigma or embarrassment for applicants and recipients. Processes will be designed so that students

are not identifiable to peers as bursary recipients. In-kind support (such as bus passes or equipment) will be provided discreetly. The School will have regard to the Equality Act 2010 throughout the administration of this policy and will ensure that the application process does not, directly or indirectly, disadvantage students with protected characteristics.

12. Appeals and Complaints

Students or parents who are unhappy with the outcome of a bursary application or the management of the process should follow the School's Complaints Procedure. The School is responsible for the administration of bursary funding and all appeals are handled internally. DfE does not adjudicate on individual bursary decisions.

13. Funding Claims, Unspent Funds and Reporting

As a maintained special school, Five Acre Wood submits funding claims for the defined vulnerable group bursary through Kent County Council. The School must:

- Provide KCC with verified eligibility evidence and an assessed need amount before KCC submits a claim
- Align its internal assessment timelines with the three DfE funding claim windows set out below, ensuring all eligibility checks and needs assessments are completed in advance of each submission deadline:
 - Window 1: September – November 2026 (payment: February 2027)
 - Window 2: January – February 2027 (payment: April 2027)
 - Window 3: May – July 2027 (payment: September 2027)
- Report any unspent bursary funds (from 2024/25 and any earlier years not previously reported) to DfE via the customer help portal by 31 March each year. Bursary funding cannot be carried forward for more than one year. From 1 May 2027, any unspent vulnerable group bursary funds claimed but no longer needed may be transferred to the discretionary bursary allocation, or returned to DfE via the customer help centre.
- Retain all audit documentation for 6 years

14. Audit and Record-Keeping

The School maintains auditable records for all bursary awards including:

- Completed and signed application forms
- Household income evidence
- Evidence of actual financial need and participation costs
- Evidence of defined vulnerable group status (where applicable)
- Travel cost calculation worksheets
- Receipts (at minimum one receipt per journey type for ongoing travel costs)
- Attendance records linked to travel reimbursements
- Signed student agreement to conditions of award

Records are retained for a minimum of 6 years (hard copy or electronic).

15. Publication and Review

This policy is published on the School's website and is available to students and parents before and during the enrolment process. It is also shared with relevant partner agencies and Kent County Council.

The policy will be reviewed:

- Annually, at the start of each academic year when updated DfE guidance is published
- During the year if significant guidance changes are issued by DfE
- Following any audit findings that require policy adjustment

This policy complies with the Equality Act 2010. The School does not discriminate, directly or indirectly, on the basis of any protected characteristic when applying its bursary eligibility criteria.