



## 16-19 Bursary (Legacy) Scheme Policy 2026-27

|                              |                                                                                                              |             |
|------------------------------|--------------------------------------------------------------------------------------------------------------|-------------|
| <b>Policy Author / date:</b> | Chief Financial Officer                                                                                      | July 2026   |
| <b>Approved by / date:</b>   | Board of Trustees                                                                                            | 9 July 2026 |
| <b>Review period:</b>        | Annually, or sooner if new guidance or legislation is issued and/or a business need for review is identified |             |
| <b>Next review due:</b>      | July 2027                                                                                                    |             |
| <b>Version:</b>              | 1.2                                                                                                          |             |

| Current version | Previous version | Summary of key change(s) since last version:                                        |
|-----------------|------------------|-------------------------------------------------------------------------------------|
| 1.2             | 1.1              | Changed reference to DfE guide 2026 to 2027                                         |
|                 |                  | Changed dates to relevant academic year                                             |
|                 |                  | Section 4 re clarification of students for whom this policy will now apply          |
|                 |                  | Section 6 changing eligibility criteria for discretionary bursary                   |
|                 |                  | Section 12 changes to costs covered                                                 |
| 1.1             | 1.0              | Addition of section 14: young carers (approved December 2025)                       |
| 1.0             | N/A              | New policy (see also 16-19 Bursary (Pilot) Scheme Policy) (approved September 2025) |
|                 |                  |                                                                                     |
|                 |                  |                                                                                     |

## Contents

|     |                                                             |    |
|-----|-------------------------------------------------------------|----|
| 1.  | Aims of the policy .....                                    | 3  |
| 2.  | Guidance.....                                               | 3  |
| 3.  | Roles and responsibilities .....                            | 3  |
| 4.  | When is a student eligible for the 16 – 19 Bursary? .....   | 4  |
| 5.  | Vulnerable Bursary (V1).....                                | 5  |
| 6.  | Discretionary Bursary .....                                 | 5  |
| 7.  | Required evidence to support applications .....             | 6  |
| 8.  | Making an application and by when.....                      | 7  |
| 9.  | Changes in circumstances .....                              | 8  |
| 10. | Inaccurate or fraudulent applications.....                  | 8  |
| 11. | Appeals process .....                                       | 8  |
| 12. | When and how will a student be able to access funding?..... | 8  |
| 13. | Monitoring arrangements .....                               | 10 |
| 14. | Young carers .....                                          | 10 |

## **1. Aims of the policy**

- Provide staff, parents/carers and students with 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 conditions for receiving the funds.

## **2. Guidance**

This policy is based on the [Department for Education \(DfE\) 16 to 19 Bursary Fund guide: 2026 to 2027](#) ("the DfE guide").

## **3. Roles and responsibilities**

### **The Executive Headteacher / Principal**

Implementation of this policy has been delegated to the Executive Headteacher and Principal of the academies with 16-19 provision. The Executive Headteacher / Principal is responsible for ensuring staff are familiar with this policy and that it is being applied consistently. They will work with the local authority's Virtual School and care leavers' service to encourage pupils to apply who are eligible for a bursary.

### **The Deputy Principal: Post 16** will be responsible for:

- the day-to-day management of the policy and the systems required for its effective implementation, supported by Sixth Form leaders and tutors;
- assessing eligibility for an award from the Bursary Fund;
- processing the claim;
- monitoring and managing awards provided for defined vulnerable group bursaries to enable funding to be claimed from the DfE, as appropriate;
- maintaining records in accordance with the requirements of this policy and the DfE guide;
- storing and processing confidential data in line with the Trust's Data Protection and Records Retention policies.

### **The Finance Team** is responsible for:

- the processing of any payments of any bursaries/reimbursements approved by the Deputy Principal: Post-16;
- the processing of the purchase of any goods or services that are deemed appropriate to support the study of individual students;
- processing claims to the DfE for funding for defined vulnerable group bursaries;

- undertaking a financial reconciliation at the end of the financial year and returning unspent bursary funding to DfE in accordance with the guidance;
- storing and processing confidential data in line with the Trust's Data Protection and Records Retention policies.

**Students** are responsible for:

- determining whether or not they may be eligible for the 16 to 19 bursary;
- completing the 16 to 19 Bursary Application form;
- where appropriate, providing evidence of income, benefits or circumstances as determined by the eligibility criteria;
- agreeing with the Deputy Principal: Post 16 in advance whether an item or service can be purchased through the Bursary Fund;
- providing receipts for goods or services purchased when requested to do so;
- setting up a personal bank account and providing the details when requested to do so;
- using any bursary funds provided only for the purpose for which they have been provided;
- informing the Deputy Principal: Post 16 immediately of any changes in circumstances that may affect entitlement to the Bursary.

#### **4. When is a student eligible for the 16 – 19 Bursary?**

##### **Introduction**

The bursary fund is intended to help students with the essential costs of participating in their study programme, to help with the cost of essential books or equipment or with the cost of travelling to the academy, for example. The bursary fund is not intended to support costs not related to education (living costs), extra-curricular activities or provide learning support or other services that institutions give to students – such as counselling, mentoring or extra tutoring.

There are two types of 16-19 Bursary; a Vulnerable Bursary and a Discretionary Bursary. To be eligible to receive either of these Bursaries a student must be aged over 16 and under 19 on 31 August 2026.

Both types of bursary funding are designed to help students overcome the individual financial barriers to participation they face; therefore, funds must only go to those who genuinely need them.

This policy will apply only to legacy claimants of the bursary on roll in Year 13 or 14 at Jesmond Park Academy and Year 14 at Gosforth Academy. Such claimants will be paid according to the conditions of the previous 16-19 Bursary Scheme (Legacy) policy for the academy year 2025-26. New bursary claimants in Year 12 or 13 at Gosforth Academy and Year 12 at Jesmond Park Academy will receive support according to terms and conditions of the bursary policy for new applicants.

Should a student qualify, they will need to apply by completing the Bursary Application form. This information can be found on the Academy website under the "Sixth Form" tab, within the "Student Support" section.

All applications will be treated confidentially.

## **5. Vulnerable Bursary (V1)**

Students in the defined vulnerable group are eligible for a bursary of up to £1,200 per year and should be in one of the following:

- young person in care, including unaccompanied asylum-seeking children;
- young care leaver;
- receiving Income Support (IS), or Universal Credit (UC) 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;
- receiving Disability Living Allowance (DLA) or Personal Independence Payments (PIP) in their own right as well as Employment and Support Allowance (ESA) or UC in their own right (If a student is a parent they will also need to be living away from their own parents to qualify.)

To apply for this level of support, a student will need to provide evidence in written form, unless the school is already in possession of relevant information.

Suggested forms of evidence include:

- A letter from the Department for Works and Pensions (DWP) setting out the benefits to which you are entitled
- Written confirmation of current or previous looked after status from the relevant local authority, or the one that provides other leaving care services.

## **6. Discretionary Bursary**

Discretionary bursaries are aimed at students who would not be able to stay in education without financial help. There are two types of Discretionary bursary, D1 & D2.

A student will qualify for the **D1 Discretionary bursary** if:

- they are in receipt of Free School Meals (FSM) and their household income does not exceed £35,000 pa.

To qualify for free school meals a recipient first needs to apply to Newcastle City Council at:

[Apply for free school meals Newcastle City Council](#)

After this form is completed online, the City Council will notify the academy of participation. The local authority regularly reassesses entitlement to free school meals. If a student becomes ineligible for free school meals this will usually mean they are no longer eligible for the D1 Discretionary Bursary.

A student will qualify for the **D2 Discretionary bursary** if:

- they are not in receipt of Free School Meals (FSM) but their household income does not exceed £35,000 p.a.

or

- they are a young carer.

or

- there are exceptional circumstances

To claim for the **D2 bursary** students should speak to the Sixth Form Team if they think they may be eligible for this. Typically, D2 bursary will only be paid to students living in households where the annual income does not exceed £35,000.

## **7. Required evidence to support applications**

Applications for V1 and D2 bursaries will need to be accompanied by evidence from the student/their parents/carers, unless the school is already in receipt of relevant information, such as care leaver status.

### **Vulnerable Bursary (V1)**

- proof of being a Child in Care or a Care Leaver (if necessary)
- young person in receipt of Income Support or Universal Credit in their own name
- young person in receipt of either Disability Living Allowance (DLA) or Personal Independence Payment (PIP) in the student's own name and Employment Support Allowance or UC in the student's own name.

### **Discretionary Bursary (D1)**

There is no need to provide evidence for the D1 bursary, as this is information that is automatically shared with the academy.

### **Discretionary Bursary (D2)**

- current up to date Universal Credit Notice (showing the total household income, as evidenced by the three most recent monthly UC Award statements)

or

- evidence of household benefits assessed by HMRC (e.g. Tax Credit Awards, Child Tax Credits or Income Support) Please ensure that the documentation shows the household income

or

- household wage slips covering the most recent three-month period.

An application for any bursary should state the expenses/items financial support is needed for. These may include: transport costs to and from academy; books, supplies or equipment for courses; trips, visits and activities as part of the course; university open days and interviews; or any other costs related to their studies.

Should other costs arise during the course of the year, these can still be claimed for providing they meet the criteria.

The maximum claim for a single item is capped at £500. A claim for any single item above £500 would require a written request to the Deputy Principal: Post 16 for consideration.

#### **In order to receive financial support students must:**

- meet academy expectations in terms of conduct, progress in the programme of study and attendance
- maintain an attendance threshold as detailed below
- attend any examinations they are entered for
- have completed the 16-19 Bursary Application form, which includes agreeing to the 16-19 Bursary Student Agreement
- adhere to all elements of the Contract and Entitlement Criteria.

These aspects will be reviewed throughout the year, using an academic tracking system, Tutor and Teacher concerns, as well as attendance analysis.

The bursary payment will not usually be made should attendance levels drop below 85%. Individual circumstances will be taken into account and discussed with the student in advance.

## **8. Making an application and by when**

Application forms are available online on the academy website. These should be completed and returned along with all supporting evidence no later than 30 September 2026.

We are aware that personal circumstances may change during the year, and an application after this date may need to be made. Students should be advised however, that late applications may mean reduced funds.

Should an applicant need any further guidance, they should contact a member of the Sixth Form Team.

## **9. Changes in circumstances**

The academy will be advised of any change in FSM eligibility; however, it is the responsibility of students to inform the Sixth Form Team of any changes in circumstances that may affect entitlement to the Bursary. Failing to do so, may result in a clawback of funding.

## **10. Inaccurate or fraudulent applications**

By completing the application form, a student agrees that the information and evidence provided in support of the application is correct and complete to the best of their knowledge.

False information given may mean that payments will cease, and that any overpayments will be recovered. Fraudulent applications will be investigated and referred to the Principal / Executive Head and Chief Executive Officer.

## **11. Appeals process**

If a student believes they should be entitled to a bursary but have not been awarded one, they should first approach the Deputy Principal: Post 16. If they, or their parent / carer wishes to appeal against the decision of the Deputy Principal: Post 16, they should do so in writing to the Executive Headteacher / Principal.

## **12. When and how will a student be able to access funding?**

When a claim has been approved, depending on the nature of the application, a student will receive:

### **Vulnerable Bursary Students:**

A payment of £1,200 paid in monthly instalments in arrears during term time.

### **Discretionary Bursary Students (D1 and D2):**

- A regular monthly payment of £10.00 per week paid over a 36-week period in Year 13.

Both the Vulnerable and Discretionary Bursary payments are intended to cover the following costs:

- Transport costs to academy

- Books, supplies and resources required for the programme of study
- Equipment required for the programme of study, including specialist clothing or protective equipment
- Field trips and other course-related costs
- The costs of attending university interviews and open days, including a Young Person's Railcard when necessary
- The costs of attending events to support future pathways, e.g. attendance at employment fairs and events or interviews
- Items relating to securing progression to university, apprenticeships, employment or further study,
- Locker key deposit

In addition, as and when necessary, we will provide the following:

- Cover of the costs of any re-sit or re-marks of external examinations, at the discretion of the Deputy Principal: Post 16
- Cover of the cost of the UCAS application or application to other higher education institutions, if this cost is not automatically covered by being on FSM.

Any costs not listed above, which are financial barriers to participation, will be at the discretion of the Deputy Principal: Post-16 and determined on an individual basis.

Records of all decisions will be maintained for audit purposes.

A bursary will not be awarded if a student does not have any actual financial need (for example, because their financial needs are met from other sources and/or because there are no relevant costs). When calculating needs, cases will be looked at individually and the outcome based on the particular student's needs.

We will use our discretion, on a case-by-case basis, and provide more than the equivalent of £1,200 per year if this is necessary for a student to remain in education. Any such additional payment will be paid from our discretionary bursary allocation.

Where academy staff deem that an additional cash payment direct to the pupil might be appropriate in some circumstances, pre-authorisation must be sought from the

Deputy Principal: Post-16 and a copy of the receipted evidence must be provided. Expenditure will only be reimbursed once the pupil has had confirmation of entitlement to a bursary. Any expenditure incurred without notification or approval from the Deputy Principal: Post 16 is done so at financial risk to the student.

We will also consider the number of hours involved in a student's study programme when deciding whether a pro-rata payment is more appropriate. We will review a student's eligibility each academic year; they will only continue to receive a bursary if they remain eligible.

Students should see the Post 16 Bursary Application form for more information. This information can be found on the Academy website under the "Sixth Form" tab, within the "Student Support" section.

### **13. Monitoring arrangements**

The Board of Trustees has overall responsibility for this policy. Monitoring the implementation and effectiveness of this policy has been delegated to the Finance and Premises Committee.

This policy will be reviewed on an annual basis in line with the receipt of any revised guidance from the DfE.

General information on 2026-27 bursary schemes is available on the [GOV.UK website](https://www.gov.uk).

### **14. Young carers**

Young Carers might be eligible for a Discretionary Bursary.

#### **Eligibility**

In order to be eligible to apply, a Young Carer will attend sixth form and will be registered as a Young Carer with Newcastle Carers. They will have to be able to demonstrate that their finances are impacted upon as a result of caring for someone alongside taking part in learning.

If a Young Carer is not registered with Newcastle Carers, they can get in contact with [Newcastle Carer](#) who can support them in their caring role. The academy will support them with this.

#### **Application**

A Young Carer should complete the Sixth Form Bursary Application Form as outlined in the policy. In their application they will have to describe the caring responsibilities they have for a family member or other identified individual and demonstrate how their finances are impacted upon because of their caring responsibilities.

#### **Accessing funding**

If they are accepted, they will need to provide evidence of costs, such as travel costs. They will also receive the package of support that other Discretionary Bursary students receive, as outlined in the policy.

| Section                               | Item                                                                                                                                                   | Responsibility | Completed? |
|---------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|------------|
| Eligibility: All Bursaries            | Student meets the age criteria.                                                                                                                        |                |            |
| Eligibility: All Bursaries            | Eligible education provision.                                                                                                                          |                |            |
| Eligibility: All Bursaries            | Student meets the residency criteria for post-16 provision.                                                                                            |                |            |
| Eligibility: All Bursaries            | Evidence of eligibility has been retained.                                                                                                             |                |            |
| Bursary for defined vulnerable groups | Student falls within one of the defined vulnerable groups for example, in receipt of the specified benefits in their own right or in care/care leaver. |                |            |
| Bursary for defined vulnerable groups | Financial needs assessment carried out to confirm financial need and actual costs they have. No student should automatically receive £1,200.           |                |            |
| Bursary for defined vulnerable groups | Appropriate evidence seen and copies retained to confirm student's eligibility, including the letter to support in care.                               |                |            |
| Bursary for defined vulnerable groups | Support awarded in kind (bus pass, meal vouchers, books or equipment purchased on student's behalf). Receipts should be retained.                      |                |            |
| Bursary for defined vulnerable groups | Letter issued to student confirming the amount of support, what support will be made in-kind and payment conditions.                                   |                |            |

|                       |                                                                                                                                                                                                                |  |  |
|-----------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|--|
| Discretionary bursary | Evidence to confirm the student meets the institution's bursary fund criteria, including household income and statement of actual participation costs.                                                         |  |  |
| Discretionary bursary | Evidence of income and overall eligibility obtained, and copies retained.                                                                                                                                      |  |  |
| Discretionary bursary | Assessment of student's actual financial needs carried out. Block, blanket or flat rate payments are not permitted – the financial support from bursary funds should reflect the actual costs the student has. |  |  |
| Discretionary bursary | Support awarded in kind (bus pass, meal vouchers, books or equipment purchased on student's behalf). Receipts should be retained.                                                                              |  |  |
| Discretionary bursary | Letter issued to student confirming the amount of support, what support will be made in-kind and payment conditions.                                                                                           |  |  |