INVICTUS

Education Trust

16 – 19 Bursary Fund Policy

2026-27

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Document Control and Version Control

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Invictus Education Trust

16-19 Bursary Fund Policy

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Our Mission, Vision and Values

Mission
'Excellence every day, unlimited ambition and transforming lives'

Vision
'To create a community of inclusive schools where people choose to learn with us, work with us and belong with us, so that everyone succeeds'

Values
- Respect
- Resilience
- Relationships

What is the 16 to 19 Bursary Fund?

The 16 to 19 Bursary Fund is made available from the Department for Education (DfE) and provides financial support to help students overcome specific financial barriers to participation so they can remain in education.

The Trust's policy has been developed in line with the DfE guidance to ensure that all students are treated in a fair and consistent way.

Who is Eligible?

There are two types of 16 to 19 bursaries and a student must be aged 16 or over but under 19 at 31 August 2026 to be eligible for help from the bursary fund in the 2026 to 2027 academic year:

Students aged 19 or over may be eligible for a discretionary bursary where they have an Education, Health and Care (EHC) plan or are continuing on the same study programme they began when aged 16 to 18 (19+ continuers). Students aged 19 or over are not eligible for a bursary for defined vulnerable groups. Students must also meet the residency and eligible education provision requirements set out in the DfE funding rules for post-16 provision.

- bursaries for defined **vulnerable** groups of up to £1,200 a year;
- **discretionary** bursaries which the Trust awards to meet individual needs, for example, help with the cost of transport, meals, books and equipment.

Grant Funding Available

- The Vulnerable bursary grant is claimed directly from the Department for Education through DfE Sign-in at prescribed claim points during the academic year. Claims must only be submitted once the Trust has verified that the student meets the defined vulnerable group eligibility criteria and has assessed and evidenced the student's actual financial need. The amount claimed must reflect the student's actual participation costs and must not automatically be £1,200. The Trust will comply with the claim windows and deadlines published by the DfE for the relevant academic year.
- The **Discretionary** bursary grant is allocated to the Trust by the annual 16-19 formulaic bursary grant awarded from the DfE (formally ESFA). This is a finite allocation for the Trust to distribute in line with the policy.
  The Trust will set aside 20% of the 16-19 Discretionary Bursary amount provided to accommodate changes in circumstance and ensure that requests for funding from students received after 31 December can be accommodated.
  In cases of severe hardship, the Trust may use the discretionary bursary to provide temporary emergency meal or travel support on days when a student attends their study programme before the usual household income and evidence checks are completed. A full discretionary bursary assessment must subsequently be completed and the Trust will retain the records required by DfE for audit purposes.

Eligibility Criteria: Group 1
Bursaries for young people in defined Vulnerable groups
The defined vulnerable groups are students who are:

- in care;
- care leavers;

- 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.

The bursary for vulnerable groups can pay up to £1,200 per year to a student participating on a study programme that lasts for 30 weeks or more where assessed actual participation costs require this level of support. For study programmes of less than 30 weeks, the amount awarded will reflect the Trust's assessment of the student's actual financial need, the length and hours of the study programme and evidenced participation costs.

Definitions of students in Vulnerable Groups can be found in the DfE guidance.

Pro-rata Bursaries for Vulnerable Groups

The Trust may decide that although a young person may be eligible for a bursary because they are in one or more of the defined vulnerable groups, they do not have any actual financial need. This might be because their financial needs are already met and/or because they have no relevant costs. The Trust can refuse a student's application on this basis. Similarly, students should only receive the amount they actually need to participate and not automatically receive £1,200 if they do not need the full amount. Equally, the Trust can pay a bursary to a vulnerable group student of more than £1,200 if they assess they need extra help to remain in education. Any payments over £1,200 must be paid from the Trust's discretionary bursary allocation or from their own School budget funds.

Evidence of Eligibility

Institutions must obtain proof that students are eligible for a bursary for **vulnerable** groups in full and will retain copies for audit purposes. For example:

- for students who are in care or a care leaver, written confirmation of their current or previous looked-after status from the relevant local authority - this is the local authority that looks after them or provides their leaving care services. The evidence could be a letter or an email but must be clearly from the local authority.
- for students in receipt of IS or UC, a copy of their IS or UC award notice. This must clearly state that the claim is in the student's name/confirm they are entitled to the benefits in their own right. The evidence must not state any conditions that prevent them from participating in further education or training. For students in receipt of UC, institutions must also see a document such as a tenancy agreement in the student's name, a child benefit receipt, children's birth certificates, utility bills and so on.
- for students receiving UC/ESA and Disability Living Allowance (DLA) and Personal Independence Payments (PIP), a copy of their UC claim from DWP. Evidence of receipt of DLA or PIP must also be provided.

UC claimants should be able to print off details of their award from their online account or provide a screenshot to the institution.

Eligibility Criteria: Group 2

Discretionary Bursaries

If your total household income is below £36,750 you will be able to apply for consideration for a bursary award. Meeting the household income threshold does not automatically result in an award. All awards will be based on an individual assessment of the student's actual financial barriers to participation and evidenced participation costs. Evidence of household income will be required and may include:

- P60 or 2 months' pay slips or 4 weekly slips dated within 3 months (take home pay figure is used);
- Most recent audited accounts or official tax return showing self-employed income;
- Pension – current official letter or statement showing ongoing pension income;
- Universal Credit – all pages of the latest 3 monthly award statements showing earnings and Universal Credit for each assessment period;
- Council Tax Reduction or Rent Rebate – current official letter showing ongoing benefit;

- Tax credits – current award notice or bank statements showing 3 consecutive payments dated within 3 months, where applicable;
- Child Benefit – current official letter showing ongoing benefit or bank statements showing 3 consecutive payments dated within 3 months;
- Other Income or Benefits – please specify.
- Exclusions – income earning from siblings of the post 16 student living within the household will be excluded for the calculation of household income

A bank statement is required to evidence the income paid in respect of the above.

The Trust can now exercise discretion as to whether the checks on household income are made annually or just once at the beginning of a student's study programme. If, in the interests of efficiency and speed in considering the application, the Trust decide not to conduct annual checks of household income eligibility, the Trust must ensure a signed and dated (hard copy or electronic) self-declaration form is obtained from the student to confirm that their household circumstances have not changed.

Irrespective of whether household income is checked annually or once at the beginning of the study programme, the Trust will assess and evidence the student's actual financial need and participation costs each academic year. The Trust will not make blanket, flat-rate or fixed payments solely because a student meets an eligibility criterion or falls within a particular household income band.

The application will be considered by the Schools Bursary Committee during the first term of the academic year therefore claims must be submitted by **31 October for consideration**. Any ad hoc claims after this date will be considered on the basis of the 20% funds remaining and on a first come first served basis. Students and their parents/carers should understand that the available fund is limited.

The Bursary Committee is made up of the Head of Sixth Form, Finance Officer and Sixth Form Administration. The Head of Sixth Form will offer information to the Committee about a student's circumstances, well-being, behaviour, progress and attendance, if required.

What can the Bursary Fund be Used for?

- Books/materials/equipment
- Free/subsidised school meals normally taken in school
- Essential field trips and enrichment activities where these are directly linked to the student's study programme goals or course objectives
- UCAS fees and University open day visits
- Essential or specialist clothing or footwear where this is genuinely and directly required to enable the student to access or participate in their education
- Other items relevant to the individual student, this can include sportswear if appropriate to students post 16 course
- Travel – help with transport costs.

What the Bursary Fund Cannot be Used for

The bursary fund cannot be used to provide learning support or pastoral services such as counselling, mentoring or extra tutoring; service laptops or tablets; support extra-curricular or field-trip activities that are not essential to the student's study programme goals or course objectives; support general household income or living costs such as rent, bills or Wi-Fi; or replace a local authority's statutory transport duty for students aged 16 to 19. Overseas field trips should not be supported where equivalent study programme content can be accessed in England at a significantly lower cost.

Conditions for Receiving Bursary Funding

Bursary support may be made conditional on the student meeting agreed standards of attendance and behaviour. Any such conditions will be clearly communicated to the student. Where conditions are not met, the Trust will consider the student's individual circumstances before deciding whether to withhold future payments or support.

How to Make a Claim?

To make a claim, complete the application form of this Policy at:

- Appendix 1 and 3 for Group 1 Vulnerable bursary; or
- Appendix 2 and 3 for Group 2 Discretionary bursary.

Notification of Qualification for the Bursary

Students will receive a letter or email confirming receipt of their application to the '16-19 Bursary Fund' along with the support allocation awarded by the Bursary Fund Committee and, if appropriate, a payment scheme.

Paying Bursary Funding to Eligible Students

The DfE encourages institutions to pay bursaries in-kind rather than cash as far as possible and does not recommend that large or lump sum bursary payments are made to students. Any bursary payments made to you will be by BACS and outlined in detail when the award is made.

Bank details must be in the student's name.

Appeals

Any student wishing to appeal against the Support Level allocated should do so in writing within two weeks of receiving their letter of Support Allocation. Appeals should be made to the school's Sixth Form Administrator. It is expected that further evidence to support the funding request will be provided by the student if called upon. Where the matter cannot be resolved through the bursary appeal process, the student or parent/carer may use the Trust's published Complaints Policy.

Administration Contribution

The school is permitted to use up to 5% of their allocation for administrative costs.

Recovering Funds Due to Fraud

This Trust is responsible for investigating instances of fraud relating to bursary fund applications. Significant fraud involves one or more of the following:

- the amount of money is over £1,200;
- the particulars of the fraud are novel, unusual, systemic or complex;
- there is likely to be great public interest because of the nature of the fraud or the people involved.

Rules on Unspent Bursary Funds

The DfE permits institutions to carry forward unspent bursary funding for one academic year only. Any funding carried forward must continue to be used solely for eligible bursary or free meal support in accordance with DfE funding rules and cannot be transferred to general Trust funds. Funding that remains unspent beyond the permitted one-year carry-forward period must be reported to DfE as soon as identified and no later than 31 March each year and will be subject to recovery.

Audit, Assurance and Fraud

16 to 19 Bursary Funds are subject to normal assurance arrangements for 16 to 19 education and training. The Trust will retain copies of any documents the student has signed to give formal agreement to their conditions for payment. Receipts and other evidence of actual expenditure form part of the audit trail. For recurring costs such as travel or food, where retaining a receipt for every transaction is impractical, the Trust may evidence the unit cost initially and use an auditable calculation linked to the student's expected and actual attendance to determine reimbursement.

Hard or scanned copies of documentation will be retained for 6 years. This includes the application form and the household income evidence.

Examples of documentation include:
For the bursary for vulnerable groups:

- copy of the funding claim submitted directly to DfE through DfE Sign-in.
- evidence showing that the student is eligible, for example, a letter from DWP or the local authority or a copy of the student's online UC statement.
- evidence of payments received from DfE, for example bank statements and remittance advices.
- a copy of the student's individual assessment of actual financial need.
- evidence of payments or support provided in-kind to the student.

For the discretionary bursary:

- evidence used to assess eligibility and determine household income, such as P60's, self-employment accounts, wage slips, a letter from DWP, copies of online statements for UC.
- a copy of the student's individual assessment of actual financial need, including the calculation that has determined the amount awarded.

Receipts for purchases made by students, for example, bus pass, lunch receipts or book receipts, or support provided by the institution in-kind to the student.

Appendix 1

16 to 19 Bursary Fund Application - Group 1: Vulnerable Bursary Application

Please read the Trust's Bursary guidance carefully before completing and submitting your application.

Group 1 (Section A) to be completed by the student

Vulnerable Group Bursary - for looked after students, those in care, care leavers, students receiving Income Support (or Universal Credit) in their own name and disabled students in receipt of both Employment Support Allowance and Disability Living Allowance (or Personal Independence payments).

Please note: meeting one of the defined vulnerable group eligibility criteria does not automatically entitle a student to a bursary payment of £1,200, or to any payment. The Trust must assess the student's actual financial need and participation costs. Where those costs are already met or there is no identified financial need, a zero bursary award may be made.

Section A			
Students full name:		Tutor Group	
Invictus School registered at:			

Students full address: Including Post Code	
Contact telephone number:	
Email address	

I wish to claim support from the 16 to 19 **vulnerable bursary fund**, and I provide the following information as evidence of my personal circumstance (please tick as appropriate and attach documentary evidence)	
	Tick as appropriate
Written Local Authority evidence of looked-after or care status.	
HMRC evidence e.g. Tax credits award, Pension credits and Universal credits.	
Employment Support Allowance, Job Seekers & Income Support in my own name combined with Disability Living Allowance or Personal Independence Payments.	
Housing Benefit.	
Information provided is for this purpose only and will be treated in the strictest confidence.	
I confirm that I have read the Trust's attached guidance, and the information provided on this form is correct. **I understand that any false information given, or failure to notify the Sixth Form administrator of a change in personal circumstances, will result in disqualification of support.**	
Student signature:	Date:
Parent/Guardian signature:	Date:

Group 1 (Section B) to be completed by Sixth Form Bursary Fund Administrator

Section B	
I have seen the evidence required for the full bursary and have placed copies on the students files	
Award Approved/amount £	Date

Actions agreed to re-imburse the Student	
Administrator Name & signature:	Date:
Finance authorisation:	Date
Bursary Committee members in attendance/Head of 6th form Approval:	Date of meeting/approval

Appendix 2

16 to 19 Bursary Fund Application - Group 2: Discretionary Bursary Application

Please read the Trust's Bursary guidance carefully before completing and submitting your application. **Group 2 (Section C) to be completed by the student**

Discretionary bursary for students from households with a total household income below £36,750. Meeting the household income threshold establishes eligibility to apply for support but does not automatically result in an award. All awards are subject to an individual assessment of the student's actual financial need and evidenced participation costs.

Section C			
Students full name:		Tutor Group	
Invictus School registered at:			
List the Invictus Schools attended for lessons (this is needed for free school meals allowance)			
Students full address:			
Contact telephone number:			
Email address			
I wish to claim support from the 16 to 19 discretionary bursary fund, and I provide the following information as evidence of my personal circumstance (please tick as appropriate and attach documentary evidence).			

	Tick as appropriate
Bank statement to support the income paid in respect of the below, where applicable.	
P60 or 2 months' pay slips or 4 weekly slips dated within 3 months (take home pay figure is used)	
Most recent audited accounts, official tax return or other appropriate evidence showing self-employed income.	
Pension – current official letter or statement showing ongoing pension income.	
Universal Credit – all pages of the latest 3 monthly award statements showing take-home pay and Universal Credit received for each assessment period.	
Council Tax Reduction or Rent Rebate – current official letter or statement showing ongoing benefit.	
Tax credits – current award notice or other appropriate evidence of ongoing tax credit income, where applicable.	
Child Benefit – current official letter, statement or bank statements showing ongoing payments.	
Other Income or Benefits – please specify	
Information provided is for this purpose only and will be treated in the strictest confidence	
Please detail what financial support you need and the costs applicable to the best of your knowledge when submitting the claim	**Cost**
Total costs applicable	£

NB***: For audit purposes all receipts/invoices, etc must be filed with this claim to verify payment.***

I confirm that I have read the attached guidance, and the information provided on this form is correct. I understand that any false information given, or failure to notify the Sixth Form administrator of a change in personal circumstances, will result in disqualification of support. I understand that I may have to repay part or all of this assistance offered if my attendance, conduct or progress is not satisfactory.

Student signature:	Date:
Parent/Guardian signature:	Date:

Group 2 (Section D) to be completed by Bursary Fund Administrator

I have seen the evidence required for the full bursary and have placed copies on the students' files	
Award Approved/amount £	Date:

Actions agreed to re-imburse the student	Date:
Administrator name & signature:	Date:
Finance authorisation:	Date:
Bursary Committee members in attendance/Head of 6th form Approval:	Date:

Appendix 3

16 to 19 Bursary Fund Application - Group 1 & 2 Applications – Bank Account Details

Groups 1 & 2 (Section E) to be completed by the student

Section E: Student Bank/Building Society Details

To receive payments, you must have a bank account in your own name. If you do not have a bank account, you need to open one before completing this form.

Name of Account Holder: ……..
Name of Bank: ……
Branch Address: ……
Account Number: ……..…… Sort Code: ……..

Please note that if your application for the 16 to 19 Bursary Fund is unsuccessful these details will be shredded. For those that are successful, these details will be kept securely and confidentially.

Appendix 4

Notification of a Bursary Award Determination for the Academic Year 2026-27

Students Name: _____
Students School of Registration: _____
Date of Application: _____
Date Approved or Declined (please specify): _____
Bursary Request Category – please highlight • Vulnerable • Discretionary

Information Regarding Support Approved for 2026-27 Academic Year	Cost
Total costs applicable	£

Information Regarding Support Declined for 2026-27 Academic Year	Reason

For further information please contact the schools Post 16 Administrator.