



16–19 Bursary Fund Policy

Applies to:	Fortis Academy
Staff member responsible:	School Business Manager
Website:	On public website
Approval by:	The Academy Council
Review frequency:	Annually or sooner if ESFA guidance changes
Date of approval:	October 2025
Date of next review:	October 2026

Introduction:

The 16–19 Bursary Fund is provided by the Education and Skills Funding Agency (ESFA) to support students who face financial barriers to participation in education. This policy sets out how Fortis Academy administers the 16–19 Bursary Fund in line with ESFA guidance and Trust financial regulations.

The policy applies to all eligible students aged 16 to 19 and covers both discretionary bursaries and vulnerable student bursaries.

Aims of the Policy:

Fortis Academy aims to:

- Remove financial barriers to participation in education
- Ensure bursary funding is targeted at students who need it most
- Administer the bursary fund fairly, consistently, and transparently
- Ensure full compliance with ESFA guidance and audit requirements

Types of Bursary Available:

Fortis Academy offers two types of bursary support through the 16–19 Bursary Fund. All awards are subject to available funding and assessment of individual need.

Vulnerable Student Bursary (High Level):

Students may be eligible for a vulnerable student bursary of up to £1,200 per academic year if they meet one or more of the following criteria:

- Currently in care or a care leaver, as confirmed by the local authority
- In receipt of Income Support or Universal Credit in their own name
- In receipt of both Disability Living Allowance (or Personal Independence Payment) and Employment and Support Allowance

These students are considered financially independent and eligible for higher level support. Awards are based on actual need up to the maximum amount and are not automatically paid in full. Payments are made via BACS following submission and approval of bursary claim forms for eligible expenditure.

Discretionary Bursary:

Discretionary bursaries are available to students who do not meet the vulnerable criteria but who face genuine financial barriers to participation in education. Awards are made at the discretion of the school and are not an entitlement.

Discretionary bursaries are assessed based on household income and individual circumstances and may include:

Medium Level Bursary (up to £600 per academic year):

- Household income below £28,000, with priority given to students eligible for free school meals

Low Level Bursary (up to £360 per academic year):

- Household income between £28,000 and £33,000

Additional Discretionary Payments:

- Additional payments may be awarded to any student facing significant financial barriers to learning, subject to available funding and authorisation by the Associate Assistant Headteacher (Director of Sixth Form) and the School Business Manager.

The actual level of award is dependent on assessed need, the number of applications received, and the funding available.

Eligibility and Assessment of Need:

All applicants must:

- Be aged 16–19 on 31 August of the academic year
- Be enrolled on an eligible course
- Meet residency and funding criteria as set out by the ESFA

Applicants must provide evidence to demonstrate financial need. This may include:

- Proof of household income or benefits
- Evidence of other financial support received

Applications are assessed to ensure bursaries are awarded only for essential education related costs, including:

- Transport
- Meals
- Course equipment and books
- Uniform
- Educational visits

Any other allowances or financial support are taken into account to avoid duplication of funding.

Application Process:

Students must complete a bursary application form and submit it with supporting evidence to demonstrate eligibility and financial need.

To be eligible, students must:

- Be aged 16–18 on 31 August of the academic year
- Be enrolled on a full-time or part-time further education programme funded by the ESFA

Applications should normally be submitted by the published deadline (for example, early October) to enable timely support. However, applications may be accepted throughout the academic year to reflect changes in student circumstances, subject to available funds.

Applications are received and initially checked by the Finance Officer. A final review and approval is completed by the School Business Manager. Complex cases may be referred to the Associate Assistant Headteacher (Director of Sixth Form), the Headteacher, or the Trust finance team for guidance.

Students are notified of the outcome of their application via their school email address.

Conditions of Payment:

Receipt of bursary payments is conditional upon students meeting the expectations set out in the Sixth Form Learning Contract. This includes:

- Maintaining excellent attendance and punctuality
- Full participation in lessons, assemblies, enrichment activities, and examinations
- Making consistent academic progress
- Providing advance notification and appropriate evidence for absences

Students in receipt of the vulnerable (high level) bursary must remain enrolled on and engaged with a full study programme.

Students are required to sign a bursary agreement confirming their understanding of these conditions. Where conditions are not met, bursary payments may be withheld or withdrawn following review and communication with the student.

Claims and Payments:

No bursary payments are made in advance. Students must purchase items first and submit a claim for reimbursement with supporting evidence.

- Claims are initially checked by the Finance Officer.
- Final authorisation of payments is completed by the School Business Manager.

Payments are made by BACS directly into the student's bank account via the school's finance system.

Financial Controls and Monitoring:

An internal bursary payment spreadsheet is maintained to record awards, claims, and payments.

- The Finance Officer checks remaining bursary balances before processing payments.
- Controls are in place to prevent overspending or duplicate payments.

Recording and Audit Trail:

Fortis Academy maintains a clear audit trail, including:

- Applications and supporting evidence
- Approval decisions

- Claims and payment records

Eligible students receiving bursary support are recorded in the school census.

Data Protection and Storage:

All bursary documentation is stored securely in line with GDPR and The Shaw Education Trust's data protection policy.

- Physical records are kept in a locked safe
- Electronic records are stored securely with restricted access

Raising Awareness of the Bursary Fund:

Information about the 16–19 Bursary Fund is:

- Published on the school website
- Included in prospectuses and marketing materials
- Shared during open events and enrolment
- Communicated through feeder schools and local authority networks

The policy is made available sufficiently early to enable students to make informed decisions about their education.

Review of the Policy:

This policy is reviewed annually or sooner if ESFA guidance changes.

The School Business Manager monitors updates from GOV.UK and receives guidance updates from the Strategic Finance Lead at The Shaw Education Trust.

Responsibility for the Policy:

- Finance Officer: Administration, initial checks, claims processing
- School Business Manager: Approval, oversight, compliance
- Headteacher: Strategic oversight