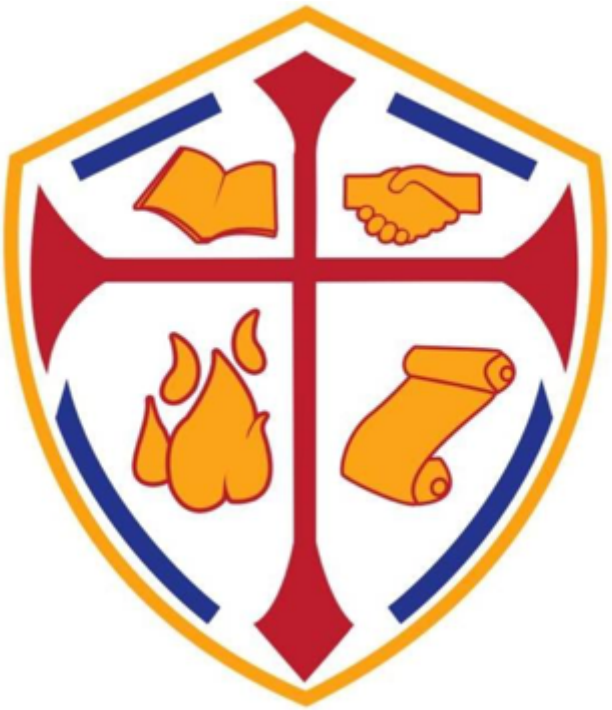
Bursary Fund 16-19 Policy

All Saints Catholic School



"We are all one in Christ, our mission and our responsibility is to recognize all individuals in our community as part of the body of Christ and to value them accordingly in our treatment of them, thriving and progressing in a spirit of togetherness"

(1 Cor. 12:29)

Approved by Chair of Governor:	**Date:**
Last reviewed on:	June 2026
Next review due by:	June 2027

Bursary Policy 26/27 DRAFT

1. Introduction & Core Principles

This policy outlines the governance, administration, and compliance protocols for the distribution of the 16-19 Bursary Fund. The primary objective of the fund is to remove specific financial barriers to educational participation, ensuring all eligible young people can access, thrive within, and complete their chosen post-16 curriculum without
economic hardship.

This document is aligned with the official guidance issued by the Education and Skills Funding Agency (ESFA) for the 2026 to 2027 academic year. We are dedicated to maintaining an absolute, audit-ready operational framework while deploying resources to promote equity, diversity, and rapid social mobility within our Sixth Form student cohort.

Critical ESFA Audit Mandate: In strict accordance with national funding rules, no student possesses an automatic entitlement to a standardised or flat-rate cash allocation. All discretionary and vulnerable awards are explicitly bound to an individualised assessment of documented financial need, the verification of exact education-related participation costs, and the strict availability of institutional allocations. Cash rewards or un-itemised block payments are entirely prohibited.

2. General Eligibility Criteria

To qualify for consideration under either the Vulnerable or Discretionary Bursary categories, an applicant must satisfy the statutory baseline requirements enforced by the ESFA:

2.1 Age Thresholds

The student must be aged 16 or over but under 19 on 31 August 2026.
Students aged 19 or over are strictly excluded from receiving funding unless they are continuing a specific study programme they commenced aged 16 to 18, or they hold a valid, active Education, Health and Care Plan (EHCP) issued by their Local Authority.

2.2 Residency Status

The student must fully satisfy the residency criteria set forth within the official ESFA funding regulations. This generally dictates that the student must hold British/Irish citizenship, possess settled/pre-settled status under the EU Settlement Scheme, or maintain an alternative form of legally recognised long-term leave to remain, while having been ordinarily resident in the United Kingdom for a minimum sequence of three consecutive years prior to the start of their educational programme.

3. Types Of Bursary & Assessment Frameworks

3.1 Category A: Bursary for Defined Vulnerable Groups

Students matching the explicit statutory definitions specified below are eligible to claim a financial allocation of **up to £1,200 per academic year** to clear necessary participation expenses.

Statutory Eligible Groups:

1. Young people currently held in the statutory care of a Local Authority (Looked After Children).
2. Care Leavers directly supported by a Local Authority leaving-care service framework.
3. Students receiving Income Support or Universal Credit (UC) in their own right because they are financially supporting themselves, or supporting themselves and a dependent child or partner living with them.
4. Disabled students who are in receipt of both Employment and Support Allowance (ESA) or Universal Credit (UC) *AND* either Disability Living Allowance (DLA) or Personal Independence Payments (PIP) in their own right.

Verification & Needs-Assessment:
Eligibility must be validated via formal, unaltered documentation. This includes recent, verified written confirmation from the placing Local Authority (e.g., social worker or leaving-care team) or an official benefit notification statement from the Department for Work and Pensions (DWP). The institution will perform a rigorous assessment of actual study expenses. If a vulnerable student's calculated requirements (e.g., travel, specialised kits) equal £800, an £800 award will be provisioned. If zero direct educational costs exist due to total coverage by external care agencies, the formal allocation will be set to £0.

3.2 Category B: Discretionary Bursary (London Regional Model)

Discretionary funds are targeted directly at students experiencing localised economic disadvantage. To account for the severe inflation, rent pressures, and heightened living costs intrinsic to the Greater London area, this institution rejects generic national income targets and implements an expanded three-tiered, progressive framework based on verified gross annualised household income.

Priority Tier	Household Income Threshold	Targeted Institutional Interventions & Allowances
Tier 1	Under £16,190 per annum (Or actively eligible for Free School Meals)	100% provisioning of core transport requirements (Oyster top-ups for tube/rail), essential textbook sets, mandatory course uniforms, required field trips, and higher education entry/progression fees.
Tier 2	£16,191 to £30,000 per annum	Percentage-based co-investment subsidies for equipment and transportation. 100% institutional coverage for university progression overheads (UCAS and mandatory entrance exams).
Tier 3	£30,001 to £35,000 per annum	Case-by-case, highly targeted "in-kind" contributions or item subsidies (capped up to 50% value) strictly restricted to high-cost coursework

		components or core learning resources.

London Regional Contextual Modifiers:

- **The Large Family Escalator:** If a household contains three or more dependent children under the age of 18 residing permanently at the primary family address, the student's application will trigger an expedited individual review.
- **Evidence Requirement for the Large Family Escalator:** To validate eligibility for this review, families must submit official documentation confirming the residency of three or more dependent children. Acceptable evidence is strictly limited to:
    1. A current HMRC Child Benefit or Tax Credits award letter itemizing the dependents.
    2. A recent, full Universal Credit monthly summary showing the explicit child element allocation for each dependent.
    3. Official enrollment or status letters from the respective schools/nurseries of the younger siblings, clearly showing a matching residential address.

- **The Upper Discretionary Cap Adjustment:** Applications originating from households with gross annualised earnings between £35,001 and £40,000 are formally locked from standard automated processing. They will only be evaluated by the Senior Leadership Team under the **Exceptional Hardship Clause (Section 8)** where localised structural deprivation can be proved (e.g, non-subsidised rent or mortgage costs consuming greater than 50% of the household's net take-home pay).

3.3 Differentiated Operational Procurement Paths

To eliminate compliance vulnerabilities associated with cash disbursements, the institution differentiates the operational methodology of resource delivery according to a student's priority tier status:

Tier 1	Direct Provision	The school acts as the sole purchasing agent. Resources are purchased via institutional trade accounts and issued directly to the pupil. Zero cash transactions are authorised.
Tier 2	Co-investment Provision	A 75/25 split. Parent/carer clear a 25% share of the item's cost via the school's online payment portal. Upon clearance, the bursary clears the 75% balance and fulfills the order
Tier 3	Evidence & Reimburse	Retrospective reimbursement. The student self-funds the item and uploads an itemised receipt alongside a signed confirmation from their subject teacher verifying that the item is a required learning

		resource for the syllabus. Approved educational items receive a 50% bank refund.

4. Allowable And Excluded Expenditures

Bursary funds must be strictly restricted to items directly compounding a student's capability to participate in their core academic study programme. The following parameters dictate acceptable and non-acceptable itemisations:

Approved Allowable Educational Expenses	Strictly Excluded Prohibited Expenditures
• Public transport costs to/from school via necessary TfL Tube, Rail, or Overground corridors. • Prescribed syllabus textbooks, core revision guides, and official study software licenses. • Course-specific specialist equipment (e.g., lab coats, art design materials, advanced calculators). • Essential clothing costs that strictly meet the minimum requirements of the mandatory Sixth Form Uniform code. • Higher education progression charges (UCAS fees, UCAT/ LNAT test admissions). • Travel expenses to a maximum of 2x Higher Education Open Days or formal university interviews (standard-class rail or coach travel only)	• •General day-to-day living, lifestyle, or entertainment costs. • Non-compulsory or voluntary extra-curricular recreational trips and social events. • Tech devices purchased for personal use outside of curriculum parameters. • Personal mobile phone contracts or residential broadband utility bills. • General learning support adjustments that fall under the institution's primary statutory obligations. • Private academic tutoring, out-of-school coaching, or independent counselling services.

5. Direct Procurement & "In-Kind" Provisions

In accordance with ESFA guidance recommending that institutions provide support through "in-kind" mechanisms rather than direct cash payments, the sixth form enforces direct corporate purchasing by default. This standardises resource quality, maximises institutional purchasing power, and prevents the diversion of public funding away from the student's direct educational needs.

- **The Academic Technology Loan Scheme:** Rather than granting cash subsidies for laptops, the sixth form utilises a central inventory pool of high-specification devices. Eligible students are allocated an institutional laptop for their two-year study cycle. These laptops remain the legal property of the school, are maintained by the network team with

appropriate filtering and monitoring, and must be returned in good condition upon the student's graduation.

6. Attendance And Performance Conditions

Receipt of bursary funding is strictly conditional upon the student maintaining exemplary compliance with the standards established in the signed Sixth Form Learning Agreement.

6.1 The 95% Attendance Mandate

Students must preserve a minimum cumulative attendance threshold of 95% across all timetabled lessons, mandatory assemblies, enrichment blocks, and registration periods. Attendance tracking is evaluated weekly by the Sixth Form Team.

6.2 Compassionate and Documented Adjustments

The institution will actively adjust compliance parameters to ensure students are not unfairly penalised for absences directly arising from documented medical issues, hospital appointments, emergency dental surgery, official bereavement, or pre-arranged young carer obligations. Self-certified or unapproved absences will not be exempted.

6.3 Suspension of Funding

If a student's unauthorised absence causes their weekly tracking to fall below 95%, or if they fail to meet standard behavioral and academic progression marks, regular in-kind provisions will be paused. Funding will remain locked until a standard compliance is re-established to the satisfaction of the Head of Sixth Form.

The 95% threshold is a guideline for intervention; individual cases will be reviewed by the Head of Sixth Form before funding is formally suspended.

7. Application Windows & Contingency Reserves

The bursary cycle is split into structured processing windows to maximise fiscal safety and protect capital reserves across the full academic year:

- **The Primary Application Window:** Opens formally on 1 September 2026 and closes strictly on 16 October 2026. This timeframe handles the vast majority of student assessments and allows the Finance team to map out approximately 80% of the total annual discretionary allocation.
- **The 20% Emergency Contingency Pot:** The institution structurally isolates and ring-fences 20% of its overall discretionary funding pool. This reserve is explicitly preserved to process mid-year applications resulting from unpredicted household income shocks, including sudden parental redundancy, domestic disruptions, or unexpected changes in dependent status.

8. Exceptional Hardship & Appeals Clause

The institution recognises that families may experience sudden financial crises that standard income bands fail to reflect. This section guarantees a robust mechanism for individualised crisis management and procedural transparency.

8.1 Exceptional Hardship Applications
Students whose household incomes reside above the standard £35,000 threshold may file a supplementary Exceptional Hardship Request. This application must contain comprehensive evidence of an immediate structural deficit, such as proof of sudden family separation, unexpected eviction/homelessness or severe illness impacting a primary breadwinner.These applications are subjected to a review by the Senior Leadership Committee.

8.2 Structured Appeals Process
If an application is formally rejected, or an applicant disputes the specific percentage contribution determined by the needs-assessment, the family possesses a right to escalate the decision through the following mandatory sequence:

1 Submit Written Appeal (Within 14 Days):
The applicant must submit a formal letter of appeal addressed to the Head of Sixth Form. The letter must explicitly outline the procedural or financial grounds for the dispute and must include newly verified supporting evidence of household hardship or specific educational expenses.

2 Panel Review Convocation (Within 10 Working Days):
An internal Review Panel will systematically re-evaluate the application, the needs-assessment log, and the matching budget availability.

3 Final Determination Issued (Within 5 Working Days):
A formal written outcome report will be sent directly to the family. This decision stands as the institution's final position. If the applicant continues to allege a material breach of compliance, they may escalate their complaint externally to the ESFA.

9. Data Security & Audit Compliance

To ensure a flawless audit trail that fully withstands official ESFA investigation or independent financial review, the school adheres to rigorous data retention protocols:

- **Evidence Collection Rules:** The school will only accept official, untampered source documents. For Universal Credit verification, the family must provide the three most recent monthly award statements to ensure accurate calculation of fluctuating income baselines. P60s, formal benefit letters, tenancy agreements, and physical or digital purchasing receipts are required.

- **Secure Retention Period:** All documentation, application filings, internal calculation logs, and receipt records will be securely digitised and preserved within an encrypted, restricted-access compliance directory for a minimum of 6 years. This aligns with UK government requirements for tracking public funds. All physical documents will be destroyed via secure shredding protocols to maintain strict confidentiality and GDPR compliance.

Notes 26/27: *Our tiers directly reflect our local demographics in Barking and Dagenham, which has the lowest median household income in London (£29,420) and a 42% child poverty rate after housing costs. Tier 1 covers our highest-density benefit-dependent cohort; Tier 2 directly targets our local borough income average; and Tier 3 cushions working families who face severe local rent-to-income stress, fully aligning our funding with actual regional barriers to education.*