Cabot Learning Federation

Bursary Policy

Date of Approval:
Approved by:
Review Frequency: Annual
Next Review: July 2027

History of most recent Policy changes

Date	Page	Change	Origin of Change e.g. TU request, Change in legislation
Date	E.g. Whole Document	Detail of change	Reason for change
June 2023	Whole Document	Formal writing of CLF Post-16 Bursary Policy	Bursary policies and processes previously collated locally. The CLF Bursary Policy brings together those policies and processes to replace them with a single Trust-wide document.
July 2024	Whole Document		Review to include updates in the ESFA 16 to 19 guidance 2024-25
April 2025	Whole Document		Review to include updates in the ESFA 16 to 19 guidance 2025-26
June 2026	Whole Document	Updates in line with DFE policy, and amend ESFA to DfE	Review to include updates in the DFE 16 to 19 guidance 2026-27

Contents

History of most recent Policy changes....2
Contents....3
1 Policy Objective....4
2 Bursary Criteria....4
3 Types of Bursary....6
4 Evidence requirements....8
5 Bursary Applications....9
6 Complaints....10
7 Payment of bursary to Students....10
8 CLF Bursary Funding....13
9 Use of Bursary....14
10 Unspent Bursary....14
11 Audit & Assurance....14
12 Equality and Diversity....14
13 Policy Monitoring....15
14 Matters beyond policy scope....15

1 Policy Statement

1.1 This policy is intended to:

- support CLF Post-16 students in overcoming the specific financial barriers to participation they face to allow them to remain in education.
- provide fair and equitable access to the bursary fund across its Post-16 provisions, within the framework set out by DfE bursary fund guidance and in compliance with CLF Financial Regulations.

2 Bursary Criteria

2.1 Bursary entitlement is assessed against two main criteria: Student Eligibility and Student Financial Need.

2.2 Student Eligibility is defined as:

- A student must be aged 16 or over but under 19 on 31 August 2026 to be eligible for help from the bursary fund in the 2026 to 2027 academic year.
- Students aged 19 or over are only eligible to receive a discretionary bursary if
    - they are continuing on a study programme they began aged 16 to 18 (19+ continuers)
    - or have an Education, Health and Care (ECH) Plan.
- These two groups of aged 19+ students can receive a discretionary bursary while they continue to attend education (in the case of a 19+ continuer, this must be the same programme they started before they turned 19), as long as their eligibility continues and their institution considers they need the support to continue their participation.
- Students aged 19 or over are not eligible for bursaries for vulnerable groups.
- Students must meet the residency criteria in DfE funding regulations for Post-16 provision in the 2026/2026 academic year. Please see Appendix 1 for DfE residency criteria.
- **Students under 16**. Students are only eligible for bursary funding if they are aged 16 or over. In exceptional circumstances students under 16 on funded 16 to 19 programmes may be eligible i.e where the student is on an accelerated study programme.
- **Asylum-seeking children**. Accompanied asylum seeking children and those under 18 with an adult relative or partner and those aged 18 and above are entitled to education, but not to public funds. If they are destitute, they can apply to the Home Office (HO) for suitable housing and cash for essentials. As long as an asylum seeker has not had their application for asylum refused, the bursary fund can be used to provide in-kind student support such as books, equipment, or a travel pass. Under no circumstances should cash be given to an accompanied asylum seeker.
- Unaccompanied asylum-seeking children are treated as looked after children and are eligible for a bursary for vulnerable groups ('in care' group), where they have a financial need. When they reach 18 their immigration status must be considered. If the asylum claim is decided in their favour, they continue to be eligible for a bursary as a student from a vulnerable group. Where the claim is not decided in their favour, the individual may not be able to legally stay in the UK. In this instance, once the asylum claim has

been fully heard/ appeals process exhausted, the individual has no claim to public funds, but will continue to do so until this point is reached.

- Distance Learning - Students accessing CLF Post-16 courses attend site. Where distance-learning arrangements are in place, students are not expected to require help from the bursary fund because they are not subject to the types of costs the bursary is intended to cover (travel, equipment, and uniform for example). Where these students require financial help, support should be provided in-kind i.e. a temporary travel pass for the student to attend exams.
- Distance Learning - in extenuating circumstances, distance learning arrangements may be in place i.e. remote lessons due to staff absence, emergency school closures etc. Where this is the case, costs incurred to enable course participation may be covered i.e. meals for pupils in receipt of FSM.

2.3 Student Financial Need is defined as:

- Students individual financial need must be assessed when awarding bursary funding. Blanket and flat / fixed rate payments without an assessment of actual financial need is prohibited across all priority groups.
- Provisions may decide that although a young person may be eligible for a bursary, 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 and a students' application can be refused on this basis.
- Financial need is determined based on students' actual **course-related costs** to enable participation, including:
    - meals on the day of study for students eligible for FSM
    - books, equipment
    - Coursework materials
    - Off-site curriculum visits and fieldwork
    - uniform/specialist clothing related to the course
    - transport to education provision
    - transport to industry placements
    - University interviews/open days or job interviews
    - Exam resits
- It should be noted that for items of equipment including books and laptops, students must return them once they have completed their study programme so they can be used again by another student where appropriate. If keeping equipment on site is the best way of ensuring this happens, provisions have the right to set this as a condition.
- Bursaries cannot be used for the following:
    - Learning support costs i.e. counselling, mentoring, additional tutoring, servicing of laptops/tablets
    - Support for extra-curricular activities where not essential to the student's study programme
    - General household income support (rent, bills, wi-fi etc.)
    - to incentivise/ reward attendance
    - to encourage students to choose CLF over non-CLF Post-16 provisions

- Support the costs of foreign/overseas field trips where the content can be found within England at a much cheaper cost and/or to support the costs of field trips that are not an essential part of the students study programme
- Block subsidy of the canteen
- Block provision of equipment, material or books

3 Types of Bursary

3.1 There are three types of bursary available:

- Vulnerable Groups Bursary (Priority Group 1)
- Discretionary Bursary (Priority Groups 2 – 4)
- Emergency Meal Support (ad-hoc and by exception; see Section 3.3)

3.2 Vulnerable Groups Bursary

Priority	Criteria	Potential Award
1	Students must meet one of the following criteria to qualify for the Vulnerable Groups Bursary: **<u>In care/ Care leavers:</u>** • **In care** – a young person aged 16 and 17 looked after by a local authority on a voluntary basis. • **Care leavers**: - A young person aged 16 and 17 who was previously looked after for a period of 13 weeks consecutively (or periods amounting to 13 weeks), which began after the age of 14 and ended after the age of 16: or, - A young person aged 18 or above who was looked after prior to becoming 18 for a period of 13 weeks consecutively (or periods of 13 weeks), which began after the age of 14 and ended after the age of 16.	Up to 100% of course-related costs per section 2.2. Up to £1,200 per year. *Students should only receive the amount they actually need to participate. Automatic awards of £1,200 must not be made.* *If a student's financial need exceeds £1,200, any amount over this must be paid from the discretionary bursary allocation and subject to the same eligibility/ assessment criteria.*
1	**<u>Recipients of Universal Credit</u>** • In receipt of 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. **<u>Recipients of Income Support</u>** • In receipt of Income Support (IS) 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. **<u>Recipients of Disability Living Allowance or Personal Independent Payments</u>**	Up to 100% of course-related costs per section 2.2. Up to £1,200 per year.

	• 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	

3.3 Discretionary Bursary

Priority	Criteria	Potential Award
2	Students who are unable to access other forms of student support funding and either Parent/Carer is in receipt of: • Universal Credit • Support under Part VI of the Immigration and Asylum Act 1999. • The Guarantee element of State Pension Credit. Students who are unable to access any other form of student support funding and parental income, including child tax credit and working tax credit is **below £29,869**	Up to 100% of course-related costs per section 2.2
3	Students who are unable to access any other form of student support funding and parental income, including child tax credit and working tax credit is **between £29,869 to £39,829**	Up to 75% course-related costs per section 2.2
4	Students who are unable to access other forms of Student support funding and: • Parental income including child tax credit and working tax credit is **between £39,829 and £49,782** • whose circumstances are causing them to suffer hardship and they require financial assistance, during their period of study	Up to 50% course-related costs per section 2.2
5	Students who do not fall into any of the above categories but whose circumstances are causing them to suffer hardship or who are at risk of being unable to continue their studies because of hardship.	At the discretion of the Post-16 provision

Please see *Appendix 2* for the calculations used to determine the Priority Group income bandings.

3.31 Discretionary bursary funding is limited, as such it should be noted that students who are eligible for support are not automatically entitled to bursaries. The level of support offered may differto the above based on overall cohort need relative to available funding. Where available funding is insufficient to meet the awards for students in Priority Groups 2-4 outlined above, a percentage reduction should be applied across all discretionary groups so that bursary awards match available funding

3.4 Emergency Meal support

Where the academy identifies a student that is in real need emergency meal support can be provided on the days a student is in school and can be offered without completing the usual

household income evidence checks. This is a temporary arrangement with a full discretionary assessment need. The following applies:

- A small provision from the academy's discretionary bursary funding should be retained for emergency meal support for students not in receipt of bursary funding.
- This is ad-hoc support to be provided to students in financial hardship, without checks required to determine student eligibility or student financial need.
- Academy staff should provide a lunch pass to pupils to allow them to claim a free lunch from the academy's catering facility. This should show the pupil's name and the date for the pass.
- Academy staff must retain a record of;
    - number of students provided emergency meal or travel support
    - number of days emergency meals or travel support is given
    - the value to each student
    - the reason for the support
    - signed confirmation from the student that they received the funding to be spent of food or travel.
- It is expected that this should only apply to a small number of students and is not intended to be a long-term solution. Where a student's situation of financial hardship is expected to continue, the academy should direct them to the bursary policy and support them in completing an application to access bursary funds.

4 Evidence requirements

4.1 Vulnerable Groups Bursary (Priority Group 1) Evidence

Evidence of students' eligibility for Vulnerable Groups bursary funding must be submitted each year, even if this means re-submitting the same evidence as the previous year (i.e. to evidence looked-after status). This is in line with requirements for Vulnerable Group funding claims submitted to the Student Bursary Support Service.

In care/ Care leavers	Written confirmation of the student's current or previous looked-after status from the Student's Local Authority that looks after them or provides their leaving care services. This evidence can be a letter or an email, but must be clearly from the Local Authority
Recipients of UC or IS	A copy of the student's UC / IS current award notice. The student must be entitled to the benefit in their own right. UC claimants can print off details of their award from their online account or provide a screenshot. Students can also contact their UC work coach and ask for support to provide evidence. .
Recipients of DLA or PIP	A copy of the current Student's Employment Support Allowance (ESA), Universal Credit Statement and Disability Living Allowance (DLA) or Personal Independence Payment (PIP) Award letter from the DWP,

4.2 Discretionary Bursary (Priority Groups 2 – 4) Evidence

The criteria for Priority Groups 2 – 4 require checks on Parent(s) / Carer(s) (P/C) household income that must be submitted at the beginning of the students' studies. In subsequent years students must provide conformation on the Applicaa portal that their circumstances have not

changed to the extent that their level of bursary entitlement would be affected per the conditions of their Priority Group.

P/C receiving of Tax Credits'	A copy of **ALL PAGES** of P/C most recent Tax Credits Award. This must clearly show the total 'Income for the year 06 April 2025 to 5 April 2026 and 'Amounts to be paid for Working and Child Tax Credit' for the period. Accepted versions will have one of the following Award letter titles: Tax Credits Award for 06/04/2025 to 05/04/2026 Amended Tax Credit Award for 06/04/2025 to 05/04/2026 Final Tax Credits Decision for 2025/2026 **OR** Tax Credits – Annual Review for Year Ended 05/04/26
P/C receiving Universal Credit	Copies of of P/C latest award statement. Note: • Take home pay figure in addition to the UC, after deductions, provides a total monthly income • A mobile view or printout can be used • It is recommended that 3 most recent monthly awards are used as a guide for the estimated annual income
P/C receiving Benefits	A copy of P/C Benefit Award letter from the DWP, **dated within the last 3 months.**
P/C not receiving Tax Credits, Universal Credit or Income related Benefits'	Employed P/C: A copy of your P60 for the 2025/2026 Tax Year **OR** Copies of **three** of P/C most recent payslips Self-employed P/C A copy of P/C SA302 for the 2025/2026 Tax Year

5 Bursary Applications

5.1 Student applications should be submitted and administered via the Applicaa online portal and must be supported with accompanying evidence uploaded to the portal.

5.2 Evidence must be reviewed against students' applications by the academy to ensure that the evidence submitted meets policy requirements and is in alignment with the student's application.

5.3 Paper application forms are available to students to ensure that all students are able to access the bursary application process. A copy of the paper application form can be found in *Appendix 3.* All applications received on paper application forms are to be reviewed and uploaded by Academy staff to administer the students' bursary on the online portal with the original paperwork and supporting documents returned to the student.

5.4 It is imperative that students are able to access support in applying for and subsequently administering their bursaries. Provisions must therefore clearly publish up-to-date

information for a contact within the academy that they are able to liaise with in the event of queries.

6 Complaints

6.1 Where a student has any concerns or queries regarding their bursary application, in the first instance they should e-mail the bursary inbox for the relevant academy. The complaint will then be reviewed by the CLF bursary panel.

6.2 The panel will comprise three members of CLF staff, with one finance representative and two Post-16 representatives. The academy receiving the complaint will reach out to colleagues to create the panel reviewing complaints as they are received.

6.3 Should a student feel that their concerns remain outstanding, they can then request that the complaint is escalated through the academy formal complaints process

7 Payment of bursary to Students

7.1 Bursary payments will be made to students as 10 monthly payments per the below schedule. The payment timetable is structured to ensure that students are not out of pocket and access to their course is not limited by a shortfall in bursary support;

Application Deadline (Sept)	Second Friday of Term 1
September payment	Second Friday of October
November – July payment	Second Friday of the month
Application Deadline (Sept onwards)	Last Friday of the month

7.2 All students are encouraged to submit their applications by the September deadline. Late applications will be accepted per the deadlines outlined above and will follow the same payment arrangements as other bursary payments

7.3 Where possible, support should be provided in-kind rather than as a monetary payment. The below table notes the preferred route through which course-related costs should be met. It is understood that this may sometimes not be practical and so it is expected that provisions exercise reasonable discretion in deviating from these guidelines, ensuring that evidence requirements are met and records are maintained at student level in the Applicaa system in doing so

7.4 Payments will be backdated by a maximum of 3 months in line with CLF finance policy, particularly as it is recognised that students can face challenges in securing the evidence required to process their bursary applications

7.5 Whilst late applications are accepted, applications will close once the bursary budget has been fully utilised

7.6 Payment of bursary will be linked to attendance where possible, to ensure that bursary payments match actual financial need.

Course-related cost	Purchasing Guidelines	Evidence required
Meals on day of study	• Meal to be provided from on-site canteen where students are eligible for FSM • Where off-site for course-related reasons, FSM students can source meals from elsewhere	• Catering provider to provide details of FSM P16 students accessing on-site meals. The respective costs can then be reimbursed from the bursary pot to the academy budget. The students record must also be periodically updated on Applica to ensure that student-level bursary balances are correct. • Where meals are sourced off-site, the student must provide a copy of meal receipts for each meal. • Maximum spend £6.00
Laptops	• Where specialist hardware is required for a course, it should firstly be considered whether the institution should be providing equipment from the academy budget for general on-site use. • Where this isn't possible and it is deemed that the student requires their own laptop from the bursary fund, the provision will procure the item on the students behalf once any contribution from the student/ their carer has been received. • Laptops must be returned to the academy once study is complete • Where the academy wishes to purchase laptops in anticipation of assigning to a student in receipt of bursary funding, the laptop will be purchased from the academy budget and charged to the bursary once the laptop has been assigned. This is only possible where the laptop is purchased and assigned to a student in the same academic year.	• Receipt/ invoice for the purchase of the laptop actioned by the academy • Where the student / their carer purchases the laptop themselves, the purchase must be approved in advance by the Principal and where appropriate CLF IT team to advise on value for money. The student/ carer should provide the academy with a copy of all supporting documents relating to the purchase (i.e. receipt/ confirmation of order/ delivery address) to demonstrate that the laptop has been purchased for and resides with the student, at which point the academy will reimburse the agreed cost from the student's bursary fund.
Public transport	• Where possible, tickets for public transport services should be purchased directly by the academy in advance as a monthly or weekly pass, depending on how term-dates fall in the relevant month. • Where it isn't practical to purchase tickets on the students' behalf, money can be paid directly to the student via the bursary fund. • Where travel passes are purchased on a contract basis by the academy, the purchase will be made by the academy budget and then charged to the bursary pot once travel passes are assigned to individual pupils. • Where transport costs are not covered by the local authority	• Where pupils purchase their own travel passes, picture evidence must be uploaded to Applicaa. In line with DfE guidelines, it is not necessary for students to provide copies of all travel passes. CLF Post-16 students must provide a copy of their travel pass at the start of each term, after which bursary payments will be actioned by linking this cost to attendance. • Where travel passes are purchased on a students behalf, either as an individual purchase or as part of a contract, the students record must be updated on Applicaa to maintain an

		overview of their bursary spend/ balance.
Course-related Cost	**Purchasing Guidelines**	**Evidence Required**
Private transport	• Fuel costs will be subsidised where it isn't practical or feasible for the student to travel via public transport. It is expected that such cases are rare and so will be assessed and agreed on a case-by-case basis between the Academy and the student. • Taxis may also be offered to pupils in exceptional circumstances (i.e. safeguarding concerns) • Where public transport costs are not covered by the local authority	• Mileage claim to be submitted via online portal. The rate payable will depend on the vehicle used by the student – see *Appendix 4* for applicable mileage rates. • Written statement from Student to confirm reason for using private transport. • Copy of taxi receipt where applicable.
Other (books, uniforms, specialist clothing)	• Where possible these should be purchased directly by the academy. • Where a student is contributing towards the cost of materials, the academy will procure the item on the student's behalf once the contribution from the student/ their carer has been received. • Where the academy wishes to purchase books in anticipation of assigning to a student in receipt of bursary funding, the books will be purchased from the academy budget and charged to the bursary once the books have been assigned to an individual student. This is only possible where the books are purchased and assigned to a student in the same academic year. • Where a student needs items of clothing/footwear to be able to access education, this is possible as an exceptional circumstance where the academy has agreed on the need and impact on accessing education provision	• Receipt/ invoice for the purchase of materials actioned by the Academy • If for any reason the student / their carer purchases materials instead of the academy, they should provide the academy with a copy of the receipt. All claims will require approval ensuring that the amount claimed is in line with the price that could be achieved through the academy making the purchase. Any overspend approval is at the discretion of the Principal.
University interviews/open days/ job interviews/ off-site fieldwork/industry placement	• Where possible, tickets for public transport services should be purchased directly by the academy for the cheapest method of public transport that would enable the student to attend the full event. • Where it isn't practical for the academy to purchase tickets on a students behalf, money can be paid directly to them to the value of the cheapest method of public transport that would enable the student to attend the full event. • A student is entitled to support for meal costs where they are eligible for FSM. This should be to the value of a standard lunchtime meal deal as evidenced by their receipt.	• A copy of public transport receipt relating to the interview/ open day. • A copy of the receipt for meal costs. • A copy of documentation to demonstrate attendance (i.e. confirmation e-mail/ letter for an interview/ a screenshot to show university open day date) • Any other purchases further to the above must be evidenced by receipts. • Maximum spend £6.00

	• Any costs further to the above must be assessed and agreed on a case-by-case basis between the academy and the student.	
Exam Resits	• Exam resits must be paid for by the student, which will then be reimbursed from the bursary fund once the student has sat the exam.	• Update of student record on Applica to assign resit costs to students' bursary fund.

8 CLF Bursary Funding

8.1 Funding for Vulnerable Groups (Priority 1): Draw-down

8.11 Funding claims for vulnerable groups will be centrally manged and claimed.

8.12 Funding should be drawn down from the Student Bursary Support Service (SBSS) on an ad-hoc basis throughout the year, as soon as is practicable once new Students have been identified and verified**.**

8.12 Funding can be drawn down by completing and submitting a bursary for vulnerable groups funding claim via the SBSS online portal at the following points in the year :

Purpose	Dates	Payment
Window 1	8 Sept 2026 – 12 Nov 2026	Feb 2027
Window 2	5 Jan 2027 – 11 Feb 2027	Apr 2027
Window 3	18 May 2027 – 1 Jul 2027	Sep 2027

8.13 Only the amount of funding needed should be drawn down based on the student's financial need – the full £1,200 should not be drawn down if not required.

8.15 The SBSS portal doesn't function as a filing system, and so a copy of funding claims submitted must be retained, along with records of funding paid to them through the claims process.

8.16 Where unused bursaries for vulnerable groups accrue (i.e. where there is a difference between predicted and actual financial need, a student leaves etc), this funding should be recycled to offset funding claims for other eligible students until 30 April. Where there remains unused funding after this, P16 provisions can add this to their discretionary bursary allocation from 1 May.

8.17 Where incorrect submissions have been made, the respective funding should be recycled on subsequent Vulnerable Group funding claims. If there are no others students eligible for vulnerable group funding however, this allocation cannot be added to the

discretionary bursary (as it has been claimed in error), and the central team must contact SBSS to return the funds

8.2 Funding for Priority Groups 2 -4: Discretionary Bursary Allocation

8.21 The DfE makes a lump-sum discretionary bursary allocation for provisions to distribute to individual Students based on 2 elements; 1) financial disadvantage; 2) student costs to support travel and industry placements. Please see Appendix 5 for more information on the calculation.

8.22 Where a Post-16 provision operates through subcontracts or from more than one location across England, the allocation is made to the lead institution. The lead institution is responsible for ensuring the bursary fund is administered appropriately at each site, and that students are able to access support.

8.23 Allocations are paid by the DfE to the Academy in 2 payments : 2/3 in September and 1/3 in April

9 Use of Bursary

9.1 Up to 5% of the bursary allocation may be used for administrative costs relating to the 16 to 19 Bursary Fund per the DfE guidance.

9.2 The Trust will use the allocation to fund the costs of the online bursary management software and to support central staffing costs incurred in administering the bursary process.

9.3 Any remaining allocation can be applied for by academies to support costs directly relating to the administration of bursaries. Requests should be submitted to the Deputy Finance Director.

10 Unspent Bursary

10.1 Unspent bursary funds may be carried over to the bursary fund for the next academic year. The funds are ringfenced for this purpose and cannot support the academy budget.

10.2 Provisions must be able to confirm the amount of unspent funds carried forward from the previous year, and they must ensure that they fully use unspent funds before using the new academic year allocation.

10.3 Unspent funds of more than a year must be returned and reported by 31 March.

10.4 The central CLF Treasury Team will maintain a reconciliation of the bursary by Academy to track bursary spend and balances.

11 Audit & Assurance

11.1 Bursary awards are made based on hardship. This must be substantiated by evidence at the point of application, which will be securely retained for 6 years per DfE guidance.

11.2 16 to 19 Bursary Funds are subject to audit and all bursary applications and supporting information are must be maintained at student level.

11.3 The CLF operates a bursary application and administration process through an online bursary management platform that supports and satisfies audit requirements. Academy staff retain a role in ensuring and demonstrating that the guidelines per this policy document are observed.

12 Equality and Diversity

12.1 The implementation of this policy and its processes will not discriminate against students on the basis of any protected characteristics as set out in equalities legislation

13 Policy Monitoring

13.1 This policy will be reviewed annually in line with the annual DfE 16 to 19 Bursary Fund guidance

13.2 This review will be completed each year to support the new round of applications for the subsequent academic year.

14 Maters beyond policy scope

14.1 Any circumstances or situations not covered by this policy must be resolved with reference to the DfE 16 to 19 Bursary Fund Guide for the 2026-27 Academic Year, with central finance guidance and approval sought as appropriate.

Appendix 1: DfE Funding guidance for young people 2025 to 2026 - Residency Eligibility

European Union (EU) and European Economic Area (EEA) students

30: The UK left the EU on 31 January 2020 and free movement between the UK and the EU has ended. The UK's points based immigration system applies and treats EU (other than Irish citizens) and non-EU citizens equally. Students who are citizens of EU (or EEA) countries (other than Irish citizens) who enter the UK after 31 December 2020 are not automatically eligible for funding and must be able to demonstrate that they are legally resident in the UK to be funded.

31: Students who are citizens of EU (or EEA) countries or children of Turkish workers who are living in the UK and have started their programme on or before 31 December 2020 must be treated equally to UK residents. Once enrolled they will be eligible for funding for the full duration of their study programme or T Level. All Irish citizens continue to be automatically eligible for funding under immigration concessions agreed with the Irish government before the UK was a member of the EU. Those who have already obtained the Home Office pre-settled and settled status will be eligible under paragraph 39 while those still completing this process should be assessed under paragraph 40.

Residency eligibility

32: The following paragraphs set out the DfE funding eligibility criteria for study programmes or T Levels. Students only need to be eligible under any one point or sub-paragraph of the individual points or sub-paragraphs in paragraphs 38 to 41. All students eligible to start their study programme are eligible for the full duration of their study programme or T Level. Paragraphs 67 to 73 explain the main exceptions covering ineligible students for funding purposes.

33: For funding purposes, institutions must establish a student's eligibility at the start of their programme. Institutions must only contact DfE regarding circumstances affecting groups of students. For individual student cases, the institution must make the funding decision itself. These decisions must align with the spirit of this guidance and be recorded as audit evidence within the enrolment process.

34: To be eligible for funding the student must have the legal right to be resident in the UK at the start of their study programme. A person subject to a Home Office deportation order will ordinarily be ineligible for funding until their situation has been resolved to the satisfaction of the Home Office. Students whose immigration permission to enter the UK is as a 'Visitor' (also commonly known as a 'Tourist') are also ineligible for 16 to 19 funding.

35: In determining student eligibility, institutions must also satisfy themselves that there is a reasonable likelihood that the student will be able to complete their study programme or T Level before seeking funding for the student. This should include the practicality of providing a place for a student who may be unable to complete their programme if they are likely to leave the country permanently during their study programme or T Level. When a student applies for a study programme or T Level where their current legal permission to remain in the UK expires 6 months or more after they start, then institutions may allow them to enrol: DfE considers it sufficient for institutions to rely on confirmation from the student (and/or family) that they intend to apply for the necessary extension to their permission to remain for the duration of their study programme or T Level. For the purposes of this paragraph, institutions must assume that all EEA students resident in the UK on or before 31 December 2020 have the legal right to remain in the UK for the duration of their study programme or T Level. Once a student is enrolled, the institution is expected to take all reasonable steps to ensure that the student can complete their programme.

36: Students who are attending a programme of more than one term's duration and are eligible for funding at the start of their programme, will usually be eligible for 16 to 19 funding for the whole duration of their study programme or T Level as well as subsequent funded study programmes or T Levels studied immediately after their initial funded programme, provided the student remains under the age of 19 on 31 August of the academic year they begin the new programme. This includes students studying consecutive study programmes with no break in studies other than normal holiday periods. Similarly, students who are not eligible for funding at the start of their study programme or T Level are very unlikely to become eligible for funding during the period of their study programme.

Definition of ordinarily resident

37: For funding purposes, DfE regards as ordinarily resident in a given country any person who habitually, normally and lawfully resides from choice and for a settled purpose in that country. Temporary absences from the relevant country should be ignored. Someone who has not been ordinarily resident because they or the person's parent or spouse or civil partner was working temporarily abroad will be treated as if they have been ordinarily resident in the relevant country.

Students eligible for funding

38: The following persons will be eligible for funding (these groups correspond to some of the groups in Schedule 1 to the Education (Fees and Awards) (England) Regulations 2007 (as amended):

a) a person on the 'relevant date'[footnote 1] who is 'settled' in the UK, and who has been ordinarily resident in the UK and Islands (that is including the Channel Islands and the Isle of Man) for the 3 years preceding the 'relevant date'. 'Settled' means having either indefinite leave to enter (ILE) or indefinite leave to remain, being an Irish citizen or having the right of abode in the UK. Students who are eligible for funding include:

i: British citizens who hold a United Kingdom of Great Britain and Northern Ireland passport

ii: Irish citizens

iii: EU citizens or family members of EEA and Swiss workers (resident in the UK before 1 January 2021) with settled status

iv: Students who are children of Turkish workers where the Turkish worker has been lawfully employed and resident in the UK before 1 January 2021

v: British Dependent Territory Citizens (now known as British Overseas Territory Citizens)

vi: those whose passports have been endorsed to show they have right of abode in the UK

vii: those who have a certificate of naturalisation or registration as a British Citizen

viii: those with Hong Kong British National (Overseas) (BN(O)) visa who have been given Home Office permission to reside in the UK

39: In addition to the groups outlined above, DfE will also consider the following groups of students (including those who may not have lived in the UK for the last 3 years) to be eligible for funding:

a) people with (or their spouses, civil partners and children with) refugee status (RS), humanitarian protection (HP), discretionary leave (DL), exceptional leave to enter (ELE) or exceptional leave to remain (ELR)

b) people with recently settled status (this means those having been granted ILE or indefinite leave to remain, right of abode or British citizenship within the 3 years immediately preceding the start of the course)

c) people granted pre-settled status following our exit from EU

40: In addition to the groups above, DfE will also consider the following groups of students (including those who may not have lived in the UK for the last 3 years), aged up to and including the age of 18, as eligible for funding as follows:

a) those who are accompanying or joining parents or spouses or civil partners[footnote 2] who have the right of abode or leave to enter or remain in the UK (or accompanying or joining relevant family members, usually parents, who are UK or Irish citizens), or those who are children of diplomats

b) those who are dependants of teachers coming to the UK on a teacher exchange scheme

c) those who are residing legally in the UK (including those entering the UK in the last 3 years who are or were not accompanied by their parents) who are British (or Irish) citizens or those whose passports have been endorsed (or as part of move to digital immigration systems, either a biometric residency permit, or an equivalent digital status and/or an endorsement letter) to either show they have the right of abode in this country or to show that they have no restrictions on working in the UK

d) those who are dependants of adults residing legally in the UK who have been given immigration rights as workers to reside in the UK

e) those who are dependants of foreign students where the accompanying parent or legal guardian has a student visa (the accompanying parent or legal guardian is excluded from our funding as set out in paragraph 71)

f) asylum seekers

g) those having been granted leave under section 67 of the Immigration Act 2016 (the 'Dubs' amendment)

h) those having been granted Calais leave to remain

i) those who are (including unaccompanied asylum seekers) placed in the care of social services or those receiving section 4 support

41: In addition to considering students in the categories listed in the 3 paragraphs above, the funding body will consider other exceptional circumstances. When an institution believes that a student should be considered for DfE funding under exceptional circumstances, it must contact DfE for guidance before claiming funding.

EEA, Switzerland and the overseas territories

42: For funding eligibility purposes only, we have defined the EEA on 31 December 2020 as including Switzerland, as well as all members of the EU, Iceland, Liechtenstein, and Norway and each of their overseas territories as listed in Annex D: Defining EU, EEA and eligible overseas dependent territories as at 31 December 2020. Students who are citizens of certain British Overseas Territories are eligible for funding. Certain European Overseas Territories citizens will also be eligible for funding but only if they moved to the UK before 1 January 2021. Qualifying territories are listed in Annex D: Defining EU, EEA and eligible overseas dependent territories as at 31 December 2020.

Appendix 2 – Priority Groups 2-4 Income Thresholds

To determine the income thresholds applicable across Priority Groups 2-4, reference has been made to the national low-income threshold. A household is deemed to be low income where they live on 60% of the UK's median income

The median income for the UK based on the most recent 'People in low income households' government report was £39,039 as at March 2025 (see Figure 1). This has then been multiplied by 1.33 to provide an equivalised median income figure that takes the student into account as an additional member of the household (See Figure 2)

Priority Group 2 threshold: £39,039 x 1.33 = £51,922 x 0.6 = £31,153

Priority Group 3 threshold: £51,922 x 0.8 = £41,538

Priority Group 4 threshold: £51,922 (median income for UK household with one child)

Figure 1 (taken from ons.gov.ukStatista.com)

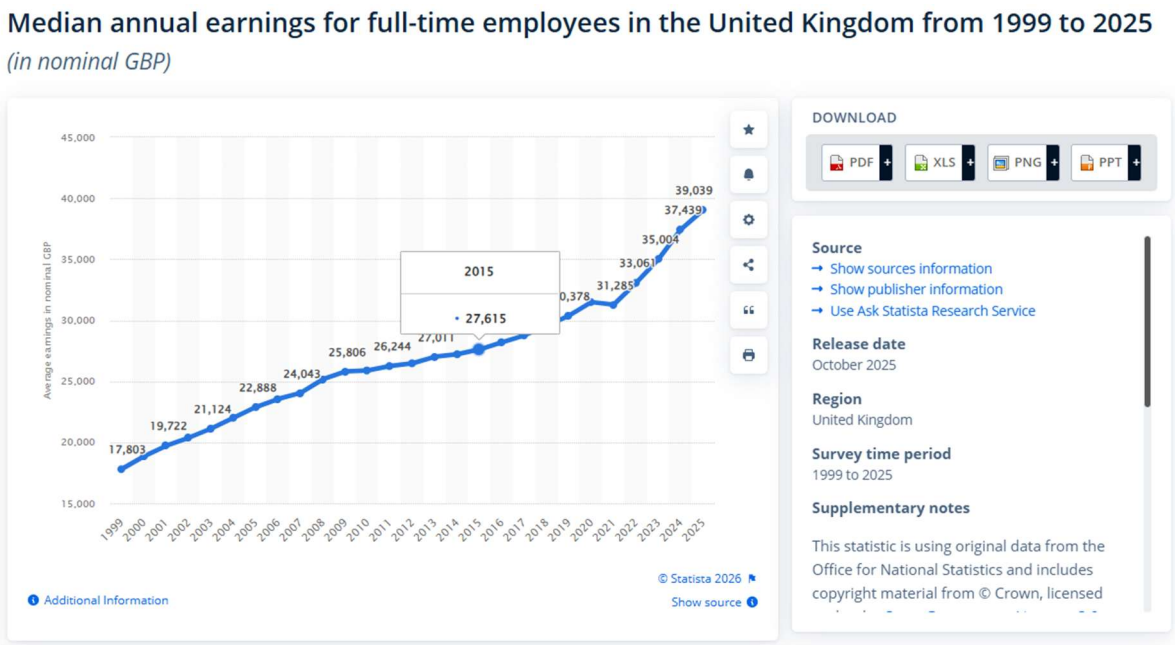
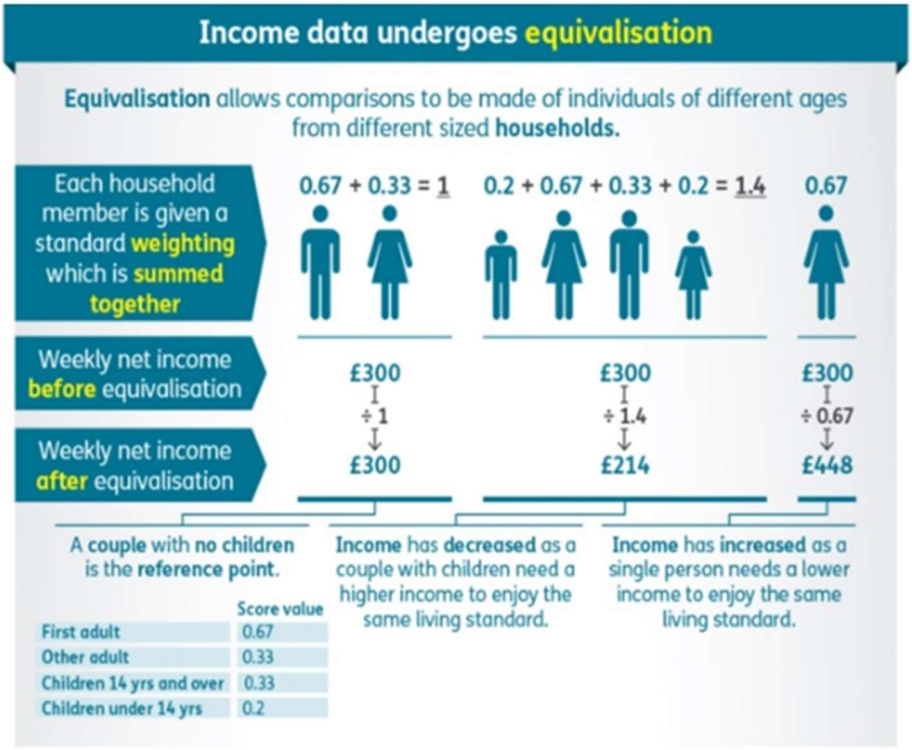


Figure 2



Equivalence scales

	Modified OECD to equivalise BHC results rescaled to couple without children=1[1]	OECD 'companion' Scale to equivalise AHC results	McClements BHC	McClements AHC
First Adult	0.67	0.58	0.61	0.55
Spouse	0.33	0.42	0.39	0.45
Other Second Adult[2]	0.33	0.42	0.46	0.45
Third Adult	0.33	0.42	0.42	0.45
Subsequent Adults	0.33	0.42	0.36	0.40
Children aged under 14yrs[3]	0.20	0.20	0.20	0.20
Children aged 14yrs and over[3]	0.33	0.42	0.32	0.34

Appendix 3 – Paper-based application form

Available from the academy

Appendix 4 – Private transport mileage rates

Engine size (cc)	Mean MPG	Fuel price (per litre)	Fuel price (per gallon)	Rate per mile	Advisory fuel rate
Up to 1400	51.0	138.7 pence	630.7 pence	12.4 pence	12 pence
1401 to 2000	42.3	138.7 pence	630.7 pence	14.9 pence	15 pence
Over 2000	27.1	138.7 pence	630.7 pence	23.3 pence	23 pence

Diesel

Engine size (cc)	Mean MPG	Fuel price (per litre)	Fuel price (per gallon)	Rate per mile	Advisory fuel rate
Up to 1600	56.9	146.1 pence	664.3 pence	11.7 pence	12 pence
1601 to 2000	49.3	146.1 pence	664.3 pence	13.5 pence	13 pence
Over 2000	38.0	146.1 pence	664.3 pence	17.5 pence	17 pence

LPG

Engine size (cc)	Mean MPG	Fuel price (per litre)	Fuel price (per gallon)	Rate per mile	Advisory fuel rate
Up to 1400	40.8	98.3 pence	446.9 pence	10.9 pence	11 pence
1401 to 2000	33.8	98.3 pence	446.9 pence	13.2 pence	13 pence
Over 2000	21.7	98.3 pence	446.9 pence	20.6 pence	21 pence

Electric

From 1 March 2025, the advisory electric rate for fully electric cars will be 7 pence per mile.

Electrical efficiency — miles per kilowatt-hour	Domestic electricity cost (per kilowatt-hour)	Rate per mile	Advisory electric rate
3.57	25.24 pence	7.06 pence	7 pence

The 'Domestic electricity cost per kilowatt-hour' is the Department for Energy Security and Net Zero annually published figure, uprated with the latest estimate of electricity prices from the Office for National Statistics.

Hybrid cars are treated as either petrol or diesel cars for advisory fuel rates.

The advisory fuel rates for petrol, LPG and diesel cars are shown in the following tables.

You can use the previous rates for up to 1 month from the date any new rates apply.

From 1 March 2025

Engine size	Petrol — rate per mile	LPG — rate per mile
1400cc or less	12 pence	11 pence
1401cc to 2000cc	15 pence	13 pence
Over 2000cc	23 pence	21 pence

Engine size	Diesel — rate per mile
1600cc or less	12 pence
1601cc to 2000cc	13 pence
Over 2000cc	17 pence

Electric — rate per mile
7 pence

Appendix 5 – Discretionary bursary funding calculation

10. Payments and allocations: discretionary bursaries

10.1 Allocations

We make discretionary bursary allocations to institutions that have a 16 to 19 contract or funding agreement each year.

If you operate from more than one location across England, or through subcontracts, we will make allocations to the lead office for distribution to each site. You should ensure that students attending provision delivered by subcontractors or at different sites can apply for the 16 to 19 Bursary Fund. The lead institution is responsible for ensuring the bursary fund is administered appropriately at each site and at any subcontractor to ensure students can access support.

The methodology for calculating discretionary bursary allocations has 2 elements.

10.2 Element 1: financial disadvantage

Element 1, disadvantage, is calculated based on students' home postcodes, matched against the Index of Multiple Deprivation (IMD) 2019 (https://www.gov.uk/government/statistics/english-indices-of-deprivation-2019). The IMD is a government index that uses statistics on education, crime, health, employment, and income to determine how disadvantaged an area is.

Financial disadvantage instance values are assigned to students living in the 27% most deprived areas of the country.

10.3 Element 2: a) student costs to support travel and b) industry placements

Element 2, student costs, is intended to provide a general indicator of the main costs faced by students.

Element 2a calculates an amount of funding for travel to support non-residential students whose home postcode is in the top 60% most deprived areas (based on IMD 2019). The calculation factors in the:

- rurality of the student's home postcode
- distance between the student's home postcode and the delivery location of their learning

Element 2b considers whether the student's industry placement through their participation on a T Level programme qualifies an institution for bursary funding. The calculation factors in the proportion of each institution's students whose home postcode is in the top 60% most deprived areas (based on IMD 2019). Only institutions approved to deliver T Levels in academic year 2026 to 2027 are in scope for this funding.

Both elements are based on analysis of data from academic year 2024 to 2025, to gauge the underlying student factors that inform an institution's academic year 2026 to 2027 discretionary bursary allocation.

These elements form part of the allocation methodology only. Your local bursary policies do not need to be split into these 2 elements or refer to them. There is no restriction between the different elements. You can use your allocation flexibly, to support the needs of your students.

The 16 to 19 funding allocation statement guides (https://www.gov.uk/government/publications/16-to-19-funding-allocation-statement-guides) explain how we calculate your 16 to 19 funding allocation.

In a small number of instances, we will use a 'by exception' process. For example, we may apply averages where there is no end of year data available. This will be made clear to any institutions affected.