

16-19 Bursary Policy 2026-27

1 Introduction

Step into Learning is committed to supporting learners in overcoming financial barriers to participation in education through the provision of the 16–19 Bursary Fund. This policy outlines the eligibility criteria, application process, evidence requirements, payment procedures, and attendance monitoring related to the bursary fund. It aims to ensure transparency, fairness, and accountability in the distribution of financial support to eligible learners.

2 Scope

This policy applies to all learners enrolled at Step into Learning who meet the eligibility criteria for the 16–19 Bursary Fund. It encompasses the administration and management of both the Vulnerable Bursary and the Discretionary Bursary, as well as procedures for evidence submission, payment processing, and attendance monitoring.

3 Definitions

Vulnerable Bursary: A bursary intended to support learners identified as vulnerable as per the criteria below. The bursary provides financial assistance for participation costs related to their education. The maximum for this is £1,200, though no learner will automatically receive this amount.

Criteria:

In Care:

- Learners aged 16-18 who are under the care of a local authority, either voluntarily or under a care order. This includes those placed with foster carers by the local authority but excludes private fostering arrangements.

Evidence required: Local Authority confirmation.

Care Leaver:

- Learners aged 16 or 17 who were in care for a consecutive period of 13 weeks or more, or learners aged 18 or older who were in care prior to turning 18 for a consecutive period of 13 weeks or more.

Evidence required: Confirmation from the relevant local authority.

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Universal Credit (UC) - formerly Income Support (IS):

- Learners aged 16-18 who receive UC or Income Support (IS) in their own right, supporting themselves and any dependents.

Evidence required: Most recent UC or IS statement in the learner's name, and most recent bank statement showing receipts of these payments.

Personal Independence Payments (PIP) - formerly Disability Living Allowance (DLA)

- Learners aged 16-18 receiving PIP, alongside UC or ESA, are eligible.

Evidence required: Most recent UC statement, the PIP Award Notice and most recent bank statement showing receipt of these payments.

Young Parent – Care to Learn Funding

- Learners under 20 who are the main carer and in receipt of Child Benefit. Only one parent can claim if both are in education.

Evidence required: Copy of Child's Birth Certificate; Child Benefit letter; evidence that childcare is Ofsted registered and not government-funded early years; invoice from provider with times and costs; most recent bank statement showing receipt of Child Benefit payment.

Discretionary Bursary: Learners who do not qualify for the Vulnerable Bursary may apply for a discretionary award.

Criteria:

Income Threshold

- Full Bursary: Household income up to £25,521, including **all** benefits. This is the amount awarded before deductions are made.
- Partial Bursary: Household income up to £28,000 including **all** benefits. This is the amount awarded before deductions are made. This entitles you to transport costs only.

Additional Criteria

Learners aged 19+ may still be eligible if they are either:

- A "19+ continuer" (continuing the same programme started aged 16–18), or
- Have an Education, Health and Care Plan (EHCP).

Allocation Process: Awards are based on individual assessment of needs and available funds.

Permissible Uses of Funds: Assistance with expenses such as travel, essential books, equipment, or specialised clothing necessary for participation in the programme.

Limitations on Fund Usage: Funds cannot be used for non-essential purposes or to provide a competitive advantage.



How to Submit a Universal Credit Statement:

1. **Log in:** Go to the Universal Credit website and sign in to your account.
2. **Find the Payments section:** On your account homepage, locate the "Payments" section.
3. **View your statement:** Click on the most recent month's statement to view its details.
4. **Download or print:** You can then print or save the statement as a PDF. You may need to select "Print this statement" and then choose "Save as PDF".
5. **Repeat the process:** If you need to access further statements, repeat the process for the previous two months.

We do not take into account the payment received each month; we look at the total entitlement before deductions to calculate your income so the full pdf is needed.

Evidence Required

Three months evidence of income (wages or benefits)

- Summary of Earnings for the last three months if self-employed. E.g. HMRC Self-Assessment
- Three most recent months UC Statements (JSA/ESA if you have not been transferred to UC). This must be the full statement showing name, address, date of payment, total entitlement and any deductions made.
- Carer's Allowance letter
- Housing Benefit entitlement
- Pension income, if applicable

Three most recent months bank statements, evidencing all income received. This may require sending of statements from more than one account.

PIP Award letter, if applicable for the applicant or learner, please note any PIP award is not included as income.

4 Policy Statement

Eligibility:

The Vulnerable Bursary is available to learners meeting specific criteria, including being in care, care leavers, or receiving designated benefits.

The Discretionary Bursary is available to learners with demonstrated financial need.

Specific evidence is required to verify eligibility for both the Vulnerable and Discretionary Bursaries.

Allocation Principles:

Needs Assessment: Bursary funding allocation is based on a comprehensive evaluation of the actual needs of each learner. The support provided will be tailored to address individual needs rather than applying a one-size-fits-all approach.

Flexible Funding Structure: Payments are allocated dynamically based on the individual financial circumstances of learners, ensuring funds are allocated to reflect their actual costs.

Ongoing Needs Evaluation: Eligibility and financial need will be reviewed each academic year. Where household income evidence is not reassessed annually for discretionary bursaries, learners may be required to complete a signed declaration confirming that circumstances remain unchanged.

Targeted Support: Both discretionary and defined vulnerable group bursaries aim to alleviate financial barriers and help learners meet the costs of education.

Step into Learning will not make blanket, flat-rate, or automatic bursary payments. All awards will be based on assessed actual costs and individual financial need.

Vulnerable Bursary:

Option 1: In Care This category includes children aged 16-18 under the care of a local authority, either voluntarily (under section 20 of the Children Act 1989) or under a care order (under section 31 of the Children Act 1989). A "looked after child" as defined by section 22 of the Children Act 1989 is eligible for support under this category. This encompasses young individuals placed with foster carers by the local authority, including cases where the foster carer is associated with an independent fostering agency.

Option 2: Care Leaver Individuals aged 16 or 17 who were previously in care for a continuous period of 13 weeks, commencing after the age of 14 and concluding after the age of 16, as well as those aged 18 or above who were in care prior to turning 18 for a similar period, are considered care leavers eligible for support.

Evidence Requirements: For applicants falling under the "in care" or "care leavers" categories, documentation confirming their current or past looked-after status from the relevant local authority is necessary. This verification, which can be in the form of a letter or email, must be directly from the responsible local authority.

Option 3 or 4: Universal Credit This pertains to individuals aged 16-18 receiving universal credit, wherein they financially support themselves and any dependents, such as children or partners, living with them. Bursary funds awarded under this category should not be considered in the universal credit assessment conducted by the Department for Work and Pensions (DWP). The treatment of such funding by the DWP depends on whether the learner is engaged in advanced full-time education.

Evidence of entitlement to a specified benefit, along with details of the calculation, is required. For learners receiving universal credit or income support, a copy of their award notice, clearly indicating the claim in their name, is necessary. The most recent bank statement evidencing these payments will be required. Additional documentation, such as a tenancy agreement, child benefit receipt, or utility bills, may be required for verification purposes.

Claimants of universal credit can obtain details of their award from their online account or provide a screenshot to the institution. Learners may also seek assistance from their UC Work Coach or relevant Benefit Office if receiving IS or ESA in obtaining evidence of benefit receipt.

It is the responsibility of the learner to provide accurate and complete evidence of their eligibility for the Vulnerable Bursary. Failure to provide the required documentation may result in the application being deemed incomplete and not processed. This eligibility criteria section outlines the specific circumstances under which learners may qualify for the Vulnerable Bursary, ensuring transparency and fairness in the allocation of financial support.

Option 5: Care to Learn – this enables young parents (defined as those aged under 20) to continue in education after the birth of a child. The scheme provides funding for childcare whilst the young parent is engaged in a study programme and is not able to provide care for their child. It can also help the young parent with any additional travel costs involved in taking the child to the childcare provider. C2L can also provide funding for childcare whilst young parents are on work placements or industry placements, where these are a defined part of the study programme.

The young parent must be the main carer and in receipt of Child Benefit for the child(ren) for whom they are claiming C2L. If a young parent loses custody of their child(ren), even temporarily, they must notify SIL immediately. The mother or father of the child can claim C2L as long as:

- the other parent is unable to provide childcare, for example, they are also in education or are absent
- the other parent is not claiming childcare paid through any other source, for example, government funded early years places or Childcare Tax Credits

Discretionary Bursary

Applicants are required to provide evidence of their total household income for the last three months, encompassing all income and benefits received by parent(s), carer(s), and partner(s). However, income from siblings and grandparents within the household, unless acting as a primary carer, is excluded from this calculation. PIP payments are exempt from consideration when assessing household income. Additionally, submission of the applicant's last three months bank statements will be required.

We regularly review our bursary policies to ensure continued support for learners in need. This includes recognising that individuals from households supported by lower-income jobs may face greater financial challenges compared to those receiving benefits like free school meals. Each application undergoes an assessment of individual need to determine appropriate support.

Applying:

To apply for either the Vulnerable or Discretionary Bursary, learners must complete an application pack, available from tutors, administrators, or the website on this link:

<https://stepintolearning.org.uk/16-19-bursary/>

It is your responsibility to ensure that the application is fully completed and all evidence is submitted; incomplete applications will not be processed. Upon processing your application, we will notify you of the outcome. For updates on your application status, please contact accounts@stepintolearning.org.uk

Step into Learning reserves the right to request additional evidence where necessary but will aim to minimise administrative burden on learners wherever possible.

Any application found to contain false or misleading information may result in withdrawal of bursary support and recovery of funds where appropriate.

Applications can be submitted upon enrolment or at any time throughout the year. However, payments will be pro-rata depending on the application date, with backdating limited to one calendar month.

Due to limited funding in the Discretionary Fund, we cannot guarantee full or partial funding for applicants. Therefore, learners are encouraged to seek alternative financial assistance from other agencies, organisations, and funds. Funding is intended to support essential participation costs connected to education and training and will not normally be used for non-essential living or recreational expenses. Applications will be assessed based on eligibility, individual financial need, and available funding. Step into Learning reserves the right to prioritise learners facing the greatest barriers to participation. Once funding is fully allocated, a waiting list system will be implemented.

Applications for the Vulnerable Bursary will be assessed based on eligibility, individual financial need, and available funding. Step into Learning reserves the right to prioritise learners facing the greatest barriers to participation. Funding claims for successful



applications are expected to be processed by the DfE in February 2027 following completion of their assessment and verification procedures. Reimbursements for eligible costs will begin once funding has been received by Step into Learning.

For both funds

Applicants are required to provide their bank account details for the payment of awards. It is the responsibility of the applicant to ensure the accuracy of the provided bank details. We accept evidence such as a copy of a bank paying-in slip or bank card to validate the bank account information. We cannot be held accountable for payments not reaching the nominated account due to incorrect bank details provided by the applicant. Second payments will not be issued in such instances. As per our retention policy, all documents submitted for bursary evidence will be securely retained for a period of 6 years. Original documents will not be accepted, and we cannot assume responsibility for any loss of evidence.

Payments:

Vulnerable Bursary payments are processed monthly based on attendance, and receipt of invoices or proof of purchase.

Discretionary Bursary payments are made monthly upon receipt of invoices and confirmation of monthly based attendance.

Bank account details must be provided for payment processing.

Transport:

Bursary payments can be used toward transport costs, but they do not replace statutory transport obligations of local authorities. Relevant transport arrangements and costs must be indicated on the application.

Attendance:

Learners' attendance and engagement are monitored on an ongoing basis as part of bursary eligibility. A minimum attendance expectation of 95% per month is normally required for Discretionary Bursary payments; however, this will be applied flexibly and in line with individual circumstances. Payments may be adjusted or withheld where attendance is consistently poor and there are no valid mitigating circumstances. Mitigating factors such as authorised absence, illness, safeguarding concerns, caring responsibilities, additional learning needs, and other exceptional circumstances will be considered on a case-by-case basis.

5 Decision, Reviews and Appeals

Notification of Decisions:

You will typically receive notification of our decision and any fund allocation via email. No payments will occur until we confirm your enrolment on the course in September. Payments will be directly deposited into the bank account details you provide. Please forward all receipts for claiming the awarded amounts.



Decision-Making Process:

Decisions concerning the disbursement or withholding of funds from the 16-19 Bursary Fund, as well as the determination of payment amounts, will be made by our administrators in adherence to government guidelines governing fund administration.

Appeals Process:

If you disagree with the outcome of your review, you have the right to appeal. Your appeal must be submitted in writing within 21 days from the date of the review outcome. Clearly state your reasons for appealing and address your appeal to Finance Administrator– Jo Tucker initially. If you remain dissatisfied, you may escalate your appeal to the Lead IQA, Siobhan Robbins.

Appeals will be acknowledged via email and we aim to respond within 7 working days.

Note: Appeals will not be considered if the decision was due to fund exhaustion.

Fair Procedures:

Our procedures are designed to ensure that learners can express individual or collective concerns without fear of repercussions. We uphold privacy and confidentiality in these matters.

Audit Evidence:

Step into Learning will maintain auditable records of bursary decisions, including eligibility evidence, needs assessments, calculation of support awarded, receipts where required, attendance evidence, and payment records