KATHARINE LADY BERKELEY'S SCHOOL
FOUNDED 1384

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Katharine Lady Berkeley's School Post 16 Bursary 2026/2027 Policy and Application Form

1. Introduction

The 16-19 Bursary Fund is paid by the Education Funding Agency (ESFA) to Schools and Colleges so that they may provide financial help to students whose access to or completion of education might be inhibited by financial considerations.

Each school has been allocated a fixed sum of money for the 16-19 Bursary Fund. This will vary from year to year.

Students who are eligible must **apply by Friday 11th September** and must also supply the required evidence to support the application. This fund is designed to help support those young people who face the greatest barriers to continuing in education post 16. The fund has two elements: the vulnerable bursary for vulnerable young people and the discretionary Bursary for young people facing financial barriers to participation. These funds can be used by the students to help pay towards the costs related to participation in full-time education, such as transport, educational visits, university open days, interviews, books equipment and school meals.

2. Criteria and Eligibility

*5% of the total funding available for 2026/27 will be held back for administration and 15% of the total funding will be held back for applications that are received after the deadline of 11th September (i.e. change of circumstances & new students). To be considered for the first round of bursary applications this deadline must be met.

(A) Vulnerable Bursaries

Eligible students will be awarded up to £1200 Bursary to support with costs such as public transport, equipment, trips, school meals, and books based on actual financial need.

- Are currently in care (as defined by Social Services)
- Are leaving or have recently left care
- Are in receipt of Income Support (or Universal Credit) in their own name
- Are disabled and in receipt of both Employment Support Allowance and Disability Living Allowance (or Personal Independence Payments)

Please note: Original sources of evidence will be required by the school. **DO NOT SEND PHOTOCOPIES**

(B) Discretionary Bursaries: The remaining sum* will be allocated as follows:

Eligible applicants are identified as falling under one of the three bands:

Band A – Students who have successfully claimed Free School Meals for the current academic year or whose Household income is less than £21, 700.

Eligible students in this group will be entitled to funding (amount dependent on the number of eligible

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applications) to contribute towards the cost of transport, essential course equipment, trips, materials, books etc. up to a value of £900 per year.

Band B – Students whose household income is less than £26, 800

Eligible students in this group will be entitled to funding (amount dependent on the number of eligible applications) to contribute towards the cost of transport, essential course equipment, trips, materials, books etc. up to a value of £600 per year.

Band C - Students whose household income is less than £33, 500

Eligible students in this group will be entitled to funding (amount dependent on the number of eligible applications) to contribute towards the cost of transport, essential course equipment, trips, materials, books etc. up to a value of £400 per year.

DISCRETIONARY BURSARY

Parents/Carers/Students may approach the school for assistance at any time in case of hardship (including sudden or temporary circumstances); these cases will be dealt with on a case by case basis.

What can I spend my bursary on?

The bursary is intended to help meet education-related costs that enable you to attend and participate fully in your study programme, including but not limited to the following:

- Text books or other books related to your subjects*
- School resources*
- Stationery / revision aids*
- Essential School trips and visits
- School lunches (money will be added to your cashless catering account for use in the canteen)
- School bag, shoes, clothing or equipment
- Transport costs – petrol contribution (based on home-school mileage)
- Exam fees
- Entrance exam costs
- Open days including travel

*Any educational resources bought under the bursary scheme should be returned to the school upon completion of the course.

How do I spend my bursary?

There are three ways to spend your bursary:

- Buy/pay for the item yourself and reclaim the funds from your bursary. Complete the "Bursary Reimbursement Form" and hand it into the Finance Office who will process a refund into your bank account within a week. Remember to check before you buy your item that it is included in the list of approved items. Forms available from the finance Office or via website.

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- Ask the school to order the item for you and pay for it directly from your bursary. Complete the Bursary Order Form and hand in to the Finance Office. The order will be placed and you will be contacted via your school email account when the item is available to collect.
- School lunches. We will add money to your cashless catering account, please contact K Arkell on kjarkell@klbschool.org.uk if you require money to be added to your account. This option is not available if you already have free school meals

4. Conditions of Funding

Students will be reviewed at the end of each month (re: their attendance, timekeeping and conduct) throughout the year. In order for funds to be authorised, students must have **no unauthorised absences**.

The payments for the bursary will be paid/reimbursed providing the student has met the criteria below:

- No unauthorised absences
- Attendance of at least 90% during the 4 week period being assessed
- No more than 2 late marks over the 4 week period
- No issues of poor behaviour

Also students are required to have their own bank account, BACS payments will only be made to the student.

Students who are eligible for this funding should be aware that the additional financial support they receive in the form of the grant must be used to help off-set costs directly linked to their education.

Students will also be required to inform the school of changes in their financial circumstances.

5. In Year Applications

Applications after 11th September will be allocated from the contingency fund. An estimate of the "residual funds" figure will be made and the same criteria applied. This means that Discretionary Bursary allocations may vary according to the "residual funds" available during the year. Applications outside of the first application window will also be pro rata based on the student enrolment date.

6. Procedure for Application

To make an application, students/parents/carers should complete the application form and return this to Miss K Arkell, in the Finance office. Students are advised to clarify that they have the correct evidence before submitting their application forms as inadequate evidence will not be accepted and the student may not then qualify for the first round of allocations, which will significantly reduce their eligibility payments. **If you are in year 12 going into year 13 and circumstances have not changed, please complete the declaration form.**

Once the application form is complete with the evidence of eligibility attached, these should be placed in an envelope marked 'Private and Confidential' for the attention of Miss K Arkell. The applications will then be logged and checked. Each claim will be considered and a decision made in accordance with the fund guidelines.

All information supplied will be treated in the strictest confidence throughout the process and all original documentation will be returned once the applications have been verified.

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Bursary Fund 2026/27 Application Form

STUDENT DETAILS

Student's name	
Home address	
Postcode	
Contact number	
Email contact	
Date of birth	
Subjects Studying	
How do you travel to School (Car, Bus etc)	

BANK DETAILS (Student)

Account Name	
Address	
Account Number	
Sort Code	

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Parent Details

Two parent household

Parent 1 Name	
Occupation	
Parent 2 Name	
Occupation	
Home address	
Postcode	
Contact number	
Email contact	

Single Parent Household

Parents Name	
Occupation	
Home address	
Postcode	
Contact number	
Email contact	

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Please tick the box/boxes which apply:

Vulnerable Bursary:

- ☐ Young person in care
- ☐ Care Leavers
- ☐ Young people **personally** in receipt of income support/universal credit
- ☐ Disabled young person in receipt of Employment Support Allowance who are also in receipt of disability allowance

Evidence required (please Tick)

A letter from DWP that states the benefit the student is entitled to (they must be entitled to the benefits in their own right).	
Students who are in care or a care leaver, written confirmation of their current or previous looked-after status from the relevant local authority. The evidence could be a letter or an email but must be clearly from the local authority Institution.	
Universal Credit Notice (3 most recent monthly award statements) Or Income Support	
Disability Living Allowance (or Personal Independence Payments)	

Please note: Evidence must be less than 3 months old. Original sources of evidence will be required by the school. **DO NOT SEND PHOTOCOPIES**. If you are in receipt of Tax credits or Universal credit please only send these forms as that's all the information we need.

Discretionary Bursary:

- ☐ Band A: Household annual income less than £21, 700 or successfully claim free school meals
- ☐ Band B: Household annual income less than £26,800
- ☐ Band C: Household annual income less than £33,500

Evidence required (Please tick)

Certified letter from the Local authority regarding Free School Meals eligibility	
P60 or 3 Months bank statement's (Please also include paperwork of benefits)	
Tax Credit Award Notice (form TC602)	

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Universal Credit Notice (3 most recent monthly award statements)	
State pension credit	
Self-Employment Income statement	

Please note: Evidence must be less than 3 months old. Original sources of evidence will be required by the school. DO NOT SEND PHOTOCOPIES

Your application cannot be processed without proof of income.

I have read and agree fully to the terms and conditions. I have attached original evidence as required. I certify that the information given above is true and accurate. I further understand that the School has the right to reclaim any funds and equipment costs, if I am found to have provided incorrect information or do not complete the course. I confirm that all relevant equipment, such as laptops and books, will be returned to the School at the end of my course.

Parent Signed: …….. Date: …….

Student Signed: …….. Date: …….

You will be notified whether your application has been successful.

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