16 – 19 Bursary Fund Policy

Adopted: September 2026

Approved by:	Trust Board	Author:	Executive Director Education
Reviewed in:	September 2026	Date of Adoption:	July 2025
Next review due:	September 2027		

1. Introduction

This policy is rooted in our Lumero (the Trust) values:

Excellence

Holding the highest of standards: we have great aspirations for our children and young people, encouraging them to seek out and take hold of opportunities

Collaboration

Stronger together: we commit to sharing expertise to empower and inspire all individuals to thrive in a global world

Inclusion

Celebrating and respecting the diversity in our communities: we have a shared expectation in everyone to achieve in an ever-changing world

Lumero aims to attract, retain, develop outstanding teaching, and support staff. Staff will have access to fair pay progression, high-quality professional development and career pathways irrespective of age, race, religion, gender, gender reassignment, disability, marriage, and civil partnership, pregnant and maternity, beliefs, sex or sexual orientation, or socio-economic background.

Lumero is committed to:

- Promoting equality and diversity in its policies, procedures, and guidelines
- Ensuring staff are protected from unlawful direct or indirect discrimination resulting from a protected characteristic (e.g., age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex, or sexual orientation).
- Delivering high-quality teaching and services that meet the diverse needs of its pupil population and its workforce, ensuring that no individual or group is disadvantaged.

Lumero Educational Trust is committed to ensuring that students facing financial barriers to participation in education are supported to achieve their potential. The 16-19 Bursary Fund is designed to help students aged 16-19 with the costs associated with continuing their education. This policy sets out the key principles and requirements for the administration of the 16-19 Bursary Fund across all schools within the Trust. Each school will develop its own internal procedures, including specific application processes, aligned with this policy and national guidance.

2. Scope

This policy applies to all schools and academies within Lumero Educational Trust that provide education to students aged 16-19. It ensures compliance with the Education and Skills Funding Agency (ESFA) guidelines for the 2026-2027 academic year.

3. Key Principles

Across our family of schools, our use of the Bursary Fund is rooted in three key principles:

- The Bursary Fund is intended to support students who face genuine financial barriers to participation in education.

- Schools must use the fund to help students with essential costs such as transport, meals, books, equipment, and other education-related expenses. These costs should reflect items that a student would otherwise need to pay for to participate in their programmes of study.
- The Bursary Fund cannot be used for costs unrelated to education, such as general household expenses, living costs or social activities. The funds cannot be used to provide learning support such as counselling or mentoring, or to pay for extra-curricular that are not essential.

4. Categories of Bursary

The Trust recognises the two main categories of bursary, as set out in the ESFA guidance:

4.1 Bursaries for vulnerable groups

These are available to students in specific vulnerable groups, as defined by the ESFA:

- Students in care or care leavers.
- Students receiving Income Support or Universal Credit in their own right.
- Students receiving Disability Living Allowance (DLA) or Personal Independence Payment (PIP) in their own right, alongside Employment and Support Allowance (ESA) or Universal Credit.

Since 2025/26, schools nationally have needed to submit funding claims for the defined vulnerable group bursary directly to the DfE at defined points in the year, using their DfE Sign-Ins.

In 2026/27, the DfE's guidance sets out the following windows:

- The first funding claim window to **open on 7 September 2026** and **close on 11 November 2026**. Payments will be made in February 2027 (March for academies)
- The second funding claim window to **open on 4 January 2027** and **close on 10 February 2027**. Payments will be made in April 2027 (May for academies)
- The third and final window to **open on 17 May 2027** and **close on 30 June 2027**. Any final additional payments will be made in September 2027 (October for academies)

Eligible students may receive bursary support of up to £1,200 per academic year, based on an assessment of their actual financial need and eligible participation costs. Eligible status alone does not automatically entitle a student to £1,200

4.2 Discretionary Bursaries

These are awarded at the discretion of each school to students facing financial hardship but not eligible for a vulnerable bursary. Schools must target discretionary bursaries to students most in need, considering factors such as household income and additional costs associated with education.

Awarded based on financial need. Factors considered include:

- Total household income.
- Number of dependents.

- Exceptional circumstances (e.g., young carers, homelessness).

- Specific costs such as travel, books, meals, or course equipment.

- Each school will define thresholds and eligibility evidence in its appendix.

The discretionary bursary fund can be used in cases of severe hardship for meal support on the days the student attends, without doing the usual household income and evidence checks. For 2026/27, the national guidance extends this flexibility to travel support too.

Emergency support should be a temporary arrangement only – you should still undertake a full discretionary bursary assessment later.

For audit purposes, you must retain a copy of:

- A record of the number of students with emergency meal or travel support
- A record of the number of days emergency meal or travel support is given
- The value in pounds given to each student and the reason
- The signed confirmation by the student that they have received the funding to be spent on food or travel

5. Requirements and Prohibitions

5.1 General Requirements

- Schools must assess each application individually, using clear and transparent criteria. This criteria should be published on each school's website and reviewed annually.
- Funding must be targeted to students with the greatest need, and awards must reflect the actual costs students face.
- Schools must have procedures in place to check and retain evidence of eligibility, such as proof of income or benefits.
- Where possible, schools should pay both the defined vulnerable group and discretionary bursaries to students in-kind rather than cash. Examples of 'in-kind' payments include: travel passes, vouchers or credits for meals, required books and equipment.
- Payments must be conditional on the student meeting agreed standards, such as attendance, punctuality, and behaviour. This is to ensure that students are attending the provision and are, by extension, incurring the costs as anticipated.

5.2 Prohibited Practices

- Schools must not make flat-rate payments to all students, regardless of need. Payments can be regular and made directly to students, but the amount of such payments should be based on each individual student's unique needs, as determined by the school.
- Schools must not make flat-rate payments to students in particular income bands or to students whose families are in receipt of particular benefits. Payments can be fixed and regular but not flat-rate – they should be unique to the assessed needs of the applicant.
- Schools should not make large or lump sum bursary payments to students. Payments should be regular to support students to manage their finances.
- The bursary fund cannot be used for:
  - Fees for tuition or exams.
  - Staff salaries or administrative costs not directly related to managing the bursary scheme.
  - General savings or contingency funds.
- Schools must not carry over unspent bursary funds into the next academic year unless agreed with the ESFA.

6. Administration and Accountability

- Each school must establish a fair and transparent process for assessing and approving applications. Procedures must include clear deadlines, appeals mechanisms, and methods for notifying students of decisions.
- In line with the guidance, Lumero schools can exercise discretion as to whether to carry out household income eligibility annually, or just at the start of a student's study programme. If schools choose not to carry out annual checks, students must sign and date a self-declaration that their household circumstances have not changed.
- Schools must maintain accurate records of applications, evidence provided, decisions made, and payments issued. These records must be retained for audit purposes.
- Schools must regularly review their procedures to ensure compliance with this policy and the ESFA guidance.

7. Appeals and Complaints

Students and families have the right to appeal decisions regarding bursary applications. Each school must provide a clear process for handling appeals and complaints, which should be communicated to all applicants. This should be reflected in each school's complaints policy.

8. Monitoring and Reporting

- Schools must monitor the distribution and impact of bursary funding to ensure it is used effectively and in line with ESFA guidance.
- The Trust will periodically review compliance across its schools and provide support where needed to ensure consistency and adherence to this policy.

9. Policy Review This policy will be reviewed by the Trust following each update to the Bursary Guidance to ensure it remains compliant and meets the needs of students.

Appendices

- Each school within the Trust must attach its own internal procedures as an appendix to this policy. These procedures should include:
    - Specific eligibility criteria and evidence requirements.
    - Application forms and submission processes.
    - Payment methods and schedules.
    - Monitoring and review processes.

This policy has been approved by the Lumero Educational Trust Board and will take effect from the start of the Autumn Term 2026/27.