



Bursary Policy

Updated: 03-19
Prepared by: JUH

Next Review: 03-20
Authorised by: SHCC

This Policy applies throughout the School from the EYFS to Year 6.

Introduction

The School is a registered charity that is committed to providing public benefit and is aware of its obligations under the Charities Act 2011. This Policy is reviewed on an annual basis to take into consideration the latest guidance from the Charity Commission and any other factors relevant to this Policy.

The Governors of the School are committed to broadening access to the School by offering to eligible parents or guardians means-tested financial support towards the payment of tuition fees. Such support is known as a bursary and bursaries may be awarded in the form of a discount of up to 100% on tuition fees payable, depending on the financial, compassionate or other pertinent circumstances of applicants. Additional activities, such as After School Care, clubs and individual music lessons, are not included in bursary awards.

Bursary awards are subject to repeat testing of parental means each year and may be varied upwards or downwards, depending on parental circumstances. Awards are made on the basis of the School's confidential scale of awards which sets out award levels in relation to a family's financial circumstances. The scale of awards is reviewed and revised annually by the Bursar to reflect any changes in fee costs and is approved by the Governors. Though awards are generally tied to this scale, they may be varied upwards or downwards depending on parents' or guardians' individual circumstances (e.g. their savings, investments and realisable assets as well as their income, the size of their family, any other persons dependent upon them and like factors), compassionate or other pertinent considerations.

Requests for financial support usually fall into two categories:

1. New applicants to the School where a place has been offered but parents or guardians are unable to fund the tuition fees.
2. Existing pupils where a change in parents' or guardians' circumstances has resulted in difficulty in meeting tuition fees and may result in the pupil being withdrawn part way through a stage of education.

1. New Applicants

Information alerting the parents or guardians of potential pupils to the possibility of gaining means-tested financial support with the payment of the School's fees is included on the School's website.

The Application Process

Bursaries for new applicants may be made available to parents of pupils entering the School in Year 3 or above and to parents of existing pupils from Nursery or above. They are awarded at the discretion of the Governors; the Headteacher and Bursar are responsible for the management and co-ordination of the process.

- **Step one:** parents or guardians seeking a bursary are required to undergo a financial review with Bursary Administration Limited which seeks to establish the financial circumstances of the household. Details of income and capital will be sought and must be accompanied by full documentary evidence. A representative from Bursary Administration Limited will visit the parents' or guardians' home(s) to ensure the information has been correctly interpreted and the basis of the financial assessment has been fair
- **Step two:** the Bursar assesses the financial review in order to establish the likely level of support which will be required in order to allow the potential pupil to attend the School
- **Step three:** the Bursar prepares a recommendation which is considered with the Headteacher and a joint recommendation is then reached
- **Step four:** the joint recommendation is presented to the Governors for approval
- **Step five:** the parents or guardians are advised whether their child is to be offered a place at the School and of the bursary award.
- **Step six:** parents or guardians are then required to sign a letter accepting the place at the School, if not already a pupil, and an acknowledgement agreeing to any conditions relating to the bursary award.

The case for assistance

A number of factors will be considered when making the judgement as to the justification for support and the extent of such support. Bursary funds are limited and those given priority will be those likely to gain most from our educational provision. Due to the limited financial resources of the School, not every eligible application will be successful.

- **Suitability:** in assessing a potential pupil's suitability, prime attention will be given to the School's ability to accommodate any special educational and/or welfare needs of the potential pupil
- **Financial limitations:** the amount of the bursary award is influenced by the extent of need. Each case is assessed on its own merits and awards are made accordingly subject to the School's ability to fund these within the context of what is viable within the context of its overall budget. It is recognised that judgements about what sacrifices a family should make to pay school fees will be personal. However, the School has a duty to ensure that all bursary awards are well focused and so, as well as current earnings, other factors which will be considered in determining the necessary level of grant will include:
 - The ability to improve the financial position or earning power of the family. For example, where there are two partners, both would be expected to be employed unless one is prevented from doing so through incapacity, the need to care for children under school age or other dependents or the requirements of their partner's work
 - Opportunities to release any capital. Significant capital savings and investments would be expected to be used for the payment of school fees as would equity values in houses
 - In cases of separation, the contribution made by the absent parent

- Contribution to household costs by other, wider, family members, any adults unrelated to the potential pupil or by outside sources
- Where fees are being paid to other schools (or universities), the bursary offered will take into account all these outgoings
- Acknowledging that others might have a different view, the School considers that the following would not be consistent with the receipt of a bursary:
 - frequent or expensive holidays
 - new or luxury cars
 - investment in significant home improvements
 - a second property/land holdings
- **Other factors:** it is recognised that, in addition to perceived ‘fit’ and financial constraints, there may be other circumstances which should be considered. These include:
 - Where a potential pupil has siblings at the School
 - Where the social needs of the potential pupil are relevant (e.g. may be suffering from bullying at their present school)
 - Where a parent is terminally ill or is unable to secure permanent employment due to poor health

2. Existing pupils - change in family circumstances

Within overall budget funding, the School will in normal circumstances set aside each year a hardship fund for cases of sudden and unforeseen need, e.g. where a parental separation results in a pupil potentially having to be withdrawn from the School adding to the stress of coping with the separation. Parents or guardians with a child at the School whose financial circumstances suddenly change may make a written request to the Chair of Governors to be considered for a bursary, explaining their situation. Such awards are subject to the availability of funding and cannot be guaranteed.

Annual review

All bursary awards are subject to repeat testing of parental means each year and may be varied upwards or downwards depending on parental circumstances. Current bursary holders will be issued with repeat means-testing forms at the end of the spring term each year for return by the start of the summer term. For those previously in receipt of bursaries, the Headteacher and Bursar, in making their joint recommendation to the Governors, have the discretion to recommend the reduction or withdrawal of an award not only where a pupil’s progress, attitude or behaviour has been unsatisfactory but also where the parents or guardians have failed to support the School, for example by the late payment of any contribution they are making to the fees.

Should any information disclosed in response to the annual review become inaccurate at a later date, the School must be informed without delay. Failure to divulge a change in circumstances could lead to a bursary being withdrawn or withheld.

Senior school registration fees

At the Headteacher's discretion, assistance may be available with the registration fees for prospective senior schools. Parents and guardians are encouraged to discuss this with the Headteacher in advance of senior school registration deadlines.

Confidentiality

The School respects the confidentiality of families to whom bursary awards are made and recipients are expected to do likewise.

Data Protection

Bursary applications are processed on behalf of the School (the data controller) by Bursary Administration Limited (the data processor) in accordance with data protection law¹. Bursary Administration Limited has provided the School with its Data Protection Policy. A copy of Bursary Administration Limited's Data Protection Notice for applicants is provided to parents and guardians with the bursary application form(s). Parents and guardians should be aware that the Information Commissioner's Office has advised that the report produced by Bursary Administration Limited for the School is exempt from Subject Access Request provisions.

Linked Policies

- Admissions Policy

¹ General Data Protection Regulation (EU 2016/679), the UK Data Protection Act 2018 and related legislation, The Privacy and Electronic Communications Regulations 2003 and the Protection of Freedoms Act 2012.