

ST MARGARET'S PREP



ST MARY'S CALNE

## Bursary Policy

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## Bursary Policy

### 1. Introduction

The Governors of St Mary's and St Margaret's ('the School') are committed to broadening access to both schools by offering to eligible families' means-tested support with the payment of school fees. Bursary support at all levels of up to 110% of full boarding fees may be available depending on the financial, compassionate or other circumstances of applicants.

All such awards are subject to annual review of parental means and may be varied upward, downward, or removed entirely, depending on circumstances. Parents / legal Guardians who wish to apply for a bursary will be asked by the School to complete a Confidential Statement of Financial Circumstances form. The form is confidential and requires full information about the family's financial circumstances, with supporting documentation. At present the School uses an external organisation called the Bursary Administration Ltd (BAL), to review and assess bursary applications. Shortly after receipt of the application form, BAL will arrange an appointment with applicants to discuss their application.

### 2. New Entrants to the School

This policy is available on the School website, alerting parents to the possibility of gaining means-tested financial support with the payment of school fees.

### 3. Categories of financial support

Requests for financial support usually fall into two categories:

- i. Applicants to the School whose parents/guardians are unable to afford the full fees;
- ii. Existing pupils where a change in parents/guardians circumstances has resulted in difficulty in meeting the full fees and may result in the child being withdrawn part way through a stage of the education at the School.

Bursary support is not linked to scholarship awards. However, all families are eligible to apply for a bursary to supplement other discounts available at the School. Other discounts available are:

- Military discount – see Appendix B.
- Sibling discount – see Appendix B.
- Scholarships – see Appendix B.

#### 4. The Application Process

Bursaries may be made available to parents or guardians of children entering any year-group from Year 3 at St Margaret's and from LIV at St Mary's. Bursaries are awarded at the discretion of the School, and the Head and Bursar are responsible for the management and coordination of the process.

- Step One: Completion and submission of the application form to BAL. This should be done no later than **early December** of the year preceding entry.
- Step Two: Assessment of each application in order to establish the level of support required. This will involve a meeting with BAL in order to ensure that the information has been correctly interpreted and the basis of the financial assessment has been fair.
- Step Three: Consideration of all applications by the Bursary committee.
- Step Four: Parents/guardians to be advised of their suitability for an award. This process will be completed by **mid-March**. All awards will be dependent upon the pupil satisfying the School's academic entrance requirements.
- Step Five: Parents/guardians are then required to sign an agreement accepting the award and the terms and conditions related to it.

#### 5. Eligibility for Awards

In order to ensure that the means testing is undertaken as carefully as possible, the School has engaged a third party organisation (BAL) that is experienced in undertaking means testing. BAL are responsible for undertaking the means-tested assessment, but the final decision about whether to award a bursary, and at what level, rests with the School. Once a bursary is awarded the amount is not influenced by the academic ability of the child but 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 its overall budget. It is recognised that judgements about what sacrifices a family should make to pay school fees will be subjective. The School has a duty to ensure that all bursary grants are well focused and so, as well as current earnings, other factors will be considered in determining the necessary level of grant.

These might 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 contributions made by both parents.
- contribution to household costs by other, wider, family members, any adults unrelated to the child or by alternative sources.
- the level of regular household spending (for example food, clothing etc) above average expectations, without provision of extenuating circumstances.

Acknowledging that others might have a different view, the School considers that indications of wealth such as 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;
- high value capital assets such as luxury watches, valuable works of art or other high value

luxury items.

It is recognised that in addition to academic ability and financial constraints there may be other circumstances which should be considered. These might include:

- the social needs of the child (e.g. the personal circumstances of the child mean that the provision of boarding will materially help them);
- where a parent is terminally ill or is unable to secure permanent employment due to poor health.

#### **6. Suitability of Applicant**

Bursary funds are limited and priority will be given to those likely to gain most from the educational provision. The potential contribution of the candidate to the wider School community will also be taken into consideration, as will the likely impact of the award on the enhancement of the candidate's educational opportunity. References from the candidate's current school will form part of the process.

#### **7. Existing Pupils – Change in Family Circumstances**

Within overall budget funding the School will, in normal circumstances, set aside funds each year for cases of sudden, unforeseen need or where applications meriting bursary assistance are received out of the normal calendar cycle. This sum will be set within budgetary constraints. Parents or guardians with a child at the School whose financial circumstances suddenly change may apply for a bursary explaining their situation and requesting assistance. Such awards are subject to the availability of funding, the suitability of the candidate and may be limited to completion of a school year or the next stage of education.

#### **8. Annual Review**

The School reserves the right to undertake, via BAL, a means-tested review of all bursary awards each year. Following such reviews, any bursary award may be varied upwards, downwards, or removed entirely, depending on parental circumstances. Current bursary holders will be issued with repeat means-testing forms during November for submission to BAL in early December. For those previously in receipt of bursaries, the School may reduce or withdraw an award not only where a pupil's progress, attitude or behaviour has been unsatisfactory but also where the parents/guardians have failed to support the school, for example by the late payment of any contribution they are making to the fees, or if the School has been made aware of a potential change in a family's financial circumstances or a family's expenditure habits (please see section 5 above).

#### **9. Confidentiality**

The School respects the confidentiality of bursary awards made to families and recipients are expected to do likewise. In certain circumstances, recipients and their families may be asked to share their stories in order to demonstrate the impact of bursary support to supporters and other stakeholders, to demonstrate the impact of bursary support. These stories will not be shared without written consent from the beneficiary and parent or guardian.

#### **10. Other Sources of Bursary Assistance**

In addition to the School's funds, there are some educational and charitable trusts which provide assistance with tuition fees. In the majority of cases, these are to assist children who

are already attending a fee-paying school but due to a change of circumstances may be unable to remain. The School encourages parents to apply for such support where it is felt a good case can be made for assistance. Further information may be obtained from:

The Educational Trusts Forum <http://www.educational-grants.org/>

The Educational Trusts' Forum started in the early 1980s as the Joint Trusts' Liaison Committee. It changed its name in 1988. Its membership comprises registered charities that are prepared to consider grants and awards to assist families in need who cannot afford educational or boarding fees. Pupils may be at independent schools or state schools where a boarding fee is charged.

#### **11. Data Protection**

By using an external organisation to assist with processing bursary applications, information provided by applicants may be made available, in confidence, to that organisation for those purposes. All personal data processed in connection with the School's arrangements for bursaries shall be processed in accordance with the School's Privacy Policy which is available on the School's website and is otherwise available from the School upon request.

## Appendix A – Bursary Conditions of Award

1. **Grant of the Award:** An Award is granted at the sole discretion of the School.
2. **Obligations of the pupil:** A pupil who is the subject of an Award is required to work hard, to contribute positively to the life of the School, to be a credit to the School and to set a good example to other pupils. The pupil must adhere to the School's required standards of conduct, attendance and progress. These are the *Purposes of the Award*.
3. **Obligations of the Parent/s:** The parents are required to:
  - 3.1 support and encourage the pupil to achieve the Purposes of the Award; and
  - 3.2 treat the School and its staff reasonably and to uphold the aims and the good name of the School; and
  - 3.3 comply with the School's Terms and Conditions.
4. **Means tested Awards:** All means tested Awards will be subject to annual review and the parents shall each year be required to complete a financial means questionnaire. After any annual review, the School reserves the right to remove or vary the value of the award with immediate effect and will confirm this in writing to the Parents.
5. **Continuation of the Award:** Continuation of the Award is dependent upon the following conditions being fulfilled:
  - 5.1 parents satisfy the School's financial requirements each year, and
  - 5.2 the financial resources allocated by the School to support the Award being sufficient to maintain the Award; and
  - 5.3 it being in the financial interests of the School as a whole to maintain the Award.
6. **Confidentiality:** The value and terms and conditions of the Award shall remain confidential between the parents and the School.
7. **Termination of the Award:** The Award may be terminated on the following grounds:
  - 7.1 **Termination on financial grounds:** The School may terminate the Award on one term's notice if, in the opinion of the School acting in good faith:
    - 7.1.1 The parents have not satisfied the School's financial requirements under paragraphs 4 and 5.1 above; or
    - 7.1.2 The School is no longer able to continue the Award under paragraph 5.2 above. The termination will take effect from the date set out in the written notice.
  - 7.2 **Termination on the grounds of conduct:** The School may terminate the Award by written notice sent to a parent with immediate effect if, in the opinion of the School acting in good faith, one or more of the following conditions has been fulfilled:
    - 7.2.1 A pupil has not complied with the obligations set out in paragraph 2 above and in the further opinion of the School there has been no significant improvement following consultation with a parent and/or the pupil and a written warning; or
    - 7.2.2 A parent has not complied with the obligations set out in paragraph 3 above; or
    - 7.2.3 The value and terms and conditions of the Award do not remain confidential in accordance with paragraph 6 above; or
    - 7.2.4 The pupil is withdrawn without a term's written notice.
  - 7.3 **Repayment of the Award:** A parent may be required to repay all or part of the benefits received under the Award if it is terminated in any of the following circumstances:

- 7.3.1 Under clause 7.1.1. above if a parent has knowingly or recklessly provided false or inaccurate information about their financial position, all benefits received from the date on which the false or inaccurate information was supplied may be repayable; or
  - 7.3.2 Under clause 7.1.2. above, if a pupil has been found to have committed a serious breach or series of persistent minor breaches of School discipline for which the sanction would normally be expulsion or required removal, up to three terms' benefits (if received) may be repayable.
8. **Fees in lieu of notice:** For the avoidance of doubt, the benefit receivable under an Award will not apply to any term for which the School has required payment of fees in lieu of notice.
9. **Terms and Conditions:** These Conditions of Award take precedence over any of the School's Terms and Conditions which are inconsistent with them but in all other respects the Terms and Conditions as amended from time to time shall apply and these Conditions of Award shall be interpreted in accordance with them.

## **Appendix B – Other discounts**

### Military Discount

Serving members of the regular armed forces will automatically receive a 10% discount for any of their children enrolled at St Mary's or St Margaret's.

This discount is not means-tested and will remain in place for the duration of the child's education at the School without review, so long as the parent(s) remain serving members of the regular armed forces. However, other than the annual review and means-testing elements, the discount will be subject to all the other terms set out in Appendix A. Recipients will be required to sign a declaration confirming their military service.

Recipients of a Military Discount are eligible to apply for a bursary award to supplement their Military Discount.

### Sibling Discount

At St Margaret's, a second child will be eligible for a 5% discount whilst there are two siblings enrolled at the same time. Any third or more children of the same family will be eligible for 15% discount whilst there are three or more siblings enrolled at the same time.

This discount is not means-tested but will be reviewed annually to assess how many children from the family are still enrolled. Other than the means-testing element, the discount will be subject to all the other terms set out in Appendix A.

Recipients of a Sibling Discount are eligible to apply for a bursary award to supplement their Sibling Discount.

### Scholarships

There is no financial support available for pupils who are awarded scholarships.