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# Bishop Challoner School



## **Bursaries Policy and Procedures**



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### Bursaries Policy and Procedures

#### *Policy Statement*

Bishop Challoner School is committed to allocating funds to enable pupils to continue to access the full educational services, provided by the school, during times of financial need.

The total amount of funding made available for bursary awards will be approved by the Trustees. The Headteacher will determine the level of individual awards based on the financial recommendations of the Bursar.

Bursaries are a reduction of school fees and are means-tested. They are awarded to parents in order to support the education of pupils who would otherwise not be able to afford an independent school education. The school recognises the recommendations of the Charities Commission regarding the requirements of public benefit required of an educational charity by providing this commitment.

Bursaries are awarded in the form of a discount on tuition fees payable by families. Non-financial factors may also be taken into consideration; examples include the size of an applicant's family, any other persons dependent upon them, compassionate or other pertinent circumstances of applicants. Bursary support is based on an assessment of financial circumstances. It considers capital assets as well as income, investments and savings. It also makes allowances for dependents and other relevant considerations.

The level of the award is determined both by the family's financial circumstances and the total number of eligible bursary applications that the school receives. The level of award is reflected as a percentage of the fees and the amount may vary depending on the circumstances. Bursaries will not normally be awarded below Year 5, unless in exceptional circumstances.

Timelines are to be adhered to so that predicted expenditure can be incorporated into the budget for the following year. However, applications after the published deadline may be considered at the discretion of the Headteacher. The Timelines are as follows:

- September entry- Penultimate week of summer term
- January entry- Penultimate week of autumn term
- April entry- Penultimate week of spring term

### ***Eligibility***

Requests for financial support are accepted from all, but finite resources are favoured to existing pupils where a change in parents/guardians' circumstances has resulted in difficulty in meeting tuition needs and may result in the child being withdrawn part way through a stage of education.

Parents/Guardians must provide the documentary evidence requested on the bursary application form. (See Appendix 1)

For existing parents, any award made is conditional on the clearance of existing debts, or, in the event of the applicant being unable to make an immediate repayment, subject to a repayment proposal for the old debt. Failure to make any promised repayments may result in the removal of the bursary award. This condition is made to ensure that the awards are used as a beneficial means of going forward for parents/guardians, rather than just prolonging a financial problem. Bishop Challoner School recognises that it would be irresponsible to encourage parents/guardians to take on unaffordable debt.

Award decisions will also be dependent on previous good behaviour. Awards may subsequently be withdrawn where a pupil's attitude or behaviour has later been unsatisfactory (see "Review of Bursary Awards" below).

All Bursary Awards are made subject to acceptance of the Terms and Conditions (see Appendix 2A) in relation to the award. Failure to sign, or a breach of the Terms and Conditions, may result in the removal of the award and parents/guardians could be liable to repay any previous benefit from an award.

### ***The Application Process***

Bursary applications are accepted throughout the year. Applications will be presented to the Headteacher for consideration, and the school will aim to determine the awards for the following term by the penultimate week of the term in which the application is received. (Given the length of the Summer holiday, late applications *may* be considered during this period for awards in the Autumn Term, although the availability of funding cannot be guaranteed.) Awards will not be backdated.

Awards are made at the discretion of the Trustees who entrust the Headteacher and Bursar to be responsible for the management and coordination of the process.

Step One. Parents may apply for a Bursary using the form available from the Bursary Office. This form seeks to establish the financial circumstances of the household and must be accompanied by full documentary evidence. Completed forms and evidence should be submitted to the Bursar.

Step Two. The documentary evidence is analysed by the Bursar who makes his recommendations regarding financial need to the Headteacher.

Step Three. The Headteacher and the Bursar assess all applications to establish the likely level of support required in order to allow the pupil to attend the school.

Step Four. The Headteacher prepares a recommendation of awards, and the size of each individual award, based on the funding available, the level of support requested and non-financial factors. In producing this list, the Headteacher has regard for the Selection Criteria listed below.

Step Five. The school aims to advise parents/guardians whether their child is to be offered a Bursary, and the size of any such award, by the penultimate week of term.

Step Six. Should a bursary be offered, parents/guardians are required sign the Terms and Conditions relating to the Bursary which they will be expected to fulfil.

### ***Evidence Required***

All applicants must provide the documentary evidence requested on the bursary application form. (See Appendix 1, Section 11, VERIFICATION OF INCOME.)

### ***Selection Criteria***

The Headteacher will consider a number of factors when making a decision as to the justification for support and the extent of any such support. Each application is considered 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 its overall budget. It is recognised that judgements about what sacrifices a family should make to pay school fees will be personal. However, Bishop Challoner has a duty to ensure that any financial support it offers is well-focused and targeted towards those most in need; hence the requirement for documentary evidence. Factors considered include, but are not limited to the following:

### ***Financial Need.***

The amount of the award is not influenced by the academic ability of the child, but by the extent of need. Consideration is given to the ability to improve the financial position or earning power of the family; opportunities to release capital (including investments and significant equity value in houses); in cases of divorce or separation, the contribution made by both parents; any contribution to fees or other household costs by other, wider family members; any adults unrelated to the child or from outside sources; any fees being paid to other schools (or universities) for siblings.

***Non-Financial Factors.*** Non-financial factors which could influence a bursary decision include (but are not limited to):

- Where a child has siblings at the School
- Where the social needs of the child are relevant
- Where a parent/guardian is terminally ill or is unable to secure permanent employment due to poor health
- Where a separation has resulted in the child having to be withdrawn from the School adding to the stress of coping with the parents/guardians separating

### **Suitability of the child to the school**

Attention is given to the academic assessment result of each applicant, but potential is also considered as well as actual achievement. Bursary funds are limited, so if all other factors are equal, those judged likely to gain most from the education provision will be given priority. Pupils to whom support is offered must, in the opinion of the Headteacher, be likely to make sound academic progress and possess the potential to develop the quality of his or her work and benefit from participation in the wider, extra-curricular activities on offer at the school. However, it should be noted that Bursary awards do not fund chargeable extra-curricular activities. Most applicants should meet the school's normal academic requirements and previous school reports will be consulted for evidence of good behaviour.

### ***For 11+, 12+, 13+, 14+ entry***

Pupils will undergo the normal entry testing procedure and may be selected for scholarship interviews in addition. Any receipt of a scholarship will be added to the offer of the means tested Bursaries. In the case of giftedness in the arts (music or drama for example), applicants may prepare a practical piece. For external applicants the pupil's current Headteacher should write in support of his/her application.

### ***For 16+ entry***

Pupils will be academically assessed as per the normal admissions procedures. All applicants should be supported by a letter of commendation from their current school (complete with accurate GCSE predicted grades). Provisional offers will be made subject to success in GCSE exams in the summer of Y11. Again, the current Headteacher should write in support of the pupil's application.

### ***Review of Bursary Awards***

All Bursary awards are subject to a termly review. As a minimum, current bursary holders will be issued with repeat means testing forms at the beginning of June each year for return, along with the requested documentary evidence, by the end of the month. A standard means test will be applied at the end of each term to confirm the continuation of the award through to the next term and may be varied upwards or downwards, or withdrawn depending on the financial circumstances of the family.

Awards are reviewed to reflect changes in fee costs. Within overall budget funding, the school will consider applications for cases of sudden, unforeseen need where applications meriting assistance are received out of the normal cycle for the submission, scrutiny and award of bursaries. In such cases, the sum will be set within budgetary constraints.

In addition to a financial review, the Terms and Conditions relating to the Bursary award allow the Headteacher to reduce or withdraw an award where a pupil's progress, attitude or behaviour has been unsatisfactory, where any conditions attaching to the award have not been met or where parents have failed to support the school, for example by the late payment of any contribution they are making to the fees.

All awards are subject to the school's ability to fund them within the context of its overall budget and cannot therefore be guaranteed.

The bursary will be withdrawn and the value of any amount of the bursary previously credited against the pupil's fee account will become repayable to the school forthwith if the parents/guardians have fraudulently, knowingly or recklessly provided false information in relation to the award of the bursary.

***Confidentiality***

The school respects the confidentiality of bursary awards made to families, and recipients (parents and pupils) are expected to do likewise.

**Reviewed by:** David Rolls, Mark Wallace

**Review Date:** August 2024

**Next Review Date:** August 2025