



BURSARY POLICY

Date: Sep-2020

Review Date: Sep-2021

Authority and Circulation

This policy has been authorised by the Governing Body of Sarum Hall School ("the School"). Its status is advisory only. This policy contains an overview of the Bursary Scheme currently in operation at the School and is made available to parents of pupils and of prospective pupils on request.

General

The School is a registered charity that is committed to providing public benefit. The School is aware of its obligations under the Charities Act 2006 and seeks to adhere to the public benefit principles identified by the Charity Commission. 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 are committed to broadening access to the school by offering to eligible parents/guardians means-tested financial support with the payment of schools fees. Such support is known as a Bursary and these 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.

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 a detailed assessment of a family's financial circumstances and will always be dependent upon individual parents/guardians' 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.

Funding available for the award of bursaries by the School is strictly limited and cannot be guaranteed for any new applications at any stage. Subject to repeat testing, a degree of priority will be given to the renewal of awards to existing recipients rather than to new applicants.

Requests for financial support usually fall into two categories:

- New applicants to the school where parents/guardians are unable to fully fund the tuition fees.
- Existing pupils where a change in parents/guardians' circumstances has resulted in difficulty in meeting tuition fees and may result in the child being withdrawn part way through a stage of education.

New Applicants to the School

Awareness

Information provided by the School alerting the parents/guardians of potential pupils to the possibility of gaining means-tested financial support with the payment of schools fees is included on the School website and the School listing on the ISC website.

The Application Process

Bursaries may be made available to parents/guardians of children entering any year-group of Sarum Hall, although awards for entry into the Nursery class will normally only be made under exceptional family circumstances. They are awarded at the discretion of the Governors and the Head and School Bursar are responsible for the management and coordination of the process.



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- **Step One.** Parents/guardians seeking a bursary are required to complete an application form which seeks to establish the financial circumstances of the household. The form requests details of income and capital and must be accompanied by full documentary evidence. The completed forms, together with the necessary documentary evidence, must be returned as indicated no later than 5 working days before the **date of appointment with the Head** in any year for bursaries to start the following September. Applications that are received after the meeting with the Head may not be considered.
- **Step Two.** The Bursar will commence the second stage of the means-testing process. This will involve an assessment by an independent means-testing company, "Bursary Administration Limited", who will provide the School with a report and a recommendation.
- **Step Three.** The recommendation will be presented to the School Governors for approval as appropriate.
- **Step Four.** The parents/guardians are advised whether their child is to be offered a place at the School and of the Bursary offer.
- **Step Five.** Parents/guardians are then required to sign a letter accepting the place at the School and an acknowledgement agreeing to any conditions relating to the bursary.

The Case for Assistance.

The School will consider a number of factors when making the judgement as to the justification for support, and the extent of such support. In the main, the child's suitability for the School is the first consideration in granting support.

- **Suitability.** Bursary funds are limited and those judged most suitable will be given priority as those likely to gain most from the educational provision. Each pupil to whom support is offered must, in the opinion of the Head, be likely to make sound academic progress following admission and possess the potential to develop the quality of her work, and benefit from participation in the wider, extra-curricular activities on offer at the School. In addition, the School needs to be confident that a bursary pupil will be successful in their senior school entrance exams in Year 6, and the family are likely to have their bursary application looked upon favourably by the chosen senior school. Each applicant should meet the School's normal entrance requirements. Previous school reports will be consulted for evidence of good behaviour.
- **Financial Limitations.** The amount of the bursary award is determined by the extent of need. Each case is assessed on its own merits and awards are made accordingly, subject to the School's available funding. 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 grants are well focussed 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.



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- Opportunities to release any capital. Significant capital savings and investments would be expected to be used for the payment of school fees, as would substantial equity 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 child or by outside sources.
 - Where fees are being paid to other schools (or universities) the School's grant 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 the child's potential and family financial constraints, there may be other circumstances which should be considered. These include:
- Where the social needs of the child are relevant (eg: may be suffering from strained relationships at their present school).
 - 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.

Existing Pupils - Change in Family Circumstances

Parents/guardians with a child at the School whose financial circumstances suddenly change may apply for Emergency Fee Assistance to the Bursar, explaining their situation and completing the relevant application form. Such awards are subject to a similar process as with new admissions to the School detailed above and are equally subject to the availability of funding and cannot be guaranteed.

Annual Review

All bursary and emergency fee assistance 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 early in the Easter Term each year so that decisions regarding the continuation of an award may be made before the end of the Easter Term. For those previously in receipt of bursaries, the Head and Bursar, in making their joint recommendation to the School Governors, have the discretion to recommend to the Governors 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/guardians have failed to support the school, for example by the late payment of any contribution they are making to the fees.

Confidentiality

The School respects the confidentiality of bursary applications and awards made to families and recipients are expected to do likewise. Data is held in compliance with Data Protection legislation. More information can be found in our Privacy Notice available [here](#).



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Other Sources of Bursary Assistance

In addition to the School's bursary funds, there are a number of educational and charitable trusts which provide assistance with tuition fees although the majority of these do seek to provide assistance to children at senior schools. In the majority of cases, these are to assist children who are already attending a fee-paying school and, due to a change of circumstances, may be unable to remain. Sarum Hall encourages parents/guardians to apply for support where it is felt a good case can be made for assistance. Further information on how to pursue such assistance may be obtained via the website of the Educational Trusts' Forum at <http://educational-grants.org> which maintains a list of charities who may be able to assist.