



## Chafyn Grove School

### Policy & Process for the Award of a Bursary

#### Introduction

The Governors at Chafyn Grove School are committed to broadening access to the School by offering to eligible parents/guardians means-tested financial bursary support with the payment of school fees. Bursary awards may be made for a specified number of terms, a year or, exceptionally for longer than a year. Awards are made at the discretion of the Bursary Review Committee comprising of the Headmaster, the Bursar, Head of Finance and a panel of Governors. The award is based upon the family's financial circumstances and may be varied upwards or downwards depending on individual parents/guardians' circumstances (e.g. their savings, investments and realisable assets, as well as their income, the size of their family and any other persons dependent upon them etc), compassionate or other pertinent considerations.

Requests for financial support usually fall into two categories:

- New registered applicants to the school, where a place has been offered and a Registration Fee paid, but parents are unable to fund the tuition fees and/or other costs in full or part.
- Hardship bursaries for existing pupils where a change in parents' circumstances has resulted in difficulty in meeting tuition fees and may result in the child being withdrawn part way through a stage of education.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 Bursary Awards

Bursary awards are subject to the availability of annual budget funding and cannot be guaranteed for all new applications. The Bursary Rewards Committee will consider a number of factors when making a judgement to the justification for support of new applications to the School, and the extent of such support, as follows:

**Suitability:** In assessing a child's suitability, academic potential will be considered, as well as evidence of a child's current attainment, ascertained by school reports and assessments. Bursary funds are limited and those judged likely to gain the most from the educational provision will be given priority. Each pupil to whom support is offered must, in the opinion of the Headmaster, be likely to make sound progress following admission, and possess the potential to develop the quality of his or her academic work, as well as benefit from participation in the wider, extra-curricular activities on offer at the school.

**Financial Limitations:** The amount of the bursary award is not influenced by the level of the 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 personal. However, the school has a duty to ensure that all bursary grants consider current earnings as well as other factors which will be considered in determining the necessary level of grant such as:

- The ability to improve the financial position or earning power of the family. For example, where there are two partners, *both parents would be expected to be employed* unless one is

prevented from doing so through incapacity, such as the need to care for children under school age or other dependents.

- 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, especially on second properties.
- In cases of separation, the contribution made by the absent parent.
- The disclosure of contribution to household costs by other family members, any adults unrelated to the child or by outside sources.
- Where fees are being paid to other schools (or universities), the School will reasonably expect that bursary funding should also be explored with other sibling education providers to the same or equal value.
- The School is unlikely to make a bursary award for children in Early Years or Pre-Prep (from nursery up to the end of year 2) whilst the fees are considerably more affordable. This is based upon the long-term commitment to independent education and the sustainability to be able to afford future fee increases.
- Acknowledging that others might have a different view, the school considers that the following examples would not be consistent with the receipt of a bursary and may trigger a bursary review to establish whether financial support from the School is still required:
  - **Frequent or expensive holidays.**
  - **New or luxury cars.**
  - **Investment in significant home improvements.**
  - **A second property/land holding.**
  - **Other significant discretionary expenditure.**
  - **Fee payments made by others.**

**Other Factors:** It is recognised that, in addition to a child's ability and financial constraints, there may be other circumstances which should be considered. These include:

- Whether a child has siblings at the School.
- Whether the social needs of the child are relevant.
- If a parent is terminally ill or is unable to secure permanent employment due to poor health.

Parents should be aware that bursaries are usually allocated on entry and that if a bursary is not granted on entry to the School, a subsequent grant of a bursary is highly unlikely unless there is a significant and demonstrable change in circumstances. It is recommended that parents should therefore not take up a place if they feel that they cannot afford to pay the fees, particularly from year 4 and upwards, nor should they have an expectation that once a pupil has joined the School, the decision not to award bursary funding might be reversed.

All new applicants need to complete all Registration paperwork and pay a Registration Fee at the school before a bursary application can be carried out.

### **Hardship Bursaries**

Parents with a child at the School whose financial circumstances suddenly change may apply for a hardship bursary. This must be a significant new situation that has emerged since the child started at the school, such as illness, redundancy, divorce or separation. Such awards are subject to the availability of funding and cannot be guaranteed. It is likely that any such hardship awards will be time-limited, usually for one term or some other natural break.

Where awards are made for a specific period it is the responsibility of the parents to make contact with the Head of Finance, if an extension of support is sought, at least half a term before the funding is due to end.

## **The Bursary Application Process**

- **Step One:** Parents seeking a new or Hardship Bursary are required to contact the Head of Finance who will set them up as a user on the bursary portal, where all of the financial information required can be uploaded. This process seeks to establish the financial means of the household and whether this is sufficient to pay all, some or none of the required school fees. The information supplied on the portal must be accompanied by uploaded documentary evidence, such as bank and mortgage statements.
- **Step Two:** All applications are assessed by BAL Ltd who specialise in carrying out financial assessments in order to establish the likely level of support which would be required in order to allow the child to attend or to continue at the School (in the case of Hardship Bursaries). This may involve a visit to the parents' home by BAL Ltd to ensure the information has been correctly interpreted and the basis of the financial assessment has been fair.
- **Step Three:** BAL Ltd send a report to the School which is then considered termly by the Bursary Review Committee.
- **Step Four:** The parents are advised by the Head of Finance whether their child is to be offered a bursary or not.
- **Step Five:** Parents offered a bursary are required to accept the offer and agree to any conditions relating to the bursary by return email to the Head of Finance.

Unsuccessful cases are usually the result of either lack of evidence of financial need, concern about the appropriateness of the family making a long-term commitment to fee paying or insufficient availability of bursary funds. There is no appeal process following the Committee's decision but at the same time no bar to reapplication.

## **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 and school circumstances. If the information requested on the bursary portal is not completed by the required deadline and no satisfactory explanation is received, the award will cease at the end of the current academic year. For those previously in receipt of Bursaries, the Bursary Review Committee have the discretion to 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 fees. The School may require parents/guardians in receipt of a Bursary to submit additional mid-year information when more up to date financial information/details becomes available, such as a P60 issued by employer post April year end.

The School also reserves the right to withdraw any award retrospectively if the pupil is withdrawn prior to their normal leaving date.

## **Confidentiality**

The School respects the confidentiality of Bursary awards made to families and recipients are expected to do likewise and not share details with anyone other than family members and financial advisors. The obligation to make full disclosure of any change in circumstances relevant to the eligibility for the existing award is binding upon signing the acceptance form. If the School becomes aware or is made aware that the information provided is not accurate, the Bursary award may be amended or terminated the following term. In all circumstances, parents/guardians are bound by the Schools standard Terms and Conditions including the requirement to give a full term's notice of withdrawal from the School before the normal leaving date.