



# **Bursary Policy (Whole School including EYFS)**

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## **Independent Day School**

## **Our Lady of Sion School**

Last reviewed: January 2021

Frequency of Review: 3 years

Next Review: January 2024

## Means-tested Bursaries

The governors of Our Lady of Sion School 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 bursaries may be awarded in the form of a reduction against 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. 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 individual parents'/guardians' circumstances (eg, 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:

- New applicants to the school where a place has been offered but parents/guardians are unable to fund the full 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parents'/guardians' circumstances has resulted in difficulty in meeting tuition fees and may result in the child being withdrawn part way through a stage of education.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 in:

- the school website
- the local press by means of advertisements.

## The Application Process

Bursaries may be made available to parents/guardians of children entering any year-group of Our Lady of Sion School. 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.

- 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, which requests details of income and capital, may be found at Annex A, and must be accompanied by full documentary evidence. The completed forms, together with the necessary documentary evidence, are to be submitted to the Bursar no later than the end of spring half term for bursaries to start the following September.
- Step two - the Bursar assesses all applications in order to establish the likely level of support which will be required in order to allow the child to attend the school. This may involve the Bursar, or their representative, visiting the parents'/guardians' home to ensure the information has been correctly interpreted and the basis of the financial assessment has been fair.
- Step three - the Bursar prepares a recommendation in accordance with the school's scale of awards which is considered with the head and a joint recommendation is then reached.
- Step four - the joint recommendation is presented to the Governors for approval.
- Step five – **First Monday in March**. The parents/guardians are advised whether their child is to be offered a place at the school and of the bursary offer.

- Step six - 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 Headteacher and Bursar 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 - in assessing a child's suitability, attention will be given to the academic assessment result of each applicant but potential will also be considered as well as actual achievement. 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 their work and benefit from participation in the wider, extra-curricular activities on offer at the school. In normal circumstances, each applicant should meet the school's normal academic requirements. Previous school reports will be consulted for evidence of good behaviour. Pupils will also be considered in the context of their pastoral needs, and how attaining a place at Our Lady of Sion School, will be beneficial to them.

Financial limitations- the amount of the bursary award is not influenced by the level of 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 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 grants 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.
- 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 award 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 academic ability and financial constraints, there may be other circumstances which should be considered. These include:

- where a child has siblings at the school;
- where the social needs of the child are relevant (eg, may be suffering from bullying 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**

Within overall budget funding, the school will in normal circumstances set aside each year a hardship fund, for cases of sudden, unforeseen need or where applications meriting bursary assistance are received out of the normal calendar cycle for Bursary submission, scrutiny and award. This sum will be set within budgetary constraints. Parents/guardians with a child at the school whose financial circumstances suddenly change may apply to the Bursar, explaining their situation and using the forms at Annex A. 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 in January each year for return by the end spring half 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 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 awards made to families and recipients are expected to do likewise.**

Please note the statement around confidentiality which appears in the Terms and Conditions published in the Acceptance Form (sent to you in the offer documentation by the Admissions Registrar).

*In accepting a bursary, parents must agree that they will keep the award of it and its terms strictly confidential between themselves and the school and will not discuss it or make it known outside their immediate family.*

**Approved by Chair of Governors 10.2.21**