

# Means-Tested Bursaries Policy

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## General

The Trustees of Hollygirt School are committed to broadening access to the school by offering to eligible parents/guardians means-tested financial support with the payment of school fees. Such support is known as a bursary and these may be awarded in the form of a discount of between 10% and 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. Savings, investments and realisable assets, as well as income, the size of family, any other persons dependent upon them, compassionate and any other personal circumstance are taken into consideration.

Requests for financial support usually fall into two categories:

- Year 7 applicants to the school where parents/guardians are unable to fund the full tuition fees.
- Existing pupils where a change in parents/guardians' circumstance has resulted in difficulty in meeting tuition fees and may result in the child being withdrawn part way through a stage of their education.

## New Applicants

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 school fees is included in:

- The school prospectus
- The school website
- The conversation the Headmistress has with parents during their initial visit to the school

## The Application Process

Bursaries may be made available to parents/guardians of children entering Year 7 (*See Admissions Policy*).

They are awarded at the discretion of the Trustees, Headmistress and Bursar who are responsible for the management and coordination of the process.

1. Parents/guardians seeking a bursary are required to complete an application form which seeks to establish the financial circumstances of the household. This form, which requests details of income and capital 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 January in any year for bursaries to start the following September.

2. 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 her representative, visiting the parents/guardians' home to ensure the information has been correctly interpreted and the basis of the financial assessment has been fair.
3. The Bursar prepares a recommendation in accordance with Hollygirt School's Scale of Awards which is considered with the Headmistress and a joint recommendation is then reached.
4. The joint recommendation is presented to the Finance Committee of the Trustees for approval.
5. At the end of February or as soon as possible following the meeting of the Finance Committee, parents/guardians are advised whether their child will be made a bursary offer. This is supplementary to the standard offer which is usually made in January.
6. 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 Headmistress 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 potential of each applicant. 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 Headmistress, 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 life of the school. Previous school reports will be consulted for evidence of good behaviour and character.

#### **Financial Limitations**

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 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.
- 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 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
  - Expensive hobbies/leisure pursuits

### **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 or unforeseen situations or where applications meriting bursary assistance are received out of the normal calendar cycle for bursary submissions. This sum will be set within budgetary constraints. Parents/guardians with a child at the school whose financial circumstances suddenly change may apply for a bursary to the Bursar explaining their situation and filling in the means-tested bursary forms. 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. The Headmistress' letter offering the support must make clear that the award is reviewable. Current bursary holders will be issued with repeat means-testing forms during the Spring Term each year for return by the end of the term. For those previously in receipt of bursaries, the Headmistress and Bursar, in making their joint recommendation to the Finance and General Purposes Committee of the Trustees have the discretion to recommend to the Trustees 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. This will be expressed to them in writing in the Headmistress' letter offering the financial support.

### **Other Sources of Bursary Assistance**

In addition to the school's bursary fund, there are a number of 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 and due to a change of circumstances may be unable to remain. Hollygirt School encourages parents/guardians to apply for support where it is felt a good case can be made for assistance. Many can be accessed at [www.educational-grants.org](http://www.educational-grants.org).

## **Policy Review**

This policy will be reviewed annually by the Trustees.

*Unchanged August 2020*