



## Abbey Gate College

| POLICY: Bursary    |                       |
|--------------------|-----------------------|
| Scope              | Whole College         |
| Responsibility     | Head                  |
| Reviewed & Updated | September 2024        |
| Governor Approval  | James Brown (Finance) |

### CONTENT HYPERLINKS

[Policy Statement \(1\)](#)

[Policy Statement \(2\)](#)

[Key Personnel](#)

[New Applicants](#)

[The Application Process](#)

[The Case for Assistance](#)

[Existing Pupils - Change in Family Circumstances](#)

[Annual Review](#)

[Confidentiality](#)

### **Policy Statement (1)**

- 1) The Governing Body of Abbey Gate College is committed to broadening access to education at the College by offering to eligible parents means-tested financial support for the payment of school fees for as many pupils as possible who meet the College's entry criteria, as determined by the Head. Such support is known as a bursary.
- 2) Bursaries may be awarded in the form of a discount of up to half-fee remission in cases of proven need depending on the individual circumstances of the prospective pupil and each of their parents.
- 3) Bursaries are awarded in relation to educational tuition fees only; supplementary charges, such as lunch, transport, trip or examination fees, are not included.
- 4) Bursary awards are subject to an annual review of the pupil's and their parent's financial circumstances, with fresh information being required about the pupil's parents' circumstances for every year that their child attends the school.
- 5) Gross family income in excess of £75,000 is unlikely, in usual circumstances, to qualify for bursarial support for one child.
- 6) Awards may be varied for compassionate or other pertinent reasons, including but not limited to: a pupil's progress, attitude, attendance or behaviour; where the parents have failed to support the College or otherwise have not acted in accordance with their obligations under the College's Terms and Conditions, for example by the late payment of any contribution they are making to the fees; or otherwise in accordance with the terms of the award or the College's Terms and Conditions.
- 7) A bursary may be withdrawn in its entirety in accordance with the terms upon which such an award is made or otherwise in accordance with the College's Terms and Conditions. A bursary may also be withdrawn in its entirety if, in the opinion and at the discretion of the Head, the child's attendance, progress and/or behaviour (and/or the parents' behaviour or conduct (or the behaviour or conduct of one of the parents)) no longer merit the continuation of the award.
- 8) The school reserves the right to amend the way in which awards are assessed.
- 9) Any award or grant is at the complete discretion of the College and the Head's decision in all matters is final.

### **Policy Statement (2)**

- 1) This policy applies to all members of the Abbey Gate College community, including those in our Senior and Infant and Junior setting.
- 2) Abbey Gate College implements this policy through adherence to the procedures set out in the rest of this document.
- 3) This policy is made available to all interested parties in accordance with the *Provision of Information* policy. It should be read in conjunction with the *Admissions Policy*.
- 4) The College is fully committed to ensuring that the application of this policy is non-discriminatory in line with the UK Equality Act (2010). Further details are available in the College's *EDI* policy document.

- 5) This policy is reviewed at least annually, or as events or legislation changes require, by the Head, Finance Manager and the Governing Body. The deadline for the next review is no later than 12 months after the most recent review date indicated above.
- 6) The most recent updates were made in relation to bursary criteria.

### **Key Personnel**

- 1) Craig Jenkinson: Head
- 2) Andrew Grime: Chair of Governing Body
- 3) James Brown: Chair of Finance Committee
- 4) Anna Williams: Finance Manager
- 5) Sam Maclaren: Admissions Manager
- 6) Katie Simons: Executive PA

### **New Applicants**

Requests for financial support usually fall into two categories:

- 1) New applicants to the school, usually on entry to Year 3, 7 or 12, where a place has been offered but parents are unable to fund the fees and other educational expenses.
- 2) Existing pupils where a change in the pupil's and/or parents' circumstances has resulted in difficulty in meeting fees and other educational expenses and may result in the child being withdrawn part way through a stage of their education.

Within the second category there may be temporary arrangements dealing with the disbursement of "hardship" funds when local or national economic circumstances affect the income of school families.

Information provided by the school, alerting parents of prospective pupils to the possibility of gaining means-tested financial support with the payment of school fees and other educational expenses, is included in:

- The school's prospectus
- The school's website

### **The Application Process**

Bursaries may be made available to parents of new children, usually entering Year 3, 7 or 12. See the school's Admission's Policy for further information on the school's entry criteria. They are awarded at the discretion of the Head. The Head, Finance Manager, Admissions Manager and Executive PA are responsible, as applicable, for the management and coordination of the process.

The College uses an external organisation, Bursary Assessment Associates (BAA), to assist with processing bursary applications, including meeting with the parent(s). Information provided by applicants is given, in confidence, to that organisation for those specific purposes.

All personal data processed in connection with the school's arrangements for bursaries is processed in accordance with the school's Privacy Policy, which is available on the school's website and is otherwise available from the school upon request.

- 1) The Admissions Manager will respond to initial enquiries about Bursaries with a Stage 1 letter, including a link to the Bursary Policy and contact details for the Finance Manager.
- 2) The Finance Manager, having initially reviewed eligibility, will send the parent(s) details of the link to BAA's online forms. In the event that both parents are separated and/or divorced, financial information from both parents should still be provided, as should the financial information of any other adults in the same household of either of the parent. The form, which requests details of all income, savings and capital must be accompanied by full documentary evidence. The completed forms, together with the necessary documentary evidence, are to be submitted no later than the date of the entrance exam in any year for bursaries to start the following September. Both parents seeking a bursary will be required to sign a declaration stating that the information they have provided is both accurate and complete as well as requiring, in the event their application for a bursary is successful, them to update the College in the event those circumstances change during the academic year in question. If any information provided in the application, or as part of the broader assessment process, is subsequently discovered to be false or misleading or incomplete, the school may withdraw any award which has been made with immediate effect and, depending on the circumstances may require reimbursement. The College may also terminate its parent contract (Terms and Conditions) and require the removal of the child in such circumstances.
- 3) BAA will assess 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 will involve a representative of BAA meeting the parent(s) to ensure the information has been correctly interpreted and the basis of the financial assessment has been fair.
- 4) BAA will prepare a recommendation, which is considered by the Head and a decision is then reached.
- 5) Early Spring Term, the parents are advised whether their child is to be offered a place at the school and of the bursary offer.
- 6) Both parents are then required to sign a letter accepting the place at the school in accordance with stated timescales, and an acknowledgement agreeing to any additional terms and conditions relating to the bursary.

### **The Case for Assistance**

The Head will consider a number of factors when making the judgement as to the justification for support and the extent of such support; inevitably this is a holistic judgment. 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 their academic assessment results in accordance with the school's published entry

criteria. Bursary funds are limited and those judged most suitable will be given priority as those likely to gain most from the school's educational provision. Each pupil to whom support is offered must, in the opinion of the Head, be likely to make good academic progress following admission 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. Previous school reports will be consulted for evidence of the pupil's attainment, progress and behaviour.

- **Financial limitations**- the amount of the bursary award is not influenced by the child's academic ability but by the extent of need up to 50% of the full fees. Each case is assessed on its own merits and awards are made 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 could 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 (but are not limited to):
  - The ability to improve the financial position or earning power of each parent. 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.
  - 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 property assets.
  - In cases of parents who are divorced or separated, the contribution that is being made or could be made by both parents, regardless of who the child lives with, and based on the principle that liability for the fees is joint and several. This means that the school may consider the financial circumstances of each parent separately and together, treating each parent's household separately.
  - The number of school aged children in the household.
  - Contribution to household costs including school fees by other family members, any adults unrelated to the child or by third parties / outside sources.
  - Any fees which are being paid to other schools (or universities).
  - Acknowledging that others might have a different view, the school considers that the following would not be consistent with the receipt of a bursary. It should be noted that the list is not comprehensive:
    - frequent or expensive holidays;
    - new or luxury cars;
    - investment in significant home improvements;
    - a second property/land holdings;
    - failure to honour school fee payments to other schools.
- **Other factors**- it is recognised that, in addition to meeting academic requirements and financial constraints, there may be other circumstances which should be considered as part of the school's holistic judgment. These include:

- Where a child has siblings at the school (though a bursary award to one child does not guarantee an award to a sibling).
- Where the social or emotional needs of the child are relevant.
- Where a parent is critically or terminally ill or is unable to secure permanent employment due to poor health or incapacity.
- Where a separation has resulted or is likely to result in the child having to be withdrawn from the school, adding to the stress of coping with the parents separating, although the school will nonetheless consider the financial circumstances of both parents in such cases.

### **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 bursaries. This sum will be set within budgetary constraints. Parents with a child at the school whose financial circumstances suddenly change may apply for a hardship award to the Head, explaining their situation and using the BAA forms, as above. Such awards are subject to the availability of funding and cannot be guaranteed.

If parents continue to require financial support in subsequent years, they will be required to submit repeat means-testing forms in the same way as other bursary holders.

### **Annual Review**

All bursary awards are subject to repeat consideration of the child's and each parent's financial circumstances each year and may be varied depending on the outcome of any review. Current bursary holders will be issued with annual review notification at the beginning of the Spring Term each year, for return by the end of February. Bursary holders will usually be advised of the outcome of the annual review at the beginning of the Summer Term.

For those previously in receipt of bursaries, the Head has the discretion to reduce or withdraw an award not only where a pupil's progress, attitude, attendance or behaviour has been unsatisfactory but also where the parents have failed to support the school, for example by the late payment of any contribution they are making to the fees or by otherwise not acting in accordance with the school's Terms and Conditions, or otherwise in accordance with the terms of the award or the school's Terms and Conditions.

### **Confidentiality**

The school and BAA respect the confidentiality of bursary awards made to parents and recipients and prospective recipients are expected to do likewise.