

# Bedales School Bursary Policy

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For Pupils/Students		

# Bursary Policy

## General

The Governors of Bedales School (Senior, Prep and Pre-prep) 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 applied to tuition fees payable, depending on the financial, compassionate or other pertinent circumstances of applicants. Bursaries are not ordinarily available to pupils whose parents are resident outside of the UK. The Bursary Policy is regularly reviewed and adjustments made according to the Schools' charitable objects.

The school has two linked trusts. Firstly, the John Badley Foundation (JBF) which support children whose circumstances mean that they have no means with which to pay the school fees. Any children who enter the school as JBF students would be supported with 100% of the school fees. And secondly, the Bedales Grants Trust Fund which assists the school in providing funds for means tested bursary support. The application process for any bursary is the same and as described below.

Bursary awards are subject to repeat testing of parental means. Financial assessments are made for the point of entry to the school and then as relevant on moving from the Prep School to Senior School and when a pupil moves into the sixth form. Parents are required to confirm that there have or have not been any changes to their financial circumstances every year. Bursaries may be varied upwards or downwards, depending on parental 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). Further detail about this is in the paragraphs below.

## New Applicants to the School

### Awareness

Information about the availability of means-tested financial support is made available by the School on its website and in information via the Admissions office.

### The Application Process

Bursaries may be made available to parents/guardians of children entering any year-group of Bedales Schools. However, it would only be in exceptional circumstances that a bursary would be awarded to pupils below 11+ (Year 7 entry). All bursaries are awarded at the discretion of the Governors, and the Bursar is responsible for the management and coordination of the process, in liaison with the Head of Bedales Schools, the Head of Bedales Prep and the Director of Admissions.

- Step One. Parents/guardians seeking a bursary are required to complete an online application form which seeks to establish the financial circumstances of the household. The application, which requests details of income and capital, must be accompanied by full documentary evidence. The application, together with the necessary documentary evidence, must be completed by no later than 30<sup>th</sup> September (for entries into 6.1) or 31<sup>st</sup> October (for entries into all other year groups) of the year before September entry. However, for candidates being considered for a place at the Senior school at 13+ and going through the assessment process, bursary applications will need to be completed by the 31<sup>st</sup> October immediately before the assessment takes place. It should be noted that, if applicable, an offer of a bursary will be made with an offer of a place, but will be subject to confirmation prior to the student starting in Year 9.
- Step Two. The school uses Bursary Administration Limited (BAL) to carry out a detailed analysis of parental/family means to pay the fees. This process will involve a meeting with a member of the

BAL's staff team which could take place by phone or video call and a home visit by a member of BAL may be necessary.

- Step Three. The Head of Finance, prepares a recommendation which is considered by the Bursary Award Panel (Head of Bedales Schools, the Head of Bedales Prep as appropriate, the Director of Admissions and the Bursar) and a decision on the level of bursary that can be offered is then reached.
- Step Four. After completing and passing the relevant assessments for entry into the School, an offer of a place to a new pupil will be made and this will whenever possible be accompanied by a Bursary award. For students already within the Senior or Prep School, an offer of a Bursary award will be made to parents at the same time as offers being made to new pupils' parents, but it should be noted that any offer made for Year 9 will be subject to a review prior to starting in Year 9.
- Step Five. Parents/guardians are required to sign a letter accepting the place at the School and an acknowledgement agreeing to the particular conditions relating to the bursary. The completion of the acceptance form and payment of deposit forms the parent/school contract. Parents agree to pay the balance of fees and extras by Direct Debit.

### The Case for Assistance

The Bursary Award Panel 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 results of each applicant, but academic potential and potential in extra-curricular areas 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 of Bedales Schools, be likely to make sound 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. Each applicant will need to meet the Schools' normal academic requirements. Previous school reports will be consulted for evidence of good behaviour.
- 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 financial 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 are made based upon means to pay the fees and so, as well as current earnings, other factors that 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 parents or partners with formal custody, 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 that could be released from houses or property. Equity can be and is expected to be released to help with the cost of school fees.
  - In cases of separation, the contribution made by the absent parent.

- o Contribution to household costs by other, wider, family members, any adults unrelated to the child or by outside sources.
- o Where fees are being paid to other schools (or universities) the School's award, if made, will take into account these outgoings, but where fees are being paid to another school the parents will be expected to have applied for bursary assistance at that school for their other child(ren).
- o 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 or additional property/land holdings.
  - Significant Investment plans.
- 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:
  - o Whether the social needs of the child are relevant (eg: may be suffering from bullying at their present school).
  - o Whether a parent/guardian is terminally ill or is unable to secure permanent employment due to poor health or if the family suffers a bereavement.
  - o Whether 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.
  - o Whether a child has siblings at the School.

### **Existing Pupils – Change in Family Circumstances**

We recognise that family circumstances can change and this can result in sudden or unforeseen need for assistance. Parents/guardians with a child at the School whose financial circumstances suddenly change may apply for a bursary to the Head of Bedales Schools, explaining their situation, but this would only be after a meeting between the Bursar and the parents to ascertain how the school may be able to help. Very often changes in circumstances result in a temporary problem rather than an enduring one requiring a bursary. If there is still a need for a bursary, then this would be subject to the availability of funding, particularly in the current year, and cannot be guaranteed.

### **Annual Review**

All bursary awards are subject to confirmation of parental means each year and may be varied upwards or downwards depending on parental circumstances. Current bursary holders will be asked to confirm in writing that there has not been any material change to their financial circumstances at the beginning of September each year, for return by the end of the month. For those previously in receipt of bursaries, the Head of Bedales Schools and Bursar, 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 school fees.

## Formal Review

A formal review of every bursary will take place when a pupil moves from the Prep to Senior School and when a pupil moves into the sixth form. Parents of these pupils will be required to reapply for a bursary and a financial means testing will occur, which may involve another home visit.

## Confidentiality

The School respects the confidentiality of bursary awards made to families and recipients are expected to do likewise. Parents' personal data has to be processed during a bursary application process and shared with Bursary Administration Limited; the relevant privacy notices can be found on the School's website.

## 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. Bedales School 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 from:

Educational Trusts' Forum / Educational Grants Advice  
Website: [www.educational-grants.org](http://www.educational-grants.org)

The School Fees Charitable Trust  
37 Swan Street  
Kingslere  
Newbury  
Berkshire  
RG20 5PR  
Tel: 01306746309  
Website: [www.schoolfeescharitabletrust.co.uk](http://www.schoolfeescharitabletrust.co.uk)

Royal National Children's Springboard Foundation  
7 Grosvenor Gardens  
Westminster  
London  
SW1W 0BD  
Tel: 020 3405 3630  
Website: [www.royalspringboard.org.uk](http://www.royalspringboard.org.uk)

Buttle UK  
15 Greycoat Place  
London  
Westminster  
London  
SW1P 1SB  
Tel: 020 7828 7311  
Website: [www.buttleuk.org](http://www.buttleuk.org)

Thornton-Smith Plevins Trust  
BDO LLP  
2 Blagrove Street  
Reading  
Berkshire  
RG1 1AZ  
Tel: 01182147100

Wispers Trust  
POX Box 119  
GU29 2BH  
Website: [wiperstrust.org.uk](http://wiperstrust.org.uk)  
Email: [wisperstrust@btconnect.com](mailto:wisperstrust@btconnect.com)