



## MEANS TESTED BURSARY POLICY AND GUIDANCE

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### 1. Purpose of the Bursary Scheme

- 1.1 The Governors of Cophthorne Prep School (the School) are committed to broadening access to the School by offering means-tested financial support with the payment of school fees to eligible parents/guardians. Such support is known as a 'bursary' and bursaries may be awarded in the form of a discount of up to 100% on tuition fees payable, depending on the financial, compassionate or other pertinent circumstances of applicants.
- 1.2 Bursary awards are subject to repeat testing of parental means each year and may be varied upwards or downwards, depending on parental circumstances. Awards are made on the basis of individual parents'/guardians' 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), compassionate or other pertinent considerations.
- 1.3 The School is committed to equal treatment for all its pupils and parents. As a result, applications are welcomed from all parts of the community irrespective of gender, race, ethnicity, religion, sexual orientation, age, disability or social background.

### 2. Types of bursary

- 2.1 Requests for financial support usually fall into two categories, Entrance and Hardship:

#### ***Entrance Bursary***

- 2.2 An Entrance Bursary is for new applicants to the School where a place has been offered but parents/guardians are unable to fund the tuition fees. Bursaries can be awarded to applicants entering the school in any year group.
- 2.3 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

#### ***Hardship Bursary***

- 2.4 A Hardship Bursary is for 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parents'/guardians' circumstances has resulted in difficulty in meeting tuition fees and may result in the child being withdrawn part way through a stage of education. Hardship Bursaries are usually given to those families who are in severe financial difficulties due to a change in circumstances that is beyond the control of both parents, such as a death in the family or redundancy. Hardship bursaries are normally for a Term or for the remainder of the academic year and are unlikely to continue indefinitely.



### 3. Number of bursaries

- 3.1 There is no set number of bursary awards that may be made each year. The limit will be determined by the funds available.
- 3.2 Within overall budget funding, the School will in normal circumstances set aside each year an amount available for bursaries within a designated bursary fund. This fund covers both Entrance Bursaries and Hardship Bursaries, 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.

### 4. Eligibility for a bursary

- 4.1 Bursaries are awarded at the discretion of the Headmaster and Bursar, who 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.

#### *Entrance Bursary*

- 4.2 For new applicants, the School will follow the normal assessment procedure for entry and the bursary process will only begin once a place has been offered to the child. Bursary funds are limited and it is unlikely that a family with a significant gross income, a substantial family home or second property, and/or significant other assets, would qualify for a bursary. 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 Headmaster, 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.

#### *Hardship Bursary*

- 4.3 Parents/guardians with a child at the School whose financial circumstances suddenly and significantly change may apply for a bursary to the Bursar, explaining their situation. Such awards are subject to the availability of funding and cannot be guaranteed.

### 5. Financial information

- 5.1 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 appropriately 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 parents 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 his or her 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 together with the terms of any financial settlement/agreement between the parents.
- 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 grant will consider all these outgoings.

5.2 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.

## 6. Other factors

6.1 It is recognised that, in addition to 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 (e.g.: 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.

## 7. Application process

### **Step 1**

7.1 Parents who wish to apply for a bursary will be asked to complete a 'Confidential Statement of Financial Circumstances' form. The form is confidential and requires full information about the family's financial circumstances, with supporting documentation. The school uses an independent company, Bursary Administration Ltd (BAL), to review and assess bursary applications. Shortly after receipt of the application form, BAL will arrange either a home visit or a phone/Zoom call to talk through the financial circumstances form and discuss the application. Home visits are undertaken at the applicant's home in a sensitive manner and all information is treated in the strictest confidence. The application and the BAL feedback will be submitted to the Bursar.

7.2 For Entrance Bursaries, the completed forms together with the necessary documentary evidence, are to be submitted to the Bursar no later than the end of February of the year in which the bursary is due to start in the September.

7.3 Applications for Hardship Bursaries may be made at any time.

### **Step 2**

7.4 The Bursar prepares a recommendation, which is considered by the Headmaster and a joint decision by the both the Headmaster and the Bursar is then reached.

### **Step 3**

7.5 The parents/guardians are advised whether their child is to be offered a bursary no later than one month after the application for a bursary was submitted, unless the application is made just before a school holiday.



#### **Step 4**

7.6 In the case of an Entrance Bursary, the parents/guardians are then required to sign a letter accepting the place at the School. All parents/guardians are required to sign an acknowledgement agreeing to any conditions relating to the bursary.

#### **8. Annual review**

8.1 Entrance Bursary award is subject to repeat testing of parental means each year and may be varied upwards or downwards depending on parental circumstances.

8.2 Entrance Bursary holders will be issued with repeat means-testing forms at the beginning of February each year for return by the end of the month. However, it is the responsibility of the parents, who find their financial circumstances have changed substantially for the better, to inform the Bursar of this situation immediately and undertake a formal review at that time. For those previously in receipt of bursaries, the Headmaster and Bursar have the discretion to reduce or withdraw an award with immediate effect, 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.

8.3 Hardship Bursaries will normally be made from the start of the Term following receipt of the bursary application, for either a Term or for the remainder of the academic year, depending on the circumstances. The bursary will then usually be reviewed each Term, but is unlikely to continue indefinitely.

#### **9. Confidentiality**

9.1 The School respects the confidentiality of bursary awards made to families, and recipients are expected to do likewise. Such awards should not be discussed with other parents. Please see the Privacy Notice on the School website.

#### **10. Other sources of bursary assistance**

10.1 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. The School encourages parents/guardians to apply for this type of support where it is felt a good case can be made for assistance.

This policy will be reviewed annually by the Bursar.