



## **BURSARY POLICY**

### **MEANS TESTED BURSARIES**

*Rooted in Christ and Catholic tradition and under the guidance of its patron, St Edmund's aims to realise the God-given potential, in body, mind and spirit, of all members of its community through service and leadership.*

*Avita Pro Fide*

*St Edmund's is committed to ensuring the welfare and protection of children in their care and this commitment is a fundamental part of the role of every employee.*

#### **Introduction**

This policy has been authorised by the Governing Body of St Edmund's College. Its status is advisory only. It is addressed to parents of students and prospective students and to all members of the teaching and administration staff.

This policy contains an overview of the bursary scheme currently in operation at the College. The policy, together with all ancillary documentation including a Confidential Statement of Financial Circumstances questionnaire, is made available to all parents and prospective parents on request.

The Governors of St Edmund's College are committed to broadening access to the College by offering to eligible parents/guardians means-tested financial support with the payment of school fees. Such support, known as a bursary, may be awarded in the form of a discount of up to 100% of tuition fees payable, depending on the financial, compassionate or other pertinent circumstances of applicants.

The College is a registered charity that is committed to providing significant public benefit. The College is aware of its obligations under the Charities Act 2006 and seeks to adhere to the public benefit principles identified by the Charity Commission. This policy is reviewed regularly to take into consideration the latest guidance from the Charity Commission and any other factors relevant to this policy.

The College's bursary scheme is designed to assist parents or prospective parents on low incomes who for financial reasons might otherwise be unable to send their child to the College. Awards are subject to annual testing of parental means and may be varied upwards or downwards depending on parental circumstances. Awards are made on the basis of a family's financial 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.

The value of individual bursaries ranges from 5% of tuition fees to full-fee bursaries, although the College would normally expect parents to make some contribution towards fees. All bursaries are fully means-tested and are assessed on a sliding scale depending on the parents' combined annual income, net assets and any other relevant information.

Requests for financial support usually fall into two categories:

Prospective pupils to the College whose families would otherwise be unable to consider the College due to their financial circumstances; and

- Emergency bursaries, in a form of temporary assistance for existing pupils where a sudden unforeseen change in parents'/guardians' circumstances has resulted in difficulty in meeting tuition fees and may result in the child being withdrawn partway through a



final key stage year of education. In such circumstances any award would normally only be available until the end of that Key Stage.

The College does not currently benefit from endowment trust funds to support bursaries and as such, funding is limited. Owing to the limited financial resources of the College to fund bursaries, **not every eligible application for a bursary will be successful.**

The College has a duty to both benefactors and to the wider community of fee-paying parents to ensure that the limited funds available are awarded to the most deserving cases. In addition to the likely contribution of the pupil to the life of the College or Prep School, other factors to be considered might include:

- current and projected income and expenditure;
- the earning power of the family. For example, both parents would normally be expected to be employed, unless there is incapacity or a need to care for children under school age or other family dependents;
- the possibility of capital or equity release from savings, investments or housing;
- in cases where parents are separated, the contribution an absent parent could be expected to make;
- the possible contribution of other family members or outside sources;
- the priorities of the parents. The College would see the payment of school fees as of higher priority than, for example, frequent or costly holidays, expensive cars or second homes.

Parents wishing to apply for a bursary should contact the Accounts Department at [accounts@stedmundscollege.org](mailto:accounts@stedmundscollege.org) and request an application form.

### **Confidentiality**

The College will always respect the confidentiality of bursary awards made to families and we expect the same of recipients. Students will not be made aware that they benefit from a bursary unless informed by their parents.

### **The Application Process - General**

All bursaries are means-tested, and there are no exceptions to this. Bursaries will be awarded at the sole discretion of the Awards Committee, whose decision will be final. In addition to means-testing the Awards Committee will take into account any other relevant circumstances and consider the likely contribution of the pupil to the St Edmund's community.

All applicants for a bursary are required to complete a confidential statement of financial circumstances questionnaire and provide any supplemental information as requested. It is critical that Parents/Guardians answer all the questions carefully and in full and any incomplete applications will be returned. The questionnaire is designed to provide a full picture of the income and assets of applicants so that the awards committee can determine those to whom an offer of a bursary would be most beneficial.

Bursaries awarded at the Prep School or College will be valid for the duration of the pupil's time at the Prep School or the College and will be subject to an annual means test review. Nevertheless, should any of the information disclosed in response to the questionnaire become inaccurate at a later date, the College must be informed without delay. Failure to disclose requested information or a change in circumstances to the College could lead to a bursary being withdrawn or withheld and repayment of amounts awarded.

Please note that families who may be classified as "low income" but have substantial assets may be ineligible to receive a bursary.

Each Bursary offer will reflect the particular circumstances of the recipient and will be expressed as a percentage remission of tuition and/or boarding fees.



### **The Application Process at 11+**

Bursaries may be made available to parents/guardians of children entering St Edmund's College at 11+ (see the College's admissions policy). Bursary awards will be entirely at the discretion of the Awards Committee and awards will be given to those pupils who are deemed to be in the greatest financial need and who have the greatest potential to benefit from, and contribute to, the full range of College activities.

Step One. Parents/guardians requesting a bursary are required to complete a Confidential Statement of Financial Circumstances form which seeks to establish the financial circumstances of the household. The form, which requests detail of income and capital, may be found in Appendix 1 and must be accompanied by full documentary evidence. The completed form, together with the necessary documentary evidence, is to be submitted to the Bursar no later than 30<sup>th</sup> November in the year preceding entry to the College. Applications and supporting paperwork received after that date may not be considered. This form is intended to establish whether the household has sufficient means to pay all, some or none of the required College fees. Failure to include supporting documentation will automatically result in no offer of assistance due to our inability to complete the assessment.

Step Two. The Bursar's Office will collate all of the information about an application and prepare an initial recommendation for consideration by the Awards Committee. The application is discussed in full by the Committee and a final decision is reached.

Step Three. Following the entrance examination, the parents/guardians are advised whether their child is to be offered a place at the College and of the bursary offer, if any.

Step Four. Parents/guardians are then required to sign an acceptance form accepting the place at the College and a separate form confirming acceptance of the terms and conditions of the bursary award. (see Appendix 2)

### **The Application Process at 16+**

A limited number of bursaries may be made available to parents/guardians of children entering St Edmund's College at 16+ (see the College's admissions policy). They are awarded at the discretion of the Awards Committee.

Step One. Parents/guardians seeking a bursary are required to complete a Confidential Statement of Financial Circumstances form which seeks to establish the financial circumstances of the household. The form, which requests detail of income and capital, may be found in Appendix 1 and must be accompanied by full documentary evidence. The completed form, together with the necessary documentary evidence, is to be submitted to the Bursar no later than 31<sup>st</sup> January in the academic year preceding entry to the College the following September. Applications and supporting paperwork received after that date may not be considered. This form is intended to establish whether the household has sufficient means to pay all, some or none of the required school fees. Failure to include supporting documentation will automatically result in no offer of assistance due to our inability to complete the assessment.

Step Two. The Bursar's Office will collate all of the information about an application and prepare an initial recommendation for consideration by the Awards Committee. The application is discussed in full by the Committee and a final decision is reached.

Step Three. The parents/guardians are advised whether their child is to be offered a place at the College (subject to GCSE results) after the child has been interviewed and a reference received from their current school. If a bursary award is to be granted, the parents/guardians will be advised of the amount at the same time as the offer of a place.



**Step Four.** Parents/guardians are then required to sign an acceptance form accepting the place at the College and a separate form confirming acceptance of the terms and conditions of the bursary award (see Appendix 2)

### **The Case for Assistance**

Having established the financial need, the Awards Committee allocates the available bursary funds. The Committee will make awards that enable children to attend the College, rather than simply dividing limited funds between all applicants and expecting parents to fund the shortfall. The Awards committee 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 College is the first consideration in granting support.

**Suitability.** In assessing a child's ability, attention will be given to the academic assessment results of each applicant; potential will also be considered as well as actual achievement. As bursary funds are limited those judged most likely to gain from the educational provision will be given priority. Each student considered must, in the opinion of the Head, be likely to make sound academic progress following admission and possess the potential to benefit from participation in the wider, extracurricular activities on offer at the College. In normal circumstances, each applicant should meet the College's normal academic requirements. Previous school reports will be considered for evidence of good behaviour and achievement.

**Religious belief.** Priority will be given to practising Roman Catholics.

**Financial limitations.** The amount of the bursary 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 subject to the College'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 College has a duty to ensure that all bursary awards are awarded appropriately 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 adult related to the child or by outside sources.
- Where fees are being paid to other schools (or universities) the College's grants will take into account all these outgoings.
- Acknowledging that others might have a different view, the College considers that inter alia 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/landholdings.
  - Higher than average non-contractual pension contributions
  - Significant equity in the main family residence or ability to downsize
  - Outstanding school fees payable to other educational establishments



The award of a bursary for one child does not necessarily guarantee awards to siblings already in the College or subsequently admitted to the College.

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 College;
- Where the social needs of the child are relevant;
- Where a parent/guardian is terminally ill or, because of poor health, is unable to secure permanent employment.

**Existing Students - Change in Family Circumstances**

Within overall budget funding, the College will in normal circumstances set aside each year a hardship fund, for cases of sudden, unforeseen need (such as those arising from illness or bereavement) or where applications meriting bursary assistance are received out of the normal cycle of bursary submission, scrutiny and award. This sum will be set within budgetary constraints. Parents/guardians with a child at the College whose financial circumstances suddenly change may apply for a bursary to the Bursar explaining the situation and using the form at Appendix 1. Applications for Hardship/ Emergency Bursaries will be considered by the Bursary Committee as soon as possible after the application has been received. The Awards Committee will be sympathetic to changes in family circumstances but any application submitted for these reasons is means-tested in the same way as any other award. Parents/guardians should be aware that such awards are subject to the availability of funding and cannot be guaranteed.

Expectations of all Award Holders

- 1) Award holders are expected to show commitment to the College or Prep School
- 2) Award holders are expected to set a lead among their peer group in relation to behaviour, leadership and attitude
- 3) Award holders are expected to achieve consistently strong grades for effort across the entire range of subjects, as well as high levels of achievement (as appropriate to the individual)
- 4) Award holders are expected to promote their particular area(s) of expertise among their peer group
- 5) In return, the College provides opportunities for award holders to maximise their potential and to develop their skills and expertise to the best of their ability

**Annual Review**

All bursary awards are reviewed at least annually, and all Parents/Guardians are required to submit new, up-to-date financial information to support their annual applications, based on which the award may be increased, reduced or withdrawn at the discretion of the Awards Committee. Parents/Guardians are also required to inform the College immediately of any change in their financial circumstances while a bursary is being provided. Failure to divulge requested information or a change in circumstances to the College could lead to a bursary being withdrawn or withheld or a request for repayment made. Current bursary holders will be issued with a repeat means testing forms in October each year to return by the end of December. These will be reviewed by the Awards Committee each year during the Lent Term, for the following academic year. For those in receipt of Bursaries, the Awards Committee can reduce or withdraw an award not only as a result of an improvement in financial circumstances but also where pupils progress, attitude and behaviour has been unsatisfactory or where the parents/guardians have failed to support the College, for example by the late payment of any contribution they make to the fees. For the avoidance of doubt parents failing to pay the termly net fees, after deduction of the advised and agreed bursary, on time in accordance with the College's terms and conditions may have their advised and agreed bursary withdrawn.



**Other Sources of Bursary Assistance**

In addition to the College's bursary funds, 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 fee-paying schools and due to a change of circumstances may be unable to remain. St Edmund's College 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: <https://educational-grants.org/>

**Data Protection**

The College processes all personal data (which includes the information supplied to the College as part of the Bursary eligibility process) in accordance with data protection law. Please see the College's Privacy Policy on the College's website for more information about how the College processes personal data about individuals.

**Conditions of Award**

The Conditions of Award take precedence over any of the elements of the College's Parent Contract which are inconsistent with them but in all other respects the College's Parent Contract as amended from time to time shall apply and these Conditions of Award shall be interpreted in accordance with it.

Owner of policy:	Bursar		
Reviewed by:	Headmaster		
Frequency of review:	Every 3 Years		
Policy last reviewed:	Trinity	2021	
Next review date:	Trinity	2024	
Sub-Committee reviewed at:	Academic & Finance Sub-Committee		