



## **BEAUDESERT PARK SCHOOL**

### **BURSARY POLICY**

#### 1. INTRODUCTION

- 1.1 In keeping with the charitable aims of the School, Beaudesert Park School ("the School") already offers a number of means-tested bursaries to children from lower income families, and whose parents would not otherwise be able to afford a Beaudesert education.
- 1.2 The Governors and the School wish to provide greater numbers of high-level bursaries (for instance 80% to 100% of tuition fees) for pupils from lower income families. For those children in receipt of a bursary, financial support may also be provided to assist with additional school activities.
- 1.3 The School also works with appropriate senior schools to help secure ongoing financial support, beyond Year 8, where needed.
- 1.4 Bursaries are funded from the Bursary Fund which is reliant on donations and therefore the ability to fund bursaries is dependent upon the level of the Bursary Fund at the time.
- 1.5 Save in exceptional circumstances, Bursaries are only be awarded to pupils in Year 4 and above.
- 1.6 All applications for bursaries are means tested, including by an external company, and considered by the School's Governance & Compliance Committee, who decide whether a bursary should be awarded. An appeal of the Governance & Compliance Committee's final decision can be made to the Chair of the Governors
- 1.7 Where a bursary is awarded, it will be reviewed annually, or more frequently if appropriate, by reference to the applicant's financial circumstances.
- 1.8 Applications for bursaries will be treated equally irrespective of the applicant and child's race, religion, national or social origin, culture, gender or academic ability in accordance with the Admissions Policy.
- 1.9 The application for and award of a bursary is a confidential process and any personal data provided is processed in compliance with the Principles of the Data Protection Act 1998.
- 1.10 References to "parents" in this policy include guardians who are legally

responsible for the child concerned.

- 1.11 The School website informs applicants that a copy of the bursary policy (as reviewed and updated periodically) is available on request from the School office.

## 2. TYPES OF BURSARY

- 2.1 Bursaries may be awarded to pupils entering the School for the first time, or to existing pupils whose family experience unforeseen financial hardship, such that they are unable to continue to pay the School's fees, without financial assistance.
- 2.2 In each case the application for a bursary depends on the financial circumstances of the family and requires the completion of the Bursary Application Form and where appropriate investigation by Bursary Administration Ltd (or a similar third party company), who will conduct means testing.
- 2.3 Bursaries are awarded and reviewed on an annual basis (or more frequently at the discretion of the Bursar), including by the completion of a declaration as to any material changes to the applicant's financial circumstances.

## 3. APPLICATION PROCESS

- 3.1 Bursary Application Forms can be obtained from the School office and must be submitted by the end of December each year, for admissions the following September.
- 3.2 Assessment for a Bursary involves consideration of who would benefit most from a place at the School and would be informed by a report from the child's current school.
- 3.3 Decisions regarding bursary awards are, in the case of new entrants, considered by the School's Governance & Compliance Committee and communicated by the Finance Director, by the end of the Spring term.
- 3.4 Applications in respect of existing pupils, who have experienced a material change in the family's financial circumstances, may be submitted to the Finance Director at any time and will be considered by the School's Governance & Compliance Committee.
- 3.5 Bursary Application Forms requires the applicant to provide outline details of the family income, their capital assets and regular commitments, such as mortgage payments. Details of other dependent children in the family are required and information about their current status e.g. whether they are attending school or place of further education, or in work. This is in order to make a fair assessment the family's financial circumstances.
- 3.6 The completed Bursary Application Form is considered by the Finance Director. Where the Finance Director considers that the completed Bursary Application Form shows there is no financial need, no bursary will be granted.

- 3.7 Where the Finance Director considers that there may be grounds for a bursary, the School will then appoint Bursary Administration Ltd (or a similar third party company) to investigate the Applicant's financial circumstances further.
- 3.8 In preparing their report Bursary Administration Ltd will undertake financial checks and a home visit during which the applicant's financial circumstances will be discussed in detail. This will require disclosure of all:
- 3.8.1 Income: including PAYE or self-employed income, dividends, rents received, pensions received, investment income, benefits, maintenance received, family support or other income;
  - 3.8.2 Expenses and outgoings: including taxes and insurances, property expenses, household expenses, vehicle expenses, education expenses, maintenance payable, holiday and leisure activities, loan repayment and other expenses;
  - 3.8.3 Assets: including the family home and other UK and foreign property, investments, pensions, value of business, settlements and inheritances due and cash at the bank; and
  - 3.8.4 Liabilities: including mortgages, other loans and credit cards and arrears and other debts.
- 3.9 Based on such financial information Bursary Administration Ltd will then submit a report, including their conclusion on the merits of the application, for consideration by the School's Governance & Compliance Committee.

#### 4. APPROVAL PROCESS

- 4.1 Bursary applications will be considered by the School's Governance & Compliance Committee, in consultation with the Finance Director and Headmaster, following receipt of the report from Bursary Administration Ltd, together with the completed Bursary Application Form.
- 4.2 The level of any award will be agreed by the Governance & Compliance Committee and a formal offer or rejection will be communicated by the Finance Director to the applicant, in writing.
- 4.3 The award or otherwise of a bursary and the level of any bursary awarded is a matter of discretion, to be exercised reasonably by the Governance & Compliance Committee and with regard to the funds currently and prospectively available from the School's Bursary Fund.
- 4.4 Where there is competition for the award of a bursary, but there are limited funds (or the prospect of limited funds) available from the Bursary Fund, the Headmaster will make recommendations to the Governance & Compliance Committee as to (1) which child(ren) he considers would benefit most from a place at the School and (2) which child(ren)'s admission would most benefit the School.

## 5. APPEALS

- 5.1 Where a bursary is not awarded, the Governance & Compliance Committee will consider representations from the applicant, including by reference to further financial information provided. Any such representations shall be made within one month of the Governance & Compliance Committee's initial decision.
- 5.2 Where, following consideration of such representations and/or financial information, the Governance & Compliance Committee remains of the view that a bursary should not be awarded and the applicant so wishes, an appeal against the final decision of the Governance & Compliance Committee can be made to the Chair of the Governors.
- 5.3 Such an appeal must be made to the Chair of the Governors, in writing, within one month of the final decision of the Governance & Compliance Committee. Although the Chair of the Governors attends the meetings of the Governance & Compliance Committee, he/she will have played no part in the initial decision-making on whether to award a bursary.

## 6. CONFIDENTIALITY AND DATA PROTECTION:

- 6.1 All bursary applications are treated in confidence by the School and should be also treated as such by the applicant.
- 6.2 All information and personal data provided by the applicant will be is processed in compliance with the Principles of the Data Protection Act 1998 and Bursary Administration Ltd's data protection procedures.
- 6.3 Any such personal data will be used by the School for the purpose of assessing the need for a bursary only and not for any other purpose.

## 7. THE BURSARY FUND

- 7.1 Bursaries are funded from the Bursary Fund which is administered by the Finance Director and is funded by donations including from past and current parents and by former pupils.
- 7.2 The ability to award bursaries is therefore dependant on the level of the Bursary Fund at the time.

## 8. REVIEW OF THE BURSARY POLICY

- 8.1 This Bursary Policy will be monitored and reviewed periodically by the School's Governance & Compliance Committee, as required.

**Authorised by**

M Campbell

**Chair of Governance & Compliance  
Committee**

**Date** 6<sup>th</sup> February 2018

**Approved by**

M Pyper

**Chair of Governors**

**Date** 6<sup>th</sup> February 2018

**Last Reviewed**

n/a new policy

**Next Review**

November 2018