



Bursary Policy – Whole School

Version Number:	V 1.1
Applies to:	Whole School
Author (s):	Director of Finance
Review Frequency:	2 yearly
Policy category (1, 2, 3, 4):	2
Last reviewed:	Trinity Term 2024
Next review due by:	Trinity Term 2025
Approved on (date):	20 June 2023 (updated 14 August 2024)
Committee (s) Responsible:	Finance, Audit and Resources Committee
References (including legal and others eg ISBA).	ISBA
ISI Reg:	N/A
Other related policies and documents:	Privacy Policy

Contents

1. General	(2)
2. Categories of Financial Support	(2)
3. Criteria for Awards	(2)
4. The Application Process.....	(3)
5. The Case for Assistance.....	(5)
6. Annual Review	(7)
7. Confidentiality and Data Processing	(7)
8. Other Sources of Bursary Assistance	(7)
9. Compliance and Monitoring arrangements	(8)

I. General

1.1 The Governors are committed to maintaining the breadth of access to Woodbridge School by offering to eligible parents/guardians means-tested financial support for the payment of school fees. Any award is dependent upon academic performance and financial need. Such support is known as a Bursary which is awarded in the form of a discount. A reduction of the tuition fees payable can be awarded of up to 100% depending on the financial, compassionate or other pertinent circumstances of applicants. In a few rare cases an amount may also be awarded to cover 100% of the tuition fees, extras and uniform.

1.2 Bursaries are normally available to pupils joining Years 7, 9 and 12 at the Senior School.

2. Categories of financial support

2.1 The categories of bursaries available are as follows:

- **Marryott Bursaries** – means tested support for applicants to the school at Years 7, 9 and 12 whose families would otherwise be unable to consider the school due to financial circumstances. This may also be awarded as a top up bursary where a scholarship is awarded.
- **Richard B Ward STEM bursaries** – means tested support for applicants at Year 12 studying STEM subjects at sixth form, whose families would otherwise be unable to consider the school due to financial circumstances.
- **Hardship bursaries** - for existing pupils where an unforeseen change in parents' circumstances has resulted in difficulty in meeting tuition fees and may result in the child being withdrawn at key points in their education.

2.2 The demand for bursaries is high and not all applications can be funded. The criteria for making awards are detailed below.

3. Criteria for awards

3.1 Bursary awards are subject to an annual review of parents' (and where applicable their partners where the parents are separated or divorced) financial circumstances, with fresh information being required about the parents' financial circumstances for every year that their child attends the school. Bursary awards may be removed or varied upwards or downwards, depending on the parents' financial circumstances.

- 3.2 Awards are made on the basis of the confidential scale of awards which sets out award levels in relation to a family's or household's financial circumstances, as amended from time to time. The scale of awards is reviewed and revised to reflect any changes in fee costs. Though awards are generally tied to this scale, they may be varied upwards or downwards depending on individual parents'/guardians' circumstances (e.g. their savings, investments, and realisable assets, as well as their income, family size, dependants and similar factors).
- 3.3 Awards may also be varied upwards or downwards 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 school or otherwise have not acted in accordance with their obligations under the school'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 school's Terms and Conditions.
- 3.4 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 school's Terms and Conditions. A bursary may also be withdrawn in its entirety if, in the opinion 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.
- 3.5 Bursary awards are normally available for pupils entering Years 7, 9 and 12. Those awarded in Year 7 or 9 are initially awarded to the end of Year 11 (subject to point 6.1). A Bursary award is subject to the pupil achieving benchmarks of progress agreed between the family and the School. These are also reviewed annually. Those pupils who hold a bursary in Year 11 will be expected to achieve the required standard to enter the Sixth Form and any additional benchmark set at the previous annual review to maintain their bursary award. Although the process is not automatic if the agreed standard is met, it is usual that the award will continue.
- 3.6 The school reserves the right to amend the way in which awards are assessed.
- 3.7 Requests for financial support usually fall into two categories:
- New applicants to the School, where a place has been offered but parents/guardians are unable to fund the tuition fees.
 - 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 at key points in their education.
- 3.8 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.

4. The Application Process

- 4.1 Bursaries may be made available to parents/guardians of children entering Years 7, 9 and 12 of Woodbridge School, as well as other Year Groups in exceptional circumstances. They are awarded at the discretion of the Governors. The decision of the School is final

and not subject to appeal. The Head and Director of Finance are responsible for the management and co-ordination of the process. The School has engaged Bursary Assessment Associates to undertake the assessment process, which includes making home visits.

- Step One both parents/guardian(s) seeking a bursary are required to complete an application form which seeks to establish the financial circumstances of the household. In the case of separated or divorced parents each must complete a form, including any partner the parent lives within the same household. The form, which requests details of income and capital must be accompanied by full documentary evidence. The completed form, together with the necessary documentary evidence, is to be submitted to Bursary Assessment Associates in accordance with the deadlines published on the School's website. Late applications may be considered if there is a good reason (e.g. families moving unexpectedly into the area). Failure to return completed forms sent out in good time by the deadline will not be deemed as a good reason for a late application.
- 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 school 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 school may also terminate its parent contract (Terms and Conditions) and require the removal of the child in such circumstances.
- Step Two all applications are assessed in order to establish the likely level of support which will be required in order to allow the child to attend the School. This may involve a representative from Bursary Assessment Associates visiting the parents'/guardians' home, to ensure the information has been correctly interpreted and the basis of the financial assessment has been fair.
- Step Three – the Director of Finance prepares a recommendation in accordance with the school's confidential scale of awards which is considered with the Head and a decision is then reached.
- Step Four the parents/guardians are advised whether their child is to be offered a place at the School and of any bursary offer with associated school-based performance benchmarks. For the sake of clarity a place may be offered but not accompanied by the offer of a bursary. This may be as a result of the financial calculations concerning the parents' or guardians' ability to pay or that the child has not achieved the required academic standard to merit the award of a bursary. In some cases the application for a bursary may be placed on a waiting list in the event that those who have been offered a bursary do not accept their place.
- Step Five – both parents/guardians are then required to sign the acceptance forms, accepting the place at the School and agreeing to any conditions relating to the

bursary, by the stated deadline. The offer of a bursary will lapse if such acceptance has not been received by that deadline.

4.2 In advance of the beginning of the academic year all parents/guardians in receipt of a bursary are required to complete the annual renewal form return and may receive a home visit. Although for new entrants this may seem like a repeat of the process in step one above, this is a requirement. If parents'/guardians' circumstances have changed this may be reflected in a change to the amount of the award. Failure to complete and submit this form by the stated deadline will result in the withdrawal of the bursary.

4.3 Woodbridge School may use an external organisation to assist with processing bursary applications, including making home visits. Information provided by applicants may be made available, in confidence, to that organisation for those purposes.

4.4 All personal data processed in connection with the school's arrangements for bursaries shall be 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.

5. The Case for Assistance

5.1 The Head and Director of Finance will consider a number of factors when making the judgement as to the justification for support, and the extent of such support: however, applicants need to meet the financial criteria below in order to be considered for an award. The final decision lies with the Head as to whether to award a bursary, and the amount.

Financial criteria

5.2 The amount of the bursary award is influenced 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.

5.3 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 bursaries are well focussed and to do this the factors which will be considered in determining the necessary level of award will include:

- i. Annual income of the family from all sources.
- ii. 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 dependants.
- iii. 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 including the family home.
- iv. 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.

- v. Contribution to household costs or school fees from other, wider, family members, any adults unrelated to the child, or from outside sources such as trusts.
- vi. Any fees which are being paid to other schools (or universities).

5.4 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 and/or expensive leisure activities, including holidays.
- New or luxury cars.
- Investment in significant home improvements.
- A second property/land holdings/investment portfolio.
- High discretionary expenditure.

Selection criteria

5.5 Bursary awards are highly competitive and as such not all eligible pupils will be awarded a bursary. If the financial criteria above have been met following the financial assessment process, then those pupils judged most suitable will be given priority as those likely to gain most from the educational provision, in accordance with the following criteria:

- Excellent performance in the appropriate entrance examination.
- Potential to benefit from the key strengths of the School in music; sport; drama.
- Need to benefit from the School's exceptional pastoral care.
- Potential to contribute positively to the school community

Other factors

5.6 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 School (though a bursary award to one child does not guarantee an award to a sibling).
- 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 or incapacity.
- 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, although the school with nonetheless consider the financial circumstances of both parents in such cases.

Existing pupils – change in family circumstances

5.7 Within overall budget funding, the School will in normal circumstances set aside each year a hardship fund, 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 at key points in their education. These can be applied for outside of the normal calendar

cycle for bursary submission, scrutiny and award. This sum will be set within budgetary constraints. Parents/guardians with a child at the School whose financial circumstances suddenly change may apply for a bursary, explaining their situation and completing an application form. Such awards are subject to the availability of funding and cannot be guaranteed.

6. Annual Review

- 6.1 All bursary awards are subject to an annual assessment of parents' financial circumstances and may be varied upwards or downwards depending on the outcome of the assessment. Current bursary holders will be issued with a renewal form and may receive a home visit.
- 6.2 The School has the discretion to recommend the reduction or withdrawal of a bursary not only where financial circumstances have improved but also where following a review a pupil's progress, attitude or behaviour has been unsatisfactory or 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.
- 6.3 Failure to complete the forms for the annual renewal by the stated deadline may result in the bursary being withdrawn.

7. Confidentiality and Data Processing

- 7.1 The School respects the confidentiality of bursary awards made to families and recipients are expected to do likewise. The School may inform tutors and Heads of House if a pupil is a bursary holder but will not pass on any of the financial circumstances giving rise to the award.
- 7.2 The information gathered by Bursary Assessment Associates for the purpose of calculating the bursary is used for decision making concerning the remission of fees and other expenses only and is held in accordance with the Data Protection Act.

8. Other Sources of Bursary Assistance

- 8.1 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. Woodbridge School encourages parents 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:

The Educational Trusts Forum
Website: www.educational-grants.org

9. Compliance and Monitoring arrangements

This policy will be subject to a thorough review process including consideration at the appropriate Finance, Audit and Resources Committee on a 2 yearly basis. This will ensure that practice across the whole School is in line with this policy, the Complaints procedure and with current guidance and legislation.