

Forres Sandle Manor (Non-Academic) Policy

Policy Title	Means-Tested Bursaries
Policy Lead (Appointment (& Initials))	Bursar (CI-J)
Date of Last Review	September 2018
Date of Next Review	January 2020

MEANS-TESTED BURSARIES

GENERAL

The governors of Forres Sandle Manor (FSM) School are committed to broadening access to FSM by offering to eligible parents/guardians means-tested financial support with the payment of schools fees. Such support is known as a bursary and bursaries may be awarded in the form of a discount on tuition fees payable, depending on the financial, compassionate or other pertinent circumstances of applicants.

Bursary awards are subject to repeat testing of parental means and may be varied upwards or downwards, depending on the basis of a confidential evaluation of a family's financial circumstances (including savings, investments and realisable assets as well as their income, the size of their family, any other persons dependent upon them and compassionate or other pertinent considerations). Those individual parents'/guardians' circumstances will be carefully considered and reviewed each year.

Requests for financial support usually fall into 2 categories:

- New applicants to FSM 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parents'/guardians' circumstances has resulted in difficulty in meeting tuition fees and may result in the child being withdrawn part way through a stage of education.

THE APPLICATION PROCESS

Bursaries may be made available to parents/guardians of children entering *any year-group* of FSM. They are awarded at the discretion of the governors, and the Head and FSM Bursar are responsible for the management and coordination of the process.

- Parents/guardians seeking a bursary are required to complete an application form which seeks to establish the financial circumstances of the household. The form, which requests details of income and capital, is at Annex A and must be accompanied by full documentary evidence. The completed forms, together with the necessary documentary evidence, are to be submitted to the Bursar at least two months before the child intends to start at FSM.
- The Bursar assesses all applications in order to establish the likely level of support which will be required in order to allow the child to attend FSM.

- The Bursar prepares a recommendation which is considered with the Head and a joint recommendation is then reached.
- The joint recommendation is presented to the FSM governors for approval.
- The parents/guardians are advised whether their child is to be offered a place at FSM and of the bursary offer.
- Parents/guardians are then required to sign a letter accepting the place at FSM and an acknowledgement agreeing to any conditions relating to the bursary.

THE CASE FOR ASSISTANCE

The Head and Bursar 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 FSM is the first consideration in granting support.

SUITABILITY

In assessing a child's suitability, attention will be given to an informal academic assessment of each applicant but potential 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, 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 FSM. In normal circumstances, each applicant should meet FSM's normal academic requirements. Where a previous school has been attended, 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 need. Each case is assessed on its own merits and awards are made subject to FSM's ability to fund these within the context of what is viable and 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, FSM has a duty to ensure that all bursary grants are well focused and so, as well as current earnings, other factors which will be considered in determining the necessary level of grant and will include:

- The ability to improve the financial position or earning power of the family. For example, where there are 2 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 adults unrelated to the child or by outside sources.

- Where fees are being paid to other schools or universities, the FSM grant will take into account all these outgoings.
- Acknowledging that others might have a different view, FSM 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 or land holdings.

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 FSM.
- Where the social needs of the child are relevant (for example they 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 FSM adding to the stress of coping with the parents/guardians separating.

EXISTING PUPILS - CHANGE IN FAMILY CIRCUMSTANCES

Parents/guardians with a child at FSM whose financial circumstances suddenly change may apply for a bursary to the Head, explaining their situation and using the forms at Annex A. Such awards are subject to the availability of funding and cannot be guaranteed.

ANNUAL REVIEW

All bursary awards are subject to repeat testing of parental means each year and may be varied upwards or downwards depending on parental circumstances. Current 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. Decisions on bursary amendments will be made by the end of March, thus enabling parents to issue notice within FSM's specified timescale if necessary. For those previously in receipt of bursaries, the Head and Bursar, in making their joint recommendation to the FSM governors, have the discretion to recommend to the governors the reduction or withdrawal of 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 FSM (for example by the late payment of any contribution they are making to the fees).

CONFIDENTIALITY

FSM respects the confidentiality of bursary awards made to families and recipients are expected to do likewise.

OTHER SOURCES OF BURSARY ASSISTANCE

In addition to FSM 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 a fee-paying school and due to a change of circumstances may be unable to remain. FSM 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:

- The Bursar, FSM. Contact bursarsdept@fsmschool.com.
- The Educational Trusts Forum. Contact www.educational-grants.org.
- The Royal National Children's Foundation. Contact www.rncf.org.uk.

ANNEX A – Bursary Form – Please see PDF.