



**HALSTEAD**

PREPARATORY SCHOOL FOR GIRLS

**Bursary Policy**  
including  
**IAPS Charitable School Access Scheme**  
**INCLUDES EYFS**

<b>Policy Change History</b>		
Reviewed:	January 2015	JL
Reviewed:	January 2016	JL
Reviewed:	March 2017	TB
Review Date	November 2017	TB
Review Date	January 2018	TB PA
Next Review Date:	January 2019	

The Governors of Halstead Preparatory School are committed to broadening access to the school by offering to eligible parents/guardians means-tested financial support with the payment of school fees. Such support is known as a bursary and bursaries may be awarded in the form of a discount of up to 100 per cent 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 each year and may be varied upwards or downwards, depending on parental circumstances. Awards may be varied depending on individual 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.

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parents'/guardians' circumstances has resulted in difficulty in meeting tuition fees and may result in the child being withdrawn part way through a stage of education.

### **Awareness of the Bursary Scheme**

Information is 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. This information is included in the school prospectus, on the school website and in the local press by means of advertisements for open mornings.

### **Additional Guidance Points**

- The majority of bursaries are awarded for one academic year with effect from September and are reviewed annually. A renewal of a bursary would be dependent on continuing financial hardship.
- Bursary applications may be considered part way through an academic year for a period of one or two terms, subject to the individual circumstances of the applicant.
- Bursaries awarded vary depending on circumstances, and range from 20 – 100%. In the case of a 100% bursary an allowance may be considered for school uniform and residential trips.
- Parents are to enquire if they are eligible for assistance from other sources such as trusts or foundations before approaching the school.
- If fees are to be paid by a third party such as a grandparent, the sponsor must complete the Confidential Statement of Financial Circumstances.

### **The Application Process**

Bursaries may be made available to parents/guardians of children joining Halstead Preparatory School or existing pupils where the family situation has changed since original enrolment. They are awarded at the discretion of the governors and the Bursar is responsible for the management and coordination of the process.

**Step One** - 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, may be found 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.

**Step Two** - The Bursar will liaise with the Bursary Administration Company (BAC) who are employed on behalf of the school to act as independent assessors of applications in order to establish the likely level of support which will be required in order to allow the child to attend the school. This will involve a home visit to ensure the information has been correctly interpreted and the basis of the financial assessment has been fair.

**Step Three** - The Bursar shall arrange for a meeting of the Bursary Committee to be held at a suitable date. This Committee shall consist of the Headmistress, Bursar and two Governors. One of the Governors will be a member of the Finance Committee. The full identity of the parents requesting a bursary is confidential and only known to the Headmistress and Bursar.

**Step Four** - All documentary evidence and the independent assessment by the BAC will be presented to the Bursary Committee who will then make a decision on whether an award can be made.

**Step Five** - The parents/guardians are advised in writing whether their child is to be offered a bursary.

**Step Six** - Parents/guardians are then required to sign a letter acknowledging and agreeing to any conditions relating to the bursary. If a bursary is not awarded then a letter will inform them of the reasons why.

### **The Case for Assistance**

The Committee will consider a number of factors when making the judgement as to the justification for support and the extent of such support.

**Suitability** - in assessing a child's suitability, attention will be given to the academic assessment result of each applicant. Potential will 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 Headmistress, be likely to make sound academic progress following admission and possess the potential to develop the quality of her work and benefit from participation in the wider, extra-curricular activities on offer at the school. In normal circumstances, each applicant should meet the school's normal academic requirements. Previous 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 accordingly subject to the school's ability to fund these within the context of what is viable within its overall budget. It is recognised that judgements about what sacrifices a family should make to pay school fees will be personal. The school 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 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 wider family members, adults unrelated to the child or by outside sources.
- Where fees are being paid to other schools (or universities) the school's grant will take into account of all these outgoings.
- 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.

**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 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.

### **Existing Pupils - Change in Family Circumstances**

Parents/guardians with a child at the school whose financial circumstances suddenly change may apply for a bursary. They should contact the Bursar who will arrange for the necessary forms to be issued. Such awards are subject to the availability of funding and cannot be guaranteed.

### **Annual Review**

Current annual bursary holders will be issued with repeat means-testing forms at the beginning of the term prior to the expiry of their current bursary for return within 14 days. For those previously in receipt of bursaries, the Headmistress and Bursar 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 the school, for example by the late payment of any contribution they are making to the fees.

Due to the assessment nature of bursary applications and the different criteria that have to be considered, there is no appeal process for awards that may or may not be given.

### **Confidentiality**

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

### **Other Sources of Bursary Assistance**

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. Halstead encourages parents/guardians to apply for support where it is felt a good case can be made for assistance.

## **IAPS CHARITABLE SCHOOL ACCESS SCHEME**

Halstead is pleased to be part of the IAPS Charitable School Access Scheme (ICSAS). The scheme is designed to allow children from families which would never have the resources to pay for a prep school education to benefit from the opportunities such an education provides.

The IAPS scheme is limited and has specific application requirements and any applicants must be supported by the school. Application deadlines are usually in January annually.

Further information about the process and application forms can be requested from the Bursar.

Ratified by \_\_\_\_\_  
Chair of Governors

Date: Thursday 15<sup>th</sup> March 2018