

*Educational Bursary
Policy & Procedures*



The Beacon

General

Governors of The Beacon 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, which will be awarded in the form of a discount of up to 100% on tuition fees payable, depending on the financial, compassionate or other relevant circumstances of applicants.

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parents'/guardians' circumstances has resulted in difficulty in meeting tuition fees and may result in the child being withdrawn part way through a stage of education. Such requests are dealt with through the Beacon Bursary Fund (existing and administered independently of the School) and are not considered here.

What will the financial support cover?

The Educational Bursary Award will cover some or all of the following, according to financial need:

- School fees (up to 100%)
- School uniform and games kit
- Curriculum trips
- Music tuition
- Learning support

How will the eligibility for financial support be determined?

Awards will be determined depending on individual parents'/guardians' circumstances, e.g. their savings, investments and saleable assets, as well as their income, the size of their family, any other persons dependant upon them, etc. Further details about this are given below.

The Application Process - an overview

Bursaries may be made available to parents/guardians of children wishing to enter The Beacon in **Year 3 or above**. They are awarded at the discretion of the Governors, on the recommendation of the Headmaster and the Director of Finance & Operations, who are responsible for the management and coordination of the process. Other than the additional consideration of financial circumstances, the School's Admission's Policy will be followed – see Appendix C attached. The procedure and timetable to be followed is as follows:

• Application

Parents/guardians seeking a bursary are required to complete both a Bursary Award Scheme Application Form, which tells us about the child (Appendix A), and a Confidential Statement of Financial Circumstances that seeks to establish the financial circumstances of the household (Appendix B).

The Statement of Financial Circumstances requests details of income and capital, and must be accompanied by full documentary evidence.

Applicants should not hesitate to contact the Director of Finance & Operations, Mr Frank Muzika, on 01494 736168, should they require assistance in completing this form.

The completed forms, together with the necessary documentary evidence, are to be submitted to the Director of Finance & Operations no later than the end of the Spring half-term holiday for a bursary to start the following September.

• Initial financial assessment

The Director of Finance & Operations will assess all applications in order to establish whether the family's financial situation is appropriate for an award to be considered and, if so, the likely level of support which will be required in order to allow the child to attend the School. Further details of this are set out below.

• Pupil visit to the School

The School will invite eligible pupil candidates to attend the School in the second half of the Spring term and they will be assessed for their suitability for the School (see below).

• The offer

The information obtained from the financial and suitability assessments outlined above will be considered by the Headmaster and the Director of Finance & Operations and used to rank and choose between the candidates. The parents/guardians of the candidates will be advised whether they have been successful in obtaining a place at the School, and the level of any bursary award to be offered, before the start of the Summer Term. This offer may be subject to further verification of the information used in the financial assessment stage, which may involve the Director of Finance & Operations or other School representative visiting the parents'/guardians' home to ensure the information has been correctly interpreted and the basis of the financial assessment has been fair.

• Acceptance

Parents/guardians of successful candidates are then required to sign a letter accepting the place at the School and an acknowledgement agreeing to any conditions relating to the bursary. It is unlikely that either a registration fee or deposit would be required in respect of a pupil awarded a bursary.

The Assessment Process

The Headmaster and the Director of Finance & Operations 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 School is the first consideration in granting support.

• Suitability

In assessing a child's suitability, attention will be given to the academic assessment result of each applicant, but potential and contribution to the School will be considered, as well as present performance. Bursary funds are limited and those judged most suitable will be given priority as likely to gain most from the educational provision. Each pupil to whom support is offered must, in the opinion of the Headmaster, be likely to make sound academic progress. The potential to develop the quality of his work, and benefit from participation in the wider, extra-curricular activities on offer at the School will be taken into account. Each applicant will be expected to manage 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 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, the School has a duty to ensure that all bursary grants are well focussed and so, as well as current earnings, other factors which will be considered in determining the necessary level of grant. These 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 dependants, or the requirements of their partner's work.
- The level of capital savings and investments, and values of other assets owned, such as property.
- In cases of separation, any 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 School's grant will take into account 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 (in line with the Admissions Policy).
- 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.

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.

It is emphasised that a significant change to the level of award, particularly downward, will only occur in exceptional cases, e.g. where the family receives a large inheritance or other such significant lump sum. It would not be fair for the benefit of small increases in income or assets to be lost by an increase in fees payable to the School.

However, the Headmaster and the Director of Finance & Operations have the discretion to reduce or withdraw 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.

Confidentiality

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

Appendices attached:

- Appendix A Bursary Award Scheme Application Form
- Appendix B Confidential Statement of Financial Circumstances
- Appendix C School Admissions Policy