



Heath Mount School

Bursary Policy

Heath Mount School

**Independent Day and Boarding School for Boys
and Girls**

June 2018

1. Introduction

- 1.1. The Governors of Heath Mount School ('the School') are committed to broadening access to the School by offering to eligible parents/guardians means-tested financial support towards the payment of school fees.
- 1.2. Bursaries are subject to annual review and parents / guardians will be asked to provide updated financial information each a year that the pupil remains at the School. The annual review may result in bursaries being varied upwards or downwards.
- 1.3. All information supplied in the course of a bursary application will be treated as confidential and will be retained in accordance with data protection legislation.

2. Categories of requests for financial support

- 2.1. New applicants to the School in Year 3 and above where the parents / guardians wish to accept a place dependant on whether their application for a bursary is successful (see para. 5.1 below).
- 2.2. Existing pupils where a change in parents' / guardians' circumstances has resulted in difficulty in meeting tuition fees which may result in the child being withdrawn part way through a stage of their education.
- 2.3. Short-term hardship bursaries where a sudden change in parents' circumstances within an academic year prevent the parents / guardian applying through the standard application process.

3. Awareness

- 3.1. Information is provided by the School alerting the parents of current or potential pupils to the possibility of gaining means-tested financial support with the payment of fees is found in the following places:
 - 3.1.1. The School website;
 - 3.1.2. The School prospectus and other documentation, for example, our Parent Contract.

4. Administration

- 4.1. The School retains the Bursary Administration Ltd (BAL) to provide an independent assessment and report to the School on eligibility for bursaries. The reports are then considered by the Head and the Bursar before recommendations are made to the Governors (see paragraphs 5.4 and 6.3, below). For more information about the service offered by BAL, please visit: <https://www.schoolbursaryguide.com/>

5. The application process: new applicants to the School

- 5.1. Bursaries may be available to the parents / guardians of pupils entering the School in Year 3 or above. They are awarded at the discretion of the Governors and the Bursar is responsible for the management and co-ordination of the process.
- 5.2. Step one: parents / guardians seeking a place for their child / children at the School must complete a registration form, returning it to the School Registrar. At the same time, if applicable, they should request a Bursary Application Form. The detailed application form seeks to establish the financial circumstances of the household. The completed form must be submitted to BAL no later than the **31st October of the year before September entry**. Supporting documentation does not need to be submitted at this stage but will be required at the home visit.
- 5.3. Step two: a member of the BAL team will arrange a home visit to review the paperwork. BAL provide the School with a financial breakdown and report, including a recommendation of the level of support required in order to allow the

child to attend the School. Where possible, home visits take place by the **end of January before the September entry.**

- 5.4. Step three: The Head and the Bursar review the BAL reports and agree the recommendation or suggest amendments. This decision-making process is reviewed by the Finance Sub-Committee of the Board of Governors ('the Finance Committee'). The joint recommendation of the Bursar, the Head and the Finance Committee is presented to the Full Board of Governors for ratification. See paragraph 8.2, below for details on the suitability criteria the School will have in mind when making its decision.
- 5.5. Step four: parents / guardians are informed in writing by the **end of April preceding the September entry** if their application for a bursary has been successful.
- 5.6. Step five: parents/guardians are required to sign a letter to accept a place at the School and also to agree to any conditions relating to the bursary. The acceptance of both the place and the conditions attached to the bursary award must be returned to the School **within 21 days of receipt of the letter.**

6. The application process: existing pupils at the School

- 6.1. Bursaries may be made available to parents / guardians of existing pupils where a change in parents' / guardians' circumstances causes difficulty in meeting tuition fees which may result in the child being withdrawn part way through a stage of their education.
- 6.2. Step one: parents should contact the Bursar for a BAL form. Further information about BAL can be found here: <https://www.schoolbursaryguide.com/>
- 6.3. Step two: a member of the BAL team will arrange a home visit to review the paperwork. BAL provide the School with a financial breakdown and report, including a recommendation of the level of support required and the recommended duration of the Bursary. Supporting documentation does not need to be submitted at this stage but will be required at the home visit.
- 6.4. Step three: The Head and the Bursar review the BAL reports and agree recommendations or suggest amendments. Their decision is reviewed by the Finance Committee. The joint recommendation of the Head, the Bursar and the Finance Committee is presented to the Full Board of Governors for ratification.
- 6.5. Step 4: parents / guardians are informed in writing of the decision. If a bursary is provided, the letter will include details on the extent, duration and review dates of any bursary award and parents must sign a copy of the letter **within 21 days of receipt** to indicate their agreement to the all of the terms of the bursary award.

7. Short term hardship bursaries

- 7.1. Within the School's, annual budget, a sum is set aside as a short-term hardship fund. This fund is for:
 - 7.1.1. cases of sudden, unforeseen need and / or;
 - 7.1.2. circumstances whereby an application meriting bursary assistance was received outside of the normal calendar cycle for bursary submission, scrutiny and award.
- 7.2. The fund is set within budgetary constraints. Hardship bursaries are subject to the availability of funding and cannot be guaranteed.
- 7.3. Applications for short-term hardship bursaries should ordinarily be submitted to the Bursar.
- 7.4. All applications are considered by the Head and the Bursar. Given the nature of such applications, a decision will be communicated as quickly as possible and confirmed in writing.
- 7.5. The confirmation letter will cover the extent and duration of the short-term hardship bursary. It will also provide details of how to apply to the BAL if the

likelihood is that the changed circumstances will continue beyond the period covered by the short-term hardship bursary.

8. The Case for Assistance

- 8.1. Each application for a bursary is assessed on its own merits. Bursaries are awarded subject to the School's ability to fund these from the allocated annual budget.
- 8.2. Two criteria are considered when assessing the merits of an application falling within any of the above categories of assistance.
 - 8.2.1. **Suitability:** bursary funds are limited and those likely to gain most from the educational provision at the School will be given priority. Each pupil to whom support is offered must, in the opinion of the Head, be likely to make sound 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 the School. Each applicant should meet the School's academic requirements. Previous school reports will be consulted for evidence of good behaviour.
 - 8.2.2. **Financial limitations:** the amount of any bursary award depends entirely on the extent of financial need. 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 bursary awards take into account all relevant factors. Accordingly, the following factors will be considered in determining the extent of the bursary award:
 - 8.2.2.1. Current income;
 - 8.2.2.2. The ability to improve the financial position or earning power of the family. For example, where there are two parents / guardians, 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.
 - 8.2.2.3. 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 property.
 - 8.2.2.4. In cases of separation, the contribution made by the absent parent.
 - 8.2.2.5. Contribution to household costs by other, wider, family members, any adults unrelated to the child or by outside sources.
 - 8.2.2.6. Where fees are being paid to other schools (or universities) the school's bursary award will take into account these outgoings.
 - 8.2.3. The School considers that a payment of school fees must take precedence over activities such as: frequent or expensive holidays; new or luxury cars; investment in significant home improvements; a second property/land holdings. Such significant expenditure is inconsistent with the receipt of bursary assistance.

9. Timetable and annual review

- 9.1 All bursary awards are subject to annual means-testing and may be varied upwards or downwards depending on parental circumstances. A renewal application form must be completed and returned to BAL. Their recommendations will be forwarded to the Finance Committee along with the recommendations of the Head and Bursar, who have the right to recommend to reduce or withdraw a bursary award in the following circumstances:
 - 9.1.1 Where a pupil's progress, attendance, attitude or behaviour has been unsatisfactory and / or;
 - 9.1.2 Where the parents / guardians have failed to support the School, for example by the late payment of any contribution they are making towards the fees.

- 9.2 A bursary award may be withdrawn in accordance with (or by reference to) the terms upon which such award is made and / or if, in the opinion of the Head, the pupil's attendance, attitude or behaviour no longer merits the continuation of the bursary. Any such withdrawal of a bursary will not operate so as to increase the fees in respect of a term which has already commenced.
- 9.3 Where it appears likely to the Head and the Bursar that a bursary may be withdrawn in respect of a pupil, the parents / guardians will be notified as far in advance as is practical.
- 9.4 If **within 14 days** following the withdrawal of a bursary a pupil is withdrawn from the School, no fees in lieu of notice will be payable by the parents / guardians. This will give parents / guardians enough time to decide whether they want to continue to educate their child at the School.
- 9.5 The timetable for new applications and renewals is set out below:
- 9.5.1 Applications and renewal forms should be returned to the BAL by **30th September prior to the September entry.**
- 9.5.2 Reports to be received by the School from BAL **by end of January prior to the September start of the school year for which the bursary is sought.**
- 9.5.3 The Finance Committee consider all applications at their Lent term.
- 9.5.4 The Bursar informs all applicants of decisions in writing as soon as is reasonably practical following the Lent term Finance Committee meeting.
- 9.5.5 Applicants sign and return a letter agreeing to any conditions relating to the bursary **by end of the Lent term prior to the school year for which the bursary is sought.**

10. Appeals Process

- 10.1. An appeal regarding any bursary decision is permitted in the following circumstances:
- 10.1.1. When it is made within 3 months of receipt of a bursary award decision;
- 10.1.2. When there is a material change in the family's financial situation since the original application.
- 10.2. Any appeal based upon the above criteria will be reviewed by the Chair of the Finance Committee. If it is outside of the 3-month window, then it will be subject to the submission of a new application.

11. Confidentiality

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

12. Contact details

- 12.1. All bursary queries and applications should be directed to the Bursar: Nikki Slowey (Mrs), Sloweyni@heathmount.org

Governors' committee reviewing	Finance Committee
Date last formally approved and became effective	14 June 2018
Period of review	Two years
Next review date	June 2020 effective for September 2020
Person responsible for implementation and monitoring	Bursar
Other relevant policies	Admissions Policy Parent Contract