



Bursary Policy

Updated 6th December 2017

1. Introduction and Background

The Governors of St Albans 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. Bursaries may be awarded in the form of a discount of up to 100% of tuition fees payable, depending on the financial, compassionate or other pertinent circumstances of applicants.

*Parents should read this policy carefully before submitting an application for Bursary support, and in particular, the part of Section 2.2 “**The Case for Assistance**”. A family income of >£70,000 p.a., significant savings or investments, and the ownership of property other than the home in which the child resides, are very likely to disqualify bursary applications and parents in these circumstances should not apply.*

Parents should also note the important Data Protection notice on Page 6 of this document.

The guiding principles for the award of Bursaries are as follows:-

- Bursaries may be up to 100% of tuition fees and are unlikely to be awarded for amounts less than 40%;
- the School may, at the discretion of the Headmaster and the Bursar, make additional awards over and above the cost of the tuition fees for specific activities, such as coach travel or essential educational trips; and
- there is a presumption that the pupil will be worthy of an award.

All awards are conditional, and the award letter is clear about these conditions (see Appendix). If these conditions are breached, the award may be withdrawn by the School.

Bursary awards are subject to detailed initial testing of parental means which will be repeated each year and may be varied upwards or downwards, depending on parental circumstances. This testing may include a home visit made by the School or its representatives. Awards are made on the basis of the confidential scale of awards which sets out award levels in relation to a family's financial circumstances. The scale of awards is reviewed and revised annually by the Bursar to reflect any changes in fee costs and is approved by the Governors.

Although 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, 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.

2. New Applicants to the School

Information 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 is included in:

- The School prospectus;
- the School website; and
- the press by means of advertisements, including advertisements placed by the London Schools Fee Assistance Consortium of which the School is in membership.

2.1 The Application Process

Bursaries may be made available to parents/guardians of children entering the School at any usual point of entry. They are awarded at the discretion of the Headmaster and Bursar in accordance with the policy agreed by the Governors.

1. Parent/guardians seeking a Bursary are required to tell the School of their application for bursary funding as part of the registration process, and are expected to have read this policy before entering the process. Parents will subsequently be asked to complete an application form which seeks to establish the financial circumstances of the household. The form, which requires details of income and capital, must be accompanied by full documentary evidence. The completed forms, together with the necessary documentary evidence, are to be submitted to the Bursar by the specified date in any given year, usually in December for Bursaries to start the following September. These will usually be collated and assessed by Bursary Administration **Limited on the School's behalf**. A home visit may be necessary.
2. The School assesses all 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 may involve the Bursar, or his

representative, visiting the **parents'/guardians' home to ensure the information has been correctly interpreted and the basis of the financial assessment has been fair.**

3. The Bursar prepares a recommendation in accordance with the confidential scale of awards which is considered with the Headmaster and a joint decision is then reached in accordance with the Bursary Policy agreed with the Governors.
4. An annual report is presented to the Finance Committee of the Governors for information.
5. The parents/guardians are advised whether their child is to be offered a place at the School and of the Bursary offer. Where the available Bursary funds are insufficient to enable an award despite the evidence of the means-test process, the parent/guardians will be asked whether they wish their son/daughter to be placed on a waiting list in case further funding becomes available or other awards offered are declined.
6. Parents/guardians are then required to sign the Acceptance Form accepting the place at the School, the acceptance of which is explicitly deemed as agreement to the conditions relating to the Bursary (Appendix A).

Parents should note that the bulk of bursaries are allocated on entry; if a bursary is not granted on entry to the School, a subsequent grant of a bursary is highly unlikely unless there is a significant and demonstrable change in circumstances (see section 3 below). Parents should therefore not take up a place if they feel that they cannot afford to pay the fees, nor should they have an expectation that once a pupil has joined the School, the decision not to award bursary funding might be reversed.

2.2 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. These factors include:-

- Suitability – **in assessing a child's suitability, attention will** be given to the academic assessment results of each applicant but potential and educational background will also be considered as well as actual achievement. Bursary funds are limited and priority will be given to those judged most likely to gain most from the educational opportunity. Each pupil to whom support is offered must, in the opinion of the Headmaster, 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 and contribute to the wider, co-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 (i.e. the % of the fee remission) 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. However, 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 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 property. Ownership of second properties (other than the residence in which the child resides) is likely to disqualify applicants from Bursaries. Assets owned abroad must also be disclosed.
 - In cases of separation, the **ability of both parents to support the child's education; it is unlikely that the School will provide Bursary support for a child whose parents, through divorce or separation, do not co-operate to contribute jointly and appropriately, in whatever proportion necessary, to the child's welfare, including school fees.**
 - Contribution to household costs and school fees 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, and consideration will also be given to the level of support provided by those other institutions; for example, it is unlikely to be fair for St Albans School to provide large bursaries for one child because parents/guardians are paying a full fee elsewhere for a sibling.
 - Acknowledging that others might have a different view, the School considers that the following would not be consistent with the award or ongoing receipt of a Bursary:
 - frequent or expensive holidays;
 - new or luxury cars;
 - investment in significant home improvements;
 - property/land holdings other than the property in which the relevant child lives;
 - attendance on discretionary, non-educational school trips. These must be discussed with the Bursar prior to committing.
- 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, noting also that the School is unlikely to provide more than the equivalent of one full bursary place for that family;
 - where the social needs of the child are relevant;
 - where a parent/guardian is terminally ill or is unable to secure permanent employment due to poor health; and
 - where a separation has resulted in the child having to be withdrawn from school adding to the stress of coping with the parents/guardians separating.

3. Existing Pupils - Change in Family Circumstances

Within overall budget funding, the School will in normal circumstances set aside each year a modest hardship fund to provide for cases of sudden, unforeseen need or where applications meriting Bursary assistance are received out 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 to the Bursar, explaining their situation. *This must be a significant new situation that has emerged since the child started at the School, such as illness, death or redundancy. Parental divorce/separation is unlikely to be a good reason, on its own, for a hardship award.* Such awards are subject to the availability of funding and cannot be guaranteed. It is likely that any such hardship awards will be time-limited, usually to the end of the academic year or some other natural break-point in **the pupil's education, such as after important public examinations** or at a natural point of entry into another school, e.g. at the end of Year 8 or Year 9.

4. 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 recipients will be issued with repeat means-testing forms and these must be returned within the specified timescale. If completed forms are not completed by the required deadline and no satisfactory explanation is received, the award will cease at the end of the current academic year. For those previously in receipt of Bursaries, the Headmaster and Bursar, in making their joint decision in accordance with the Policy agreed by the Governors, 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. The School may require parents/guardians in receipt of a Bursary to submit additional mid-year information when more up to date financial information/details becomes available, such as a P60 issued by employer post April year end.

The School also reserves the right to withdraw any award retrospectively if the pupil is withdrawn prior to their normal leaving date.

5. Confidentiality

The School respects the confidentiality of Bursary awards made to families and recipients are expected to do likewise. The obligation to make full disclosure of any change in circumstances pertinent to eligibility for the existing award is binding upon signing the acceptance form. If the School becomes aware or is made aware that the information provided is not accurate, the Bursary award may be amended or terminated the following term. In all circumstances parents/guardians are bound by our **Terms and Conditions including the requirement to give a full term's notice of withdrawal from the School before the normal leaving date.**

6. 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 who may be unable to remain at that school due to a change of circumstances. The School encourages parents/guardians to apply for support from these trusts where it is felt a good case can be made for assistance and will expect to see evidence of such applications as part of the documentation submitted by parents/guardians.

7. Final Remark

There are limited funds available for Bursaries, therefore in order to allow the School to offer financial assistance to future applicants, we hope parents/guardians who have benefited from Bursary funding will consider repaying all or part of the Bursary received, when and if their circumstances allow. Furthermore, we trust that Old Albanians who benefited from Bursary support will want to contribute to the funding of future Bursaries via donations to the St Albans School Foundation when their future financial position so allows.

IMPORTANT NOTE REGARDING DATA PROTECTION

The School will need to collect and use information relating to pupils and parents for the purpose of evaluating an application for a Bursary. This may include (but is not limited to) name, address, contact information and detailed financial information. This information is used for the purpose of enabling the School to evaluate any Bursary application that is made to it, voluntarily, by parents/guardians. This information may be collected and analysed by Bursary Administration Limited on behalf of the School, but otherwise will not be shared with any third parties. The School will process personal data in accordance with the Data Protection Act 1998 (as amended or superseded including from 25 May 2018 the General Data Protection Regulation) and other related legislation. Personal data relating to unsuccessful applicants is deleted within three years of the end of the application process, except that a record of the applicant's name and a basic description of the reason they were unsuccessful is retained for the School's internal records.

*Upon written acceptance of a place at the School, the **School's Terms and Conditions** will apply and a **successful pupil's/parents'/guardian's personal data will be processed in accordance with Section 10 of that document** (and any other privacy notices which the School provides to individuals from time to time).*

APPENDIX

CONDITIONS OF AWARD

1. Obligations of the pupil: a pupil who is the subject of an Award is required to work hard, to contribute positively to the life of the School, to be a credit to the school and to set a good example to other pupils. These are the *Purposes of the Award*.
2. Obligations of the Parent/s: the parents are expected to support and encourage the pupil to achieve the purposes of the Award and to uphold the aims and the good name of the School. The parents are also required to pay the balance of the account by the first day of term.
3. Withdrawal of the Award: the Award may be withdrawn by written notice sent to a parent if, in the opinion of the Headmaster, the pupil or a parent has not complied with the obligations set out at paragraphs 1 and 2 above or otherwise the pupil has fallen below the required standards of conduct and progress and in the further opinion of the Headmaster there has been no significant improvement following consultation with a parent and/or the pupil and a written warning. Withdrawal of the Award shall take effect from the start of the following term. Withdrawal of an award may also give rise to a liability to repay benefits received: see clause 4a.

Further, the Award may be withdrawn by written notice if the balance of the account remains unpaid 28 days after a written reminder has been sent to the parents.

4. Repayment events: scholarships are awarded in the expectation that they will be held until the end of the Upper Sixth year (the normal leaving age). Parents shall be required forthwith upon written notice to repay all or part of the benefits they have received under the Award in any of the following circumstances:
 - a) **up to three terms' benefits (if received) if the award is withdrawn by the School in accordance with clause 3 above;**
 - b) in the event that the pupil has been expelled or removed from the School for reasons of misconduct by the requirement of the Headmaster, the School will require repayment of the full value of the Scholarship from which the pupil has benefited;
 - c) where parents decide to withdraw an award holder from the School before the end of the Upper Sixth year, the School will require repayment of the full value of the Scholarship from which the pupil has benefited.
5. Fees in lieu of notice: for the avoidance of doubt, the benefits payable under an Award do not apply to any term for which the School has required payment of fees in lieu of notice.
6. Standard Terms and Conditions: these Conditions of Award take precedence over any of the **School's standard terms and conditions which are inconsistent with them but in all other respects the standard terms and conditions as amended from time to time shall apply and these Conditions of Award shall be interpreted in accordance with them.**