



**Richmond House School**

Bursary Policy		Associated Policies
<b>Last reviewed</b>	January 2019	Admissions
<b>Next review</b>	<b>January 2022</b>	
<b>Gov. sub-committee</b>	Finance and General Purposes	
<b>Owner</b>	Bursar	

**General**

The Governors of Richmond House School are committed to broadening access to the school by offering to eligible parents/guardians means-tested financial support with the payment of schools fees. Such support is known as a Bursary and these may be awarded in the form of a discount (typically of around 25% but may be up to 100%) on tuition fees payable, depending on the financial, compassionate or other pertinent circumstances of applicants.

A bursary fund is set aside each year by the Governors but we receive many more applications than we are able to fund. The number and level of bursaries awarded is completely at the discretion of the Governors.

Bursary awards are subject to repeat testing of parental means each year and may be varied upwards or downwards, depending on parental circumstances. As a guide, no award will be made where the combined gross income of the parents/guardians for the applicant exceeds £60,000. Awards are made on the basis of the Richmond House School 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 approved by the Governors. Though 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 fall into one of three categories:

- Means tested bursaries: Pupils moving from nursery into reception or new applicants to the school where a place has been offered but parents/guardians require some level of assistance to be able to fund the tuition fees. Bursaries are awarded from the term after the child turns 5 and are typically awarded up to 25% of the fees payable. Priority will be given to children who have attended the Richmond House School nursery.
- Transformational bursaries: New applicants to the school, where a place has been offered as the child shows exceptional academic potential and parents would not otherwise be able to afford the full fees. Bursaries are available for children from year 3 to year 6 **up to** a value of 100% of fees. The School may work alongside Itrust to offer this level of assistance (ITrust providing up to 50% funding and school providing up to the other 50%)

- Hardship bursaries: 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 Bursaries. Our Bursaries are referred to on our school website under the Fees section and this policy is held within Policy Documents under the "About Us" section.

#### The Application Process

Bursaries are awarded at the discretion of the Governors. The Head teacher and Bursar are responsible for the management and coordination of the process. The application process is detailed below:

#### **Process for Means tested bursaries for new pupils and Transformational Bursaries**

- Step One. During January. Half day assessment of the pupil along with a parent/guardian meeting with the Head teacher or Bursar (for pupils not already within the school)
- Step Two. By end of January parents/guardians will be notified whether a place will be offered to the pupil (for pupils not already within the school)
- Step Three. Parents/guardians seeking a bursary are required to complete a Bursary Application Form which seeks to establish the financial circumstances of the household. The form requests details of income and capital and must be accompanied by full documentary evidence. The completed form, together with the necessary documentary evidence, are to be submitted to the Bursar **by end of February** in any year for bursaries to start the following September.
- Step Four. 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 the School. This may involve the Bursar, or a representative from BAL, a third party company, visiting the parents/guardians' home to ensure the information has been correctly interpreted and the basis of the financial assessment has been fair.
- Step Five. The Bursar prepares a recommendation which is considered with the Head teacher and a joint recommendation is then reached.
- Step Six. The joint recommendation is presented to the School Governors for approval.
- Step Seven. The parents/guardians are advised of the Bursary offer.
- Step Eight. Parents/guardians are then required to sign an acceptance form and an acknowledgement agreeing to any conditions relating to the bursary.

#### **Process for Means tested bursaries for existing pupils**

- Step One. Parent/guardian meeting with the Head teacher or Bursar
- Step Two. Parents/guardians seeking a bursary are required to complete a Bursary Application Form which seeks to establish the financial circumstances of the household. The form requests details of income and capital and must be accompanied by full documentary evidence. The completed form, together with the necessary documentary evidence, are to

be submitted to the Bursar **by end of February** in any year for bursaries to start the following September.

- Step Three. 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 the School. This may involve the Bursar, or a representative from BAL, a third party company, visiting the parents/guardians' home to ensure the information has been correctly interpreted and the basis of the financial assessment has been fair.
- Step Four. The Bursar prepares a recommendation which is considered with the Head teacher and a joint recommendation is then reached.
- Step Five. The joint recommendation is presented to the School Governors for approval.
- Step Six. The parents/guardians are advised of the Bursary offer.
- Step Seven. Parents/guardians are then required to sign an acceptance form and an acknowledgement agreeing to any conditions relating to the bursary.

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

Within overall budget funding, the School will in normal circumstances set aside each year a Hardship Fund, for cases of sudden, unforeseen need or in exceptional cases 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 and using the Bursary Application Form. Such awards are subject to the availability of funding and cannot be guaranteed.

### 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 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 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 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 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 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 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.
    - Where the social needs of the child are relevant (eg: 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 which must be completed by the deadline date given to be considered. For those previously in receipt of bursaries, the Head and Bursar, in making their joint recommendation to the School 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 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 required 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. Richmond House School 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.

Examples of such organisations are found via:  
The Educational Trusts Forum  
Website: [www.educational-grants.org](http://www.educational-grants.org)

**A review of this policy, through the Governing body and the SLT, will be undertaken within 3 years of the last review date.**

*Helen Stiles*

Signed (Headteacher):

**Policy Reviewed January 2019**



Signed (Chair of Governors):