KING EDWARD'S SCHOOL
POLICY DOCUMENT

Title: Bursary Policy

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Bursary Policy

1. Introduction

This policy outlines details of the means-tested Bursary Programme currently in operation at King Edward's School, Bath (KES). It seeks to answer some of the more frequent questions asked by parents/guardians of current and prospective pupils. This policy has been authorised by the Governing Body of KES.

KES is a registered charity (number 1115875) that is committed to providing significant public benefit. As an educational charity, KES remains committed, where possible, to providing means-tested bursary support for those children and young people whose families would otherwise not be able to afford for them to attend the Senior School.

Whilst KES has a long history of providing financial assistance to pupils and their families, the School does not have substantial endowments or grant income and so has to fund many of the bursaries awarded from its own budget. In addition, some bursaries are funded by philanthropic donations or by an associated body such as the King Edward's School, Bath 1552 Foundation, the Old Edwardians (former KES students) and/or KES Parents.

The funds which the School has available to support its means-tested bursary programme are ultimately limited and it is not possible to meet all requests for support.

The School's long-term vision is that our Bursary Programme will ultimately be able to provide the necessary financial support so that any pupil offered a place at the Senior School can attend the School, regardless of their family's financial circumstances.

Please note that this policy relates only to the School's means-tested Bursary Programme. It does not cover the School's Academic Scholarship or Special Talent Awards, which are not means-tested and which are available for pupils joining the Senior School in Year 7. Academic Scholarships recognise outstanding performance in the Year 7 entrance assessments, while Special Talent Awards recognise exceptional ability in Art, Drama, Music or Sport. Scholarships carry a 10% fee reduction and Special Talent Awards a 5% fee reduction.

It is possible for a pupil to hold an Academic Scholarship, a Special Talent Award and a means-tested bursary or any combination of these. For further information on these awards, please see our website.

2. What are means-tested bursaries?

A bursary is a means-tested financial award made by the School to assist families to pay the school fees if they require financial assistance to do so. In some cases, financial assistance is also available to cover other costs associated with a pupil's attendance at the School (e.g. lunches, transport, uniform, co-curricular activities etc).

3. Types of Bursaries available at KES

a. Entrance Bursary

Entrance bursaries can be awarded to new pupils joining Years 7 and 12 whose families cannot afford to pay the full fees but who have met the criteria of the School's Admissions Policy and have been offered a place at the Senior School. Entrance bursaries are not available to pupils joining the School in years other than Year 7 and 12.

b. Hardship or Emergency Bursary

Bursaries are sometimes available to families whose financial position worsens unexpectedly during a pupil's education at the Senior School. This type of bursary is usually available on a short term basis only with the aim that a pupil's education is not disrupted at an especially challenging time. We urge parents/guardians to contact the Bursar (bursar@kesbath.com) as soon as possible to discuss such instances.

c. Bursary Plus Programme

Through the School's Bursary Plus Programme, pupils on very significant bursaries (i.e. in excess of 75%) may also be eligible for additional support to cover other costs associated with a pupil's attendance at the School – including support for lunches, transport, uniform, co-curricular trips, music lessons etc. Where parents of bursary holders require this assistance, they should make direct contact with the Bursar (bursar@kesbath.com).

4. Bursary Eligibility

Bursary awards are made based on an assessment of a family's financial circumstances, including their income, outgoings, savings, property value and the value of any other realisable assets and also takes into consideration the size of their family, any other dependants and other relevant factors.

Bursary awards are determined on a sliding scale according to financial need, with higher levels of income or assets corresponding to lower levels of means-tested bursary support.

The criteria below are provided as an indication of the circumstances in which a pupil may be considered for bursary support **where there is only one pupil at the School** (please see below for details on siblings):

A pupil **may** be eligible for a **full** bursary where the following criteria are met:

- Total gross household income is below £50,000.
- The family has minimal assets such as savings (i.e. below £10,000) and/or a property of a modest value (as determined by the School) for the local city or region.

A pupil **may** be eligible for a **partial** bursary where the following criteria are met:

- Total gross household income is below £110,000 but above £50,000.
- The family holds a modest level of savings (i.e. below £20,000) and/or a property of an average value (as determined by the School) for the local city or region.

In order to ensure that the School can demonstrate appropriate use of its charitable funds on the awarding of bursaries, the School will not usually consider awarding bursaries of any value to families where any of the following criteria apply:

- Where a family has significant savings (i.e. in excess of £30,000), excluding pensions;
- Where any primary residence owned by a family is of a value materially in excess of the average house price (as determined by the School) for the local city or region;
- Where a family owns a second property;
- Where only one parent or guardian is in paid employment, unless the other parent or guardian is actively seeking employment, or is unable to work due to illness, disability, caring responsibilities for an immediate relative or another circumstance accepted by the School.

Where one or more of the above criteria apply to a potential applicant, but they consider that there are other factors which should be taken into consideration, applicants are asked to contact the Bursary Support & Educational Partnerships Lead, Freya Geary-Smith (f.gearysmith@kesbath.com) to discuss their circumstances prior to any application being made for a Bursary.

How the School considers siblings in the Bursary process:

Where there is more than one child attending KES, the School will consider any fees paid for siblings already attending KES. The cumulative cost of educating more than one child at KES will be taken into account when determining a family's ability to contribute towards fees and this may result in the School awarding a means-tested bursary despite the family having a slightly higher combined household income than the figures presented above.

5. The Bursary Application Process

As part of the application process to join the Senior School, parents should notify the Admissions Team (via the application form) if they believe that they would require a means-tested bursary to enable their child/ren to attend the School.

The School will then provide the relevant family with details on how to progress with the application for the bursary.

The School uses a third party (Bursary Assessment Associates - BAA) to manage the initial bursary application assessment and this process requires the family to share the relevant financial information and to have an online meeting with representatives of BAA.

The initial assessment seeks to obtain a full picture of a family's financial situation and the level of support that would be required by a family for their child/ren to attend KES if a place at the School was offered.

All individuals holding parental responsibility will be required to complete the financial assessment, unless directed otherwise by a Court Order (See Section 6 'Parental Responsibility' below).

Bursary applications which do not contain the relevant information or supporting documentation will not be considered by the School. Where applications are received after the application deadlines (please see below) there is a very high likelihood that no award will be made as our limited funds are likely to have been fully allocated.

Applications for a School place must be submitted by the relevant admissions deadline for Year 7 or Year 12 entry. Applications for an Entrance Bursary must then be submitted by the bursary application deadline, which falls shortly after the initial School place application deadline. These dates are available from the School's website and the School's Admissions Team.

Ordinarily, applicants are required to follow the wider School admissions process, including the payment of a non-refundable registration fee. However, the School does not wish the payment of the registration fee to be a barrier to submitting an application. Accordingly, parents who can provide evidence that they are in receipt of Universal Credit should notify the Bursary Support & Educational Partnerships Lead, Freya Geary-Smith (f.gearysmith@kesbath.com) and the registration fee will be waived.

Where applicants have applied for a means-tested bursary, these will be considered jointly by the Headmaster and Bursar and decisions on any means-tested bursary award are communicated at the same time as the offer of a place at the School.

Where there is over-subscription for means-tested bursaries, awards will take into account an applicant's academic performance and potential and their ability to make contributions to the wider life of the School.

Applications for hardship/emergency bursaries for current pupils may be made at any time during the year and will be considered by the Bursar and Headmaster as soon as possible after the School has been informed of the difficulty.

Each bursary decision will reflect the circumstances of the applicant and the availability of School funds. Any awards made will usually be expressed as a % of the total school fees. Once awarded, unless parental financial circumstances change, bursaries will usually continue throughout the pupil's time at the School.

All awards are also ultimately subject to the School's own financial position and could be withdrawn if there was a material change to the School's financial circumstances. The School would endeavour to give a minimum of a term's notice of such changes but bursary holders should recognise that this may not always be possible.

Where, in the School's view, the assessment shows that there is no financial need, no bursary will be awarded.

Where the School or BAA believes that relevant information has been withheld during the Bursary application process, or where relevant information arises after the assessment which, in the School's opinion, would have impacted the assessment outcome, the School has the right to immediately remove a bursary.

The School's decision on the awarding of any bursary is final and there is no appeal process.

6. Parental Responsibility

For the purposes of bursary assessment and administration, the School requires accurate information regarding those who hold parental responsibility for a child and we expect all individuals with Parental Responsibility to complete the Bursary application assessment.

Parental responsibility refers to the legal rights, duties, powers, responsibilities and authority that a person has in relation to a child. In order to maintain accurate records, the School asks parents during the registration and admissions processes to provide certain information including the name of all those with parental responsibility, their addresses, contact details and who the child lives with.

Individuals with parental responsibility are entitled to be involved in significant decisions relating to their child and to be treated fairly and equally by the School, except where a Court Order provides otherwise.

In exceptional cases, the School may waive the requirement for all individuals with Parental Responsibility to complete the Bursary application assessment. However, such circumstances are very rare and would need to be discussed directly with the Bursary Support & Educational Partnerships Lead, Freya Geary-Smith (f.gearysmith@kesbath.com) prior to application.

Where any contact between the pupil and those with Parental Responsibility exists, the School will always require these individuals to complete the Bursary assessment, subject to any terms of the Court Order.

It is the responsibility of parents to inform the School when there is a change in the family's circumstances.

7. Annual review & material changes to a family's financial circumstances

All bursaries are subject to annual review and may be varied up or down if family financial circumstances alter, but this will always be done in discussion and consultation with parents/guardians.

The annual review will be conducted through the Bursar's office during the Spring and early part of the Summer Terms. The School usually uses the Third Party organisation, BAA, to manage its annual review process and the process may also involve an on-line meeting with representatives of this third party.

Parents/guardians are also required to inform the School during the year if there is any material change to their financial circumstances so that the School can review the existing bursary award.

8. What is expected of a pupil and family receiving a bursary?

Parents/guardians are expected to pay the remainder of the School fees due at the time required by the School contract.

Any 'extras' such as trips, lunch, school uniform or any specialist activities are payable in full.

However, where means-tested bursary holders require support for any of these extras, they should notify the Bursar and consideration will be given to the level of any additional support which may be available through the School's Bursary Plus Programme noted above.

We expect all pupils in receipt of a bursary to demonstrate a real desire to make a positive contribution to the life of the School. Any failure to meet satisfactory attendance, behaviour or academic performance may, in exceptional circumstances, mean a bursary is withdrawn and full fees would become payable. In addition, the persistent failure to meet the payments for any remaining School fees due could also result in the removal of the bursary award.

These decisions would be taken jointly between the Headmaster and Bursar and, where appropriate, in consultation with Governors.

In line with the School's Privacy Notice, if the bursary is funded by a philanthropic donation, the School may share information with the Donor such as pupil progress and details about the bursary award the pupil receives.

General information about bursary holders may also be used in promotional materials and communications but all information used in these circumstances will be anonymous unless the parents/guardians and/or the pupils have chosen to share their first name and photograph.

9. Records

Information obtained during the implementation of this Bursary Policy will be held with due regard to data protection legislation and the School's Privacy Notice and Data Protection Policy which are available from our website. Bursary Assessment Associate's Privacy Policy is also available from their website.

10. Contact

If you have any further questions about the School's means-tested bursary programme, please do not hesitate to contact our Bursary Support & Educational Partnerships Lead Freya Geary-Smith on 01225 464313 (Extn 258) or via email at f.gearysmith@kesbath.com.