



Haberdashers'
Monmouth Schools

Bursary Policy

1. Introduction

Enabling bright, young people from all backgrounds to be educated at the Haberdashers' Monmouth Schools Ltd (HMSL) Senior Schools is vital to the spirit of openness and opportunity that is core to our ethos. We are extremely proud of the social diversity at HMSL and believe it is one of the unique features that make our schools so special. The Governors are committed to broadening access to the schools by offering financial support with the payment of school fees through the provision of bursaries to help fund the fees of talented pupils who will benefit from the education opportunities offered by our two senior schools. Such bursaries are means-tested and for parents/guardians on low incomes there may be a discount in exceptional circumstances of up to 100% of tuition fees plus help with extras. Bursaries above 25% of the fee are subject to annual review with the remainder being reviewed biennially and parents/guardians will be asked to provide updated financial information when there is change while the pupil remains in the schools. The annual review may lead to the means-tested support being varied upwards or downwards, depending on parental circumstances.

2. The Case for Assistance

The respective Heads 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. Each applicant should meet the school's normal academic requirements. In the first instance, bursary funds will be available to help those families whose child has successfully won one of the scholarships set out in our Annual Information booklet but who are still unable to pay all the fees. Previous school reports will be consulted for evidence of good behaviour. Good conduct and continuing good performance will be a pre-requisite for the continuation of a bursary throughout the education of a pupil.
- **Financial Limitations:** Each case is assessed on its own merits and awards are made accordingly, subject to HMSL'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, HMSL 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:

- o 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.
 - o 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.
 - o Contribution made by an absent parent in cases of separation.
 - o Contribution to household costs by other, wider, family members such as grandparents, step parents, aunts and uncles, any adults unrelated to the child or by outside sources.
 - o Where fees are being paid to other schools (or universities) the School's grant will take into account all these outgoings.
 - o Acknowledging that others might have a different view, HMSL 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:
 - o Where a child has siblings at the School.
 - o Where the social needs of the child are relevant (eg: may be suffering from bullying at their present school).
 - o Where a parent/guardian is terminally ill or is unable to secure permanent employment due to poor health.
 - o 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.
 - o Forces families who do not qualify for CEA will be awarded a 10% bursary from reception onwards.

3. Categories of financial support

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/guardian' circumstances has resulted in difficulty in meeting tuition fees and may result in the child being withdrawn part way through a stage of education

4. New Applicants to the schools

Awareness: Information provided by the schools alerting the parents/guardians of potential pupils to the possibility of gaining means-tested financial support with the payment of schools fees is included in:

- The Schools' prospectus.
- The Schools' website.
- The local press by means of advertisements.

The Application Process:

Bursaries may be made available to parents/guardians of children entering Years 7 – 12 of the HMSL (see HMSL's Admission's Policy. The Heads of the two Senior schools and the Bursar are responsible for the management and coordination of the process.

- Step One. Parents/guardians seeking a bursary are required to complete an application form which seeks to establish the financial circumstances of the household. The form, which requests details of income and capital, may be found at Annex A and must be accompanied by full documentary evidence. The completed forms, together with the necessary documentary evidence, are to be submitted to the Bursar on a date agreed each year between the Bursar and Head of Admissions in any year for bursaries to start the following September.
- Step Two. The Bursar and the Accountant assess 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 representative, visiting the parents/guardians' home to ensure the information has been correctly interpreted and the basis of the financial assessment has been fair.
- Step Three. The Bursar prepares a recommendation which is considered with the Head and a joint recommendation is then reached. This is usually a percentage of the fees rather than a fixed amount.
- Step Four. The Head together with the Bursar sets the budget for new bursaries for the schools in line with the five year financial plan.
- Step Five. The parents/guardians are advised in February whether their child is to be offered a place at the school and Bursary offer.
- Step Six. Parents/guardians are then required to sign a letter acceptance relating to the place at the school and an acknowledgement agreeing to any conditions relating to the bursary. This is then returned to the school with the relevant deposit.

5. 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 where applications meriting bursary assistance are received out of the normal calendar cycle for bursary submission, scrutiny and award. There are also funds which can help pupils with incidental expenditure such as trips. 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 forms at Annex A. Such awards are subject to the availability of funding and cannot be guaranteed.

6. Annual Review

All bursary awards above 25% of fees are subject to repeat testing of parental means each year with the remainder being reviewed biennially 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 April each year for return by the end of the month. For those previously in receipt of bursaries, the Bursar has the discretion, after consultation with the respective Head, 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.

7. Confidentiality

The school respects the confidentiality of bursary awards made to families and recipients are expected to do likewise. A breach of confidentiality could place in jeopardy an award of a bursary.

8. Other Sources of Bursary Assistance

Grants are sometimes available from outside sources such as:

The Educational Trusts Forum
Website: www.educational-grants.org

The school would expect to see evidence of applications to other sources of funding in addition to an application to the school itself.

Annex A. Bursary Application Form