

SEDBERGH SCHOOL

MEANS TESTED BURSARIES POLICY



GENERAL

The Governors of Sedbergh 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 and these may be awarded in the form of a percentage reduction on fees payable, depending on the financial, compassionate, or other pertinent circumstances of applicants.

Bursaries are subject to an annual review of parental means, and may be varied upwards or downwards, depending upon parental circumstances (eg 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 circumstances.

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 all the School fees.
- Existing pupils, where a change in parents/guardians' circumstances has resulted in difficulty in meeting School fees and may result in the child being withdrawn part way through a stage of education.

NEW APPLICATIONS TO THE SCHOOL

Awareness: 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 the School's fees is included in:

- The School prospectus
- The School website

THE APPLICATION PROCESS

Bursaries may be made available to parents/guardians of children entering the School. They are awarded at the discretion of the Governors, the Headmaster, and the Chief Operating Officer. The Director of Compliance & Planning is responsible for the management and coordination of the process.

Step One: Parents/guardians seeking a Bursary are required to complete and return a Sedbergh School Registration form with the appropriate fee and a Bursary Application form which seeks to establish the financial circumstances of the household. The form requests details of all income, capital and liabilities, and must be accompanied by full documentary evidence. The completed forms, together with the necessary documentary evidence, are to be submitted to the Director of Compliance & Planning for consideration in the first instance

who is likely to arrange a further discussion with the applicants. Incomplete forms will not be processed.

Step Two: The Director of Compliance & Planning, and if necessary, the Headmaster and Chief Operating Officer, assess all applications to establish the likely level of support which will be required in order to allow the child to attend Sedbergh School. This may involve, where deemed necessary and subject to resources being available, the Director of Compliance & Planning 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.

Step Three: The Headmaster, Chief Operating Officer and Bursar Director of Compliance & Planning have discretion to make awards on the delegated authority of the Governors.

Step Four: The Director of Compliance & Planning, where likely need is above certain limits, prepares a recommendation to the Headmaster and Chief Operating Officer based on an objective assessment of the application and in accordance with current guidelines.

Step Five: The parents/guardians are advised, usually within fourteen days, whether their child is to be offered a Bursary which should be accepted or otherwise within ten days by responding to the offer email.

Step Six: Parents/guardians of new pupils are then required to sign Sedbergh School's Acceptance Form, pay the appropriate deposit, agreeing to any conditions relating to the Bursary.

THE CASE FOR ASSISTANCE

The School will consider several 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 any support.

Suitability: In assessing the child's suitability, attention will be given to the academic or sporting assessment result of each applicant, but potential will also be considered as well as actual achievement. Bursary funds are limited to those judged by the Headmaster as likely to gain the most from the educational provision. Each pupil to whom support is offered must, in the opinion of the Headmaster, be likely to make sound academic progress following admission, 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 Sedbergh School. Each applicant should meet Sedbergh School's standard academic requirements and will be expected to make a positive contribution to the School. 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 such awards within the context of the overall operating budget. Bursaries are funded from both fee and endowed income and are carefully regulated, and

costs controlled closely. It is recognised that judgements about what sacrifices a family should make to pay School fees will be personal. Sedbergh School has a duty to ensure that all Bursary grants are thoroughly assessed and, as well as current earnings, other factors which will be considered in determining the necessary level of grant will include:

- 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 or other properties.
- 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 Bursary will consider all these outgoings, although they may not be considered as allowable expenses under the assessment process.

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 Sedbergh School
- Where 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 separation has resulted in the child having to be withdrawn from Sedbergh School adding to the stress of coping with the parents/guardians separating.

EXISTING PUPILS – CHANGE IN FAMILY CIRCUMSTANCES

Within the available budget funding, Sedbergh 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 cycle of Bursary application submission, scrutiny and award. This sum will be set within defined budgetary constraints. Parents/guardians with a child at Sedbergh School whose financial circumstances suddenly change may apply for a Bursary, explaining their situation. Such awards are subject to the availability of funding and cannot be guaranteed.

REVIEW OF AWARDS

All Bursary awards may be subject to repeat testing of parental means and may be varied upwards or downwards depending on the parental circumstances. Current Bursary holders will be issued with repeat means-testing forms as they fall due for return within fourteen days. For those previously in receipt of Bursaries, the Headmaster and Chief Operating Officer have the discretion to recommend to the Governors the reduction or withdrawal of an award not only where the pupil's progress, attitude or behaviour has been unsatisfactory, but also where the parents/guardians have failed to support Sedbergh School, for example by late payment of any contribution they are making to the School fees.

CONFIDENTIALITY

Sedbergh School respects the confidentiality of Bursary awards made to families; recipients and the benefited child are expected to do likewise.

OTHER SOURCES OF BURSARY ASSISTANCE

In addition to Sedbergh School's Bursary Fund, there are several educational and charitable trusts which provide assistance with school fees. In most 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. Sedbergh School encourages parent/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:

Director of Compliance & Planning
Sedbergh School
Malim Lodge
Sedbergh
LA10 5RY
tr@sedberghschool.org

The Educational Trusts Forum
www.educational-grants.org