



# BEESTON HALL SCHOOL

## Policy and Guidelines for Bursarial Help

### A. Introduction

Beeston Hall (the school) is committed to broadening access to the educational experience it provides by offering means-tested financial support to assist the payment of school fees to eligible parents/guardians. Such support is known as a **Bursary** which may have a value up to 50% of tuition and boarding fees, depending on the financial or other circumstances of applicants.

Applications for financial support usually fall into two categories:

- **Entry Bursaries:** available for new applicants to the School, where parents/guardians are unable to fund fully the fees. Limited funds are set aside for substantial (up to 100%) 'life-changing' awards. The focus of distribution is to those who are in the best position to contribute to and gain from a Beeston Hall education.

Beeston is proud of the broad base of entry it has and the value it is able to add to children's educational development. The school may identify potential through informal assessment (usually a 'taster day') and then make an award on the basis of the means-testing process following a completed **Declaration of Means** form. All awards depend on unanimous agreement of the Governors' bursary committee which meets three times a year.

- **Emergency Bursaries:** available for parents/guardians of existing pupils where a change in financial or personal circumstances has created a difficulty in paying the fees. In this case the School's **Whitaker Trust** can be applied to by parents or the School, on behalf of a child, to provide funds to allow the child to remain a pupil at the School until a 'natural break' point in his/her education is reached.

### Scholarships

The School holds annual scholarship entry days for children entering the prep school from primary schools (usually Year 7) in the following areas: academic, music, art, sport and all-rounder, which are worth fee remissions of between 5% and 15%. The scholarships are not connected to or dependent on means-tested financial support, but parents/guardians are invited to supplement the scholarship award up to a total of 50% of fee remission, subject to the Governors' bursary committee approving the application.

## **Awareness**

The School provides information to alert parents/guardians of potential pupils to the possibility of gaining means-tested financial support to assist payment of school fees in:

- The School prospectus
- The School website
- Other media – by means of advertisements

## **Extras**

Bursary awards apply to tuition and boarding fees only. Extras must be paid in accordance with the terms and conditions of Beeston Hall School and average £300 per year. Any extras above £100 to be incurred on behalf of a pupil in receipt of an award for a trip or event should be approved by the Headmaster or Bursar before a commitment is made.

## **B. The Application Process**

### **New Applicants to the School**

Entry Bursaries are in theory available to parents/guardians of children entering at any stage but most likely will be on entry to the prep school (in Year 3) or after primary school (in Year 7). The process is managed and coordinated by the Bursar on behalf of the Governors' Bursary Committee. Decisions on awards are communicated by the Bursar.

### **Suitability**

A capacity to respond to opportunities and contribute to school life academically and other ways (for example the fields of sport, art, drama or music) is likely to be the factor which attracts bursarial support, if families qualify. Pupils to whom support is offered must be likely, in the opinion of the Bursary Committee, to make sound academic progress following admission, and possess the potential to develop. Previous school reports will be consulted for evidence of achievement, potential and good behaviour.

### **Step One**

Parents/guardians seeking a bursary are required to complete an application form, ***Declaration of Means***, which seeks to establish the financial circumstances of the household. The form, which requests details of income, expenditure and capital, is to be accompanied by documentary evidence. The completed form, together with the necessary supporting documentary evidence, is submitted to the Bursar and committee in November, March and May each year.

## Step Two

Completed financial assessment forms are passed to the Bursar who assesses all applications in order to establish the likely level of support required for the child to attend the School. This process may involve the parents visiting the School for a meeting, or a School representative visiting the parents'/guardians' home, to ensure the information has been correctly interpreted and the basis of the financial assessment has been fair. The Bursary Committee prepares a recommendation which is considered with the Headmaster and then presented to the Bursaries Committee for approval.

## Step Three

Parents are advised whether or not their child is to be offered a bursary, subject to the child satisfying the admissions criteria of the School at the time. Parents are required to sign a letter accepting the offer which accepts the conditions relating to the bursary.

## Existing Pupils – Change in Family Circumstances

The **Whitaker Trust** has modest funds to support Emergency Bursaries, 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 an **Emergency Bursary** to the Bursar explaining their situation and using the standard application form. Such awards are subject to the availability of funding and cannot be guaranteed. Emergency Bursaries will also be awarded on a temporary basis and will not be guaranteed for the remainder of the pupil's education in Beeston Hall School.

## C. Criteria for Award

The Bursaries Committee considers a number of factors when assessing a Bursary request including the child's suitability for accessing a Beeston education. The Committee makes a judgement as to the justification for financial support and the extent of the support.

The size of the bursary award is not influenced by the level of the academic ability of the child but by the extent of the 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 earning, 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 saving and investments would be expected to be used for the payment of school fees, as would equity value in houses. Approved pension funds are not included within a parent's assets, however, non-approved pension saving will be taken into account in the award calculation.
- 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.
- 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 or land holdings beyond business assets.

### **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 (however, it is important to note that because one child is supported by the School it should not be assumed that subsequent siblings will be).
- Where the social needs of the child are relevant (e.g. 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.

### **D. Biannual Review**

Bursary awards are subject to an biannual assessment of parental means and the size of the Bursary may be varied upwards or downwards depending on any change in parental circumstances. The level of award is made with regard to the family's financial circumstances and is reviewed and revised biannually by the Bursar and Head to take into account any changes in fees, and may be varied upwards or downwards, depending on individual parental/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 considerations may affect the size of the awards in exceptional circumstances.

Current bursary holders will be issued with repeat means-testing forms at the beginning of March every two years for return by the end of the month. For those previously in receipt of bursaries, the Bursar, in making their recommendation to the Bursaries Committee, has the discretion to recommend to the Head 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.

## **E. General Information**

### **Confidentiality**

The School respects the confidentiality of bursary awards made to families and recipients are expected to do likewise. Any breach of this confidentiality may be deemed to be a breach of the conditions of the bursary award which may result in the withdrawal of the award.

### **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 in circumstances may be unable to remain. Beeston Hall 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 Education Trusts Forum *and also* The Joint Educational Trust

6 Lovat Lane

London EC3R 8DT

[www.educational-grants.org](http://www.educational-grants.org)

Telephone: 01932 865619

Email: [admin@jetcharity.org](mailto:admin@jetcharity.org)

Webstie: [www.jetcharity.org](http://www.jetcharity.org)

There is also the Guide to the Major Trusts, the Directory of Grant-Making Trusts and Charities Digest 2016.

[https://www.amazon.co.uk/gp/product/1906294682/ref=pd\\_lpo\\_sbs\\_dp\\_ss\\_2?pf\\_rd\\_p=479289247&pf\\_rd\\_s=lpo-top-stripe&pf\\_rd\\_t=201&pf\\_rd\\_i=1903991757&pf\\_rd\\_m=A3P5ROKL5A1OLE&pf\\_rd\\_r=19AP0T484SXR5KSKW4QK](https://www.amazon.co.uk/gp/product/1906294682/ref=pd_lpo_sbs_dp_ss_2?pf_rd_p=479289247&pf_rd_s=lpo-top-stripe&pf_rd_t=201&pf_rd_i=1903991757&pf_rd_m=A3P5ROKL5A1OLE&pf_rd_r=19AP0T484SXR5KSKW4QK)

<http://apps.charitycommission.gov.uk/Showcharity/RegisterOfCharities/registerhomepage.aspx>

## Appendix A

### Conditions of Bursary 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 beginning of term. Any extras above £100 to be incurred on behalf of the pupil in receipt of an award for a trip or event should be approved by the Bursar before a commitment is made.
3. **Withdrawal of the Award:** The Award may be withdrawn by written notice sent to a parent if, in the opinion of the Governors, acting in good faith, the pupil or a parent has not complied with the obligations set out in paragraphs 1 and 2 above or the pupil has fallen below the required standards of conduct and progress and in the further opinion of the Governors' there has been no significant improvement following consultation with a parent and/or the pupil and a written warning. Withdrawal of the Award will take effect from the start of the following payment term.

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. **Biannual Review:** Other than an Emergency Bursary when the period is likely to be shorter, an award is normally tenable throughout a pupil's time at the School. It is, however, subject to an biannual review of financial circumstances and should these change significantly from the present position, the Award may be varied or discontinued.
5. **Repayment events:** 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 payment terms benefits (if received) if the pupil has engaged in serious misconduct or has been expelled or removed for reasons of misconduct by the requirement of the Head acting in good faith;
  - b) up to three payment terms benefits (if received) in a case of the pupil being withdrawn for any reason during a school term with a Term's written notice having been given;
  - c) up to the benefits received for one School year if the parent has failed to inform the Bursar of any change in their financial circumstances within a reasonable time of such change occurring.

6. **Fees in lieu of notice:** For the avoidance of doubt, the benefits receivable under an Award will not apply to any payment term for which the School has required payment of fees in lieu of notice.
  
7. **Terms and Conditions:** These Conditions of Award take precedence over any of the School's Terms and Conditions which are inconsistent with them but in all other respects the Terms and Conditions as amended from time to time shall apply and these Conditions of Award shall be interpreted in accordance with them. Individuals may receive bursary support for a maximum of seven years.

## **Appendix B**

### **Acceptance Slip**

We accept the offer of the award of the Bursary, along with the conditions set out in the Conditions of Award which we have received.

Name of Child .....

Signature of Father / Guardian ..... Signature of Mother / Guardian.....

*Please note an acceptance slip will be sent out with any offer of bursary support and must be returned for the award to be finalised.*