



## Bursary Policy

Updated: 03-26  
Prepared by: NAP/SHCC/TZL

Next Review: 03-27  
Authorised by: Governors

### **This Policy applies throughout the School Introduction**

The School is a registered charity: it is committed to providing public benefit and is aware of its obligations under the Charities Act 2011. This Policy is reviewed on an annual basis to take into consideration the latest guidance from the Charity Commission and any other factors relevant to this Policy.

The Governors of the School are committed to broadening access to education at the School by offering eligible parents or guardians (referred to throughout this Policy as 'parents') means-tested financial support towards the payment of tuition fees. Such support is known as a bursary and bursaries may be awarded in the form of a discount of up to 100% on tuition fees payable, depending on the financial, compassionate or other pertinent circumstances of applicants. Additional activities, such as After School Care, clubs and individual music lessons, are not normally included in bursary awards but may be included at the discretion of the School, as may residential trips. Lunches and exercise books are included in the fees. The School has a large selection of second-hand uniform available to all pupils in return for an optional donation to charity, so there should be little or no uniform cost to recipients of assisted places.

While we are committed to broadening access to the education we offer beyond those who can afford full fees, the amount of support and the number of bursaries we can sustain is necessarily limited within the constraints of running the school in a financially responsible way.

Bursary awards will be subject to annual repeat testing of parental means and may be varied upwards or downwards. Bursary awards are made based on full disclosure of a family's financial information, including that of both parents, if separated or divorced, and contributions from other sources, e.g., grandparents, provided to an external agency which recommends award levels in relation to a family's financial circumstances, including income, both earned and unearned, investments and savings. Assets and property holdings are also included. Furthermore, the agency benchmarks levels of expenditure to provide a recommendation as to whether additional economies may be possible. Awards are generally informed by this recommendation, and may be varied upwards or downwards depending on individual circumstances (e.g., size of family, any other persons dependent upon them and like factors), compassionate or other pertinent considerations. Bursary award decisions are made by The Cavendish School's Governors; the decision whether to offer financial support, and the amount (if any) remains at their absolute discretion and they and the School are not obliged to enter into any discussion about how the decision was reached. While families may apply for bursary support, it does not follow that their application will be successful, irrespective of their financial need.

Notwithstanding repeat testing, it is the parents' responsibility to inform the School of any change in their financial circumstances.

The School asks families to indicate their need for a bursary at the start of the admissions process. However, the bursary application process does not start until an offer of a place is made. For pupils wishing to enter Year 1 and above, this would not be until after a taster day had been arranged and attended. Appointment of a third-party financial assessor is made at the School's cost after the offer

of a place has been made. Once the bursary assessment process has concluded and an agreement reached regarding the level of fees, the offer would be accepted via the payment of a deposit.

### **Public information**

Information advising the parents of potential pupils to the possibility of gaining means-tested financial support with the payment of the School's fees is prominently included on the School's website.

### **The application process**

Bursaries for new applicants are typically considered for parents of pupils entering the School as Occasional Vacancies, i.e. outside of our main intake in Nursery and Reception, to fill vacancies that have arisen in Years 1-6. (In other words, usually where there is likely to be no fee-paying applicant for an available place.) They are awarded at the discretion of the Governors; the Bursar is responsible for the management and coordination of the process.

As with all OV applications, the admissions process typically includes a taster day to establish fit in the school with the proposed class. If this cannot be arranged (e.g., the child is not in London), the School arranges for a senior member of the teaching staff/Head/Deputy Head (Pastoral) to meet the child online, with prior permission from her parents, for a short conversation.

Following the taster day, the family would be informed if the School were willing to make an offer. In the case of a bursary application, if the parents indicate their continued interest in their child joining the School, the external bursary assessment company is asked to conduct a financial review of the family.

In rare circumstances, if the bursary application comes from a prospective pupil entering at the ages of 3+ or 4+ because of ready availability in a small cohort, or for other unusual circumstances, we reserve the right to meet the child before making an offer of a place, although this would not normally be required for a child of that age.

- **Step one:** parents seeking a bursary are required to undergo a financial review with an external agency, which seeks to establish the financial circumstances of the household(s). Details of income and capital, including property, will be sought and must be accompanied by full documentary evidence. A representative from the external agency will hold a virtual meeting with the parents to ensure the information has been correctly interpreted and the basis of the financial assessment has been fair in order to provide a confidential report to the School. The report contains a recommendation as to the appropriate discount which will be required to allow the potential pupil to attend the School. (Note: the School meets the cost of this external agency.)
- **Step two:** the Bursar uses the report to prepare a recommendation as to the appropriate level of bursary discount and any other support. In rare cases, this may also include accommodation being made for the individual needs of the child, such as additional one-to-one staff support, and whether the child's local authority may meet this cost. In some cases, irrespective of the finances of the applicant's family, the school may decide not to offer support.
- **Step three:** the recommendation is presented to the Governors for approval, subject to potential amendment.
- **Step four:** the parents are advised of the proposed bursary award, if any.

- **Step five:** should the level of bursary support offered be acceptable to the parents, as with all offers, the School would ask the family to secure their place by signing our terms and conditions, providing proof of identity for the child, and paying a deposit. (The amount of deposit in the case of a bursary application may be reduced according to circumstances, at the discretion of the School).

### The case for assistance

A number of factors will be considered when making the judgment as to the justification for support and the extent of such support. Bursary places are limited and those given priority will be those we consider are likely to gain the most from our educational provision. Each pupil to whom support is offered must, in the opinion of the Head, be likely to make good academic progress following admission and possess the potential to develop the quality of her work and benefit from participation in the wider, extra-curricular activities on offer at the school.

- **Suitability:** in assessing a potential pupil's suitability, prime attention will be given to the School's ability to accommodate any special educational and/or welfare needs of the potential pupil and her contribution to the composition of the year group. It is of paramount importance that the School is capable of meeting the needs of the potential pupil as well as balancing these with the needs of her peers, i.e. the class having staff capacity.
- **Financial limitations:** the amount of the bursary award is influenced not by the child's academic ability 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 in 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 awards are well focused 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 property
  - In cases of parents who are divorced or separated, the contribution that is being made or could be made by both parents, regardless of who the child lives with, and based on the principle that liability for the fees is joint and several. This means that the school may consider the financial circumstances of each parent separately and together, treating each parent's household separately
  - Contribution to household costs by other, wider, family members, any adults unrelated to the potential pupil or by outside sources
  - Where fees are being paid to other schools (or universities), the bursary offered will take into account all of 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. It should be noted that the list is not comprehensive:
    - frequent or expensive holidays
    - new or luxury cars

- investment in significant home improvements
  - a second property/land holdings
  - failure to honour school fee payments to other schools
  - an apparent lack of transparency in financial disclosure
  - any lack of cooperation during the bursary assessment process
- **Other factors:** it is recognised that there may be other circumstances which should be considered. These include:
    - Where a potential pupil has one or more siblings at the School (though a bursary award to one child does not guarantee an award to a sibling)
    - Where the social needs of the potential pupil are relevant (e.g. may be suffering from bullying at their present school)
    - Where a parent is critically or terminally ill or is unable to secure permanent employment due to poor health or incapacity
    - Where a separation has resulted or is likely to result in the child having to be withdrawn from the school, adding to the stress of coping with the parents separating, although the school will nonetheless consider the financial circumstances of both parents in such cases
    - Where a previous school has awarded bursary support (but please note that bursary support from a previous school is no indication or guarantee that the parents would be eligible for bursary support at our School)
    - Where applicants have undermined the trust necessary for a good relationship between school and family, we would not make any offer of assistance and would retract our offer

In situations where 100% or a high % of bursary funding is being sought for a new pupil to the School, Governors would need to be satisfied of the existence of exceptional circumstances. The higher the % bursary sought, the more exceptional the circumstances will need to be demonstrated.

### **Annual review**

All bursary awards will be 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 at the end of the spring term each year for return by the start of the summer term. For those previously in receipt of bursaries, the Bursar has the discretion to recommend to the Governors the reduction or withdrawal of an award not only where financial circumstances suggest it, but also where the Head believes a pupil's progress, attitude or behaviour has been unsatisfactory, or where the parents have failed to support the School, for example by the late payment of any contribution they are making to the fees.

Should any information disclosed in response to the annual review become inaccurate at a later date, the School must be informed without delay. Failure to divulge a change in circumstances could lead to a bursary being withdrawn or withheld.

### **Senior school registration fees**

At the Head's discretion, assistance may be available with the registration fees for prospective senior schools. Parents are encouraged to discuss this with the Head in advance of senior school registration deadlines. The Head may also be able to provide guidance on secondary school bursary support where required. Guidance should be sought in good time and at least by the start of Year 5.

## **Other disbursements**

Also, at the Head's discretion, assistance may be available with costs for residential visits and, should they be needed, specialist assessments and therapeutic services. The objective is to ensure our bursary pupils have access to the professional services that allow them to best access the School's educational provision.

## **Confidentiality**

The School respects the confidentiality of families to whom bursary awards are made and recipients are expected to do likewise. The exception would be if it was felt that an awareness of a pupil's bursary status would be in the child's best interests and on a "need to know" basis.

## **Data protection**

Bursary applications are processed on behalf of the School (the data controller) by an external agency (the data processor) in accordance with data protection legislation<sup>1</sup>. The external agency has provided the School with its Data Protection Policy. A copy of the external agency's Data Protection Notice for applicants is provided to parents with the bursary application form(s). Parents should be aware that the Information Commissioner's Office has advised that the report produced by the external agency for the School is exempt from Subject Access Request provisions.

## **Linked policies**

- Admissions Policy
- Hardship Policy

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<sup>1</sup> **"Data Protection Legislation"** means any data protection legislation from time to time in force in the UK including the Data Protection Act 2018 and the UK General Data Protection Regulation (or any successor legislation).