

## **WOODBIDGE SCHOOL BURSARY POLICY**

### **I. General**

- I.1 The Governors are committed to maintaining the breadth of access to Woodbridge School by offering to eligible parents/guardians means-tested financial support for the payment of school fees. Any award is dependent upon academic performance and financial need. Such support is known as a Bursary which is awarded in the form of a discount. A reduction of the tuition fees payable can be awarded depending on the financial, compassionate or other pertinent circumstances of applicants. In a few rare cases an amount may also be awarded to cover 100% of the tuition fees (adjusted for the cost of lunch), extras and uniform. In certain circumstances free school lunches may also be available.
- I.2 Bursaries are normally available to pupils joining Woodbridge School Prep in Year 3 and at Years 7, 9 and 12 at the Senior School.
- I.3 The demand for bursaries is high and not all applications can be funded. The criteria for making awards are detailed below.
- I.4 Bursary awards are subject to an annual assessment of parental (and where applicable their partners where the parents are separated or divorced) means and may be varied upwards or downwards, depending on financial circumstances. Awards are made on the basis of the confidential scale of awards which sets out award levels in relation to a family's or household's financial circumstances. The scale of awards is reviewed and revised to reflect any changes in fee costs. Though awards are generally tied to this scale, they may be varied upwards or downwards depending on individual parents'/guardians' circumstances (e.g. their savings, investments, and realisable assets, as well as their income, family size, marital status, dependents and similar factors), equity in houses, compassionate or other pertinent considerations.
- I.5 Bursary awards are normally available for pupils entering Years 3, 7, 9 and 12. Those awarded in Year 3 at Woodbridge School Prep usually are up to a maximum of 50%. Entry at Woodbridge School Prep is academically selective and a bursary award is subject to a pupil's performance in Woodbridge School Prep's assessment process. Once awarded, it is expected the bursary will continue through until the end of Year 11 however, this is subject to the pupil's performance in the Senior School Year 7 entrance assessments, continued academic progress throughout the pupil's duration at School as well as the continued financial need (please see point 4.1). Bursary levels at Year 7 may be greater than 50% in value but this is dependent on the pupil's academic performance in the Senior School entrance assessments. Year 7 or 9 bursaries are initially awarded to the end of Year 11 (subject to points 1.6 and 4.1).
- I.6 A Bursary award is subject to the pupil achieving benchmarks of progress agreed between the family and the School. These are also reviewed annually. Those pupils who hold a bursary in Year 11 will be expected to achieve the required standard to enter the Sixth Form and any additional benchmark set at the previous annual review to maintain their bursary award. Although the process is not automatic if the agreed standard is met, it is usual that the award will continue.
- I.7 Bursaries are offered only to families who are resident in the UK.

1.8 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'/guardians' circumstances has resulted in difficulty in meeting tuition fees and may result in the child being withdrawn at key points in their education.

## 2. The Application Process

2.1 Bursaries may be made available to parents/guardians of children entering Years 3, 7, 9 and 12 of Woodbridge School, as well as other Year Groups in exceptional circumstances. The School contracts Bursary Administration Ltd to undertake the assessment process, which includes making home visits.

- Step One both parents/guardian(s) seeking a bursary are required to complete an application form which seeks to establish the financial circumstances of the household. In the case of separated or divorced parents each must complete a form, including any partner the parent lives with in the same 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 form, together with the necessary documentary evidence, is to be submitted to Bursary Administration Ltd no later than the end of the Michaelmas term in any year for bursaries to start the following September. Late applications may be considered if there is a good reason (e.g. families moving unexpectedly into the area). Failure to return completed forms sent out in good time by the deadline will not be deemed as a good reason for a late application.
- Step Two all applications are assessed in order to establish the likely level of support which will be required in order to allow the child to attend the School. This will involve a representative from Bursary Administration Ltd 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 parents/guardians are advised whether their child is to be offered a place at the School and of any bursary offer with associated school-based performance benchmarks. For the sake of clarity a place may be offered but not accompanied by the offer of a bursary. This may be as a result of the financial calculations concerning the parents' or guardians' ability to pay or that the child has not achieved the required academic standard to merit the award of a bursary. In some cases the application for a bursary may be placed on a waiting list in the event that those who have been offered a bursary do not accept their place.
- Step Four parents/guardians are then required to sign a letter accepting the place at the School and an acknowledgement agreeing to any conditions relating to the bursary, by the first Monday in March. The offer of a bursary will lapse if such acceptance has not been received by the acceptance deadline. The funds may then be allocated to the next person on the waiting list.

2.2 In advance of the beginning of the academic year all parents/guardians in receipt of a bursary are required to complete the annual return (Annex A) and may receive a home visit. Although for new entrants this may seem like a repeat of the process in step one above, this is a requirement. If parents'/guardians' circumstances have changed this may be reflected in a change to the amount of the award.

2.3 Failure to complete and submit this form by 21 August will result in the withdrawal of the bursary.

### 3. The Case for Assistance

3.1 The Woodbridge School Head and Bursar will consider a number of factors when making the judgement as to the justification for support, and the extent of such support: however applicants need to meet the financial criteria below in order to be considered for an award. The final decision lies with the Woodbridge School Head as to whether to award a bursary, and the amount.

#### Financial criteria

3.2 The amount of the bursary award is influenced by the extent of financial 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 its overall budget. Applicants will need to supply any evidence of information disclosed to Bursary Administration Ltd. The following are examples, but not an exhaustive list of what might be requested: bank and building society statements, mortgage statements, tax returns, salary slips, valuations, company accounts, loan statements, benefit statements, educational expenses, credit card statements, pension funds.

3.3 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 bursaries are well focussed and to do this the factors which will be considered in determining the necessary level of award will include:

- i. Annual income of the family from all sources.
- ii. 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.
- iii. 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 including the family home.
- iv. In cases of separation, the contribution made by the absent parent including the relevance of any court order, and the financial circumstances of any new partner.
- v. Contribution to household costs or school fees by other parties from other, wider, family members, any adults unrelated to the child, or from outside sources such as trusts.

Where fees are being paid to other schools and universities, the School's award will take into account all these outgoings.

3.4 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 and/or expensive leisure activities, including holidays.
- New or luxury cars.
- Investment in significant home improvements.
- A second property/land holdings/investment portfolio.
- High discretionary expenditure.

#### Selection criteria

3.5 Bursary awards are highly competitive and as such not all eligible pupils will be awarded a bursary. If the financial criteria above have been met following the financial assessment process, then those pupils judged most suitable will be given priority as those likely to gain most from the educational provision, in accordance with the following criteria:

- Excellent performance in the appropriate entrance examination.
- Potential to benefit from the key strengths of the School in music; sport; drama.
- Need to benefit from the School's exceptional pastoral care.

#### Other factors

3.6 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.
- 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.

#### Existing pupils – change in family circumstances

3.7 Within overall budget funding, the School will in normal circumstances set aside each year a hardship fund, for existing pupils where a change in parents'/guardians' circumstances has resulted in difficulty in meeting tuition fees and may result in the child being withdrawn at key points in their education. These can be applied for outside 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 a bursary, explaining their situation and using the form at Annex A. Such awards are subject to the availability of funding and cannot be guaranteed.

## **4. Annual Review**

4.1 All bursary awards are subject to an annual assessment of parental financial means and may be varied upwards or downwards depending on the outcome of the assessment. Current bursary holders will be issued with repeat financial assessment forms and may receive a home visit. The School has the discretion to recommend the reduction or withdrawal of a bursary not only where financial circumstances have improved but also where following a review a pupil's progress, attitude or behaviour has been unsatisfactory. Failure to complete the forms for the annual review by the 21 August will result in the bursary being withdrawn.

## 5. Confidentiality and Data Processing

- 5.1 The School respects the confidentiality of bursary awards made to families and recipients are expected to do likewise. The School may inform tutors and housemasters/mistresses if a pupil is a bursary holder but will not pass on any of the financial circumstances giving rise to the award.

The information gathered by Bursary Administration Ltd for the purpose of calculating the bursary is used for decision making concerning the remission of fees and other expenses only and is held in accordance with the Data Protection Act.

Author(s):	Bursar
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