



## Bursary Policy

(Whole School Including EYFS)

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<b>Responsible:</b>	Director of Finance		

## **1. INTRODUCTION**

- a. The Governors of Orley Farm School Trust are committed to broadening access to the school by offering to eligible parents/guardians means-tested financial support with the payment of schools fees and the initial purchase of the uniform items marked with an asterisk on the school's published Uniform List<sup>1</sup>. Such support is known as a Bursary and these 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.
- b. Bursary awards are subject to repeat testing of parental means each year. The award of a bursary is reviewed and revised annually to reflect any changes in personal circumstances and approved by the Governors. Bursaries may be varied upwards or downwards depending on individual parent's/guardians' circumstances (e.g. their savings, investments and realisable assets, as well as their income, the size of their family, any other person's dependent upon them and like factors), compassionate or other pertinent considerations.
- c. Requests for financial support usually fall into two categories:
  - I. New pupils in to the school, where a place has been offered but parents/guardians are unable to fund the tuition fees and
  - II. 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parents'/guardians' circumstances has resulted in difficulty in meeting tuition fees and may result in the child being withdrawn part way through a stage of education.

## **2. NEW APPLICANTS TO THE SCHOOL**

- a. 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 school fees is included in the school prospectus and school website.

## **3. EXISTING PUPILS – CHANGE IN FAMILY CIRCUMSTANCES**

Within overall bursarial funding, the School will in normal circumstances set aside each year a Fund, for cases of sudden, unforeseen need or where applications meriting bursary assistance are received out of the normal calendar cycle. This sum will be set within budgetary constraints. Parents/guardians with a child at the School whose financial circumstances suddenly change may apply to the Director of Finance for a bursary, explaining their situation and completing a Statement of Financial Circumstances form for a Bursary. Such awards will follow the process outlined in para 4.

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<sup>1</sup> Only when purchased from Billings and Edmunds in Harrow on the Hill.

## THE APPLICATION PROCESS

Bursaries may be made available to parents/guardians of children entering any year group of Orley Farm School. They are awarded at the discretion of the Governors after a place has been offered and the Director of Finance is responsible for the confidential management and coordination of the process.

**a. Step One**

Parents/guardians seeking a bursary are required to meet or have a conversation with the Director of Finance who will discuss the individual's request for bursarial assistance, outline the process and provide a Statement of Financial Circumstances form to establish the financial circumstances of the household. The form requests details of income and capital and completed forms, together with the necessary documentary evidence, are to be submitted in confidence to the Director of Finance via their P.A.

**b. Step Two**

The Director of Finance assesses 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. The school reserve the right to use a professional bursary assessment company, (currently the Bursary Administration Limited) to assist in the assessment of a bursary. This may involve an independent assessor visiting the parents/guardians' home to ensure the information has been correctly interpreted and the basis of the financial assessment has been fair.

**c. Step Three**

The Director of Finance will prepare a recommendation for the Chair of the Finance and General Purposes Committee (Finance) which will include the report from the Bursary Administration Company. After consideration by the Governors, a recommendation will be reached.

**d. Step Four**

The parents/guardians are advised in writing whether their child is to be offered financial support towards a place at Orley Farm School.

## 4. THE CASE FOR ASSISTANCE

The Governors 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.

**a. 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 most likely to gain 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 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. In normal circumstances, each applicant should meet the School's normal academic requirements. Previous school reports may be consulted for evidence of good behaviour.

**b. 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 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, the School has a duty to ensure that all bursary grants 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:

- I. 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;
- II. 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);
- III. In cases of separation, the contribution made by the absent parent;
- IV. Contribution to household costs by other, wider, family members, any adults unrelated to the child or by outside sources;
- V. Where fees are being paid to other schools (or universities) the School's grant will take into account all these outgoings; and
- VI. Acknowledging that others might have a different view, the School considers that the following would not be consistent with the receipt of a bursary:
  - 1) Frequent or expensive holidays.
  - 2) New or luxury cars.
  - 3) Investment in significant home improvements.
  - 4) A second property/land holdings.

**c. 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:

- I. Where a child has siblings at Orley Farm School;
- II. Where the social needs of the child are relevant (may be suffering from bullying at their present school);
- III. Where a parent/guardian is terminally ill or is unable to secure permanent employment due to poor health; and
- IV. 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.

**5. ANNUAL REVIEW**

All bursary awards are 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, usually in the Spring Term of each academic year. For those previously in receipt of bursaries, the Governors have the discretion to recommend 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.

**6. SCHOOL TRIPS**

The school encourages all pupils to benefit from the extra-curricular activities which take place. However, it would not be considered appropriate for a pupil to go on an optional expensive school trip, mostly overseas trips, if they are in receipt of a bursary. Note this does not include 'Exped Week'.

## **7. CONFIDENTIALITY**

The School respects the confidentiality of bursary awards made to families and recipients are expected to do likewise.

## **8. 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 of circumstances may be unable to remain. Orley Farm 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 Director of Finance.