



Bursary and Hardship Awards Policy

(Whole School Including EYFS)

First Issued:	2007	Next review:	Spring Term 2027
Last Reviewed:	Spring Term 2025	Version:	6.0
Responsible:	Director of Finance		

1. INTRODUCTION

- 1.1 The Governors of Orley Farm School Trust are committed to broadening access to the school by offering eligible parents/guardians means-tested financial support with the payment of school fees and the initial purchase of the uniform items marked with an asterisk on the school's published Uniform List¹. Such support is known as a Bursary and this 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.
- 1.2 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 is subject to approval by the Governors.
- 1.3 Bursaries 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, the size of their family, any other persons dependent upon them and like factors), compassionate or other pertinent considerations.
- 1.4 Funding available for the award of bursaries by the School is strictly limited and cannot be guaranteed for any new applications at any stage. Subject to repeat testing, a degree of priority will be given to the renewal of awards to existing recipients rather than to new applicants.
- 1.5 A bursary may be withdrawn in its entirety in accordance with the terms upon which such an award is made or otherwise in accordance with the school's Terms and Conditions. A bursary may also be withdrawn in its entirety if, in the opinion of the Head, the child's attendance, progress and/or behaviour (and/or either or both of the parents' behaviour or conduct) no longer merit the continuation of the award.
- 1.6 Bursary and Hardship Award 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 school fees is included in the school website.

2. CATEGORIES OF AWARD

Requests for financial support usually fall into two categories:

2.1 Bursary Awards

- 2.1.1 Bursary awards are made to pupils new to the school, where a place has been offered but parents/guardians are unable to fund the tuition fees and other educational expenses.
- 2.1.2 Due to the pressure on bursary funding, families who made unsuccessful bursary applications at the point of entrance are not eligible for hardship bursary support until two years after their child's admission to Orley Farm School. We recommend that all families ensure that they can meet the financial cost of independent education before they commit to send their child to Orley Farm School.

2.2 Hardship Awards

- 2.2.1 Existing pupils where a change in parents'/guardians' circumstances has resulted in short term difficulty in meeting tuition fees and other educational expenses and may result in the child being withdrawn part way through a stage of their education.
- 2.2.2 Within overall bursarial funding, the School will in normal circumstances set aside each year a Hardship Fund, for cases of sudden, unforeseen need or where applications meriting bursary

¹ Only when purchased from the School's nominated uniform supplier.

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 hardship award, explaining their situation and completing a Bursary Application Form. Such awards will follow the process outlined in paragraph 4 and are subject to availability of funding and cannot be guaranteed.

2.2.3 Hardship awards are reviewed periodically and generally granted up to a maximum of one school year's fees during the course of the pupil's education. Families who remain unable to support the ongoing fees at the end of the hardship period will need to consider alternative arrangements for education and give the requisite full term's notice to the School in order to avoid payment of fees in lieu.

2.2.4 There may be temporary arrangements dealing with the disbursement of "hardship" funds when local or national economic circumstances affect the income of school families.

3. THE APPLICATION PROCESS

3.1 The application process for both Bursary or Hardship Awards will follow the same process, as detailed in the steps below.

3.2 Bursaries may be made available to parents/guardians of children entering any year group of Orley Farm School although awards for entry into the Pre Prep section (Reception, Y1 and Y2) will normally only be made under exceptional circumstances. 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 so the Director of Finance can better understand the family's circumstances, including their financial position and ability to pay school fees. The Director of Finance will also outline the process for bursary applications, if appropriate, and in such cases, the parents/guardians will be sent an email with instructions on how to commence an application on the Online Bursary Portal.

b. Step Two

Parents/guardians are required to complete and submit a Statement of Financial Circumstances on the Online Bursary Portal, which requests details of income and capital, and then upload supporting financial documentation by the required deadline.

Please note both parents seeking a bursary are required to complete the process outlined above which seeks to establish the identity and financial circumstances of the family and of each parent. Where parents are separated and/or divorced, financial information from both parents should still be provided, as should the financial information of any other adults in the same household of either of the parent.

c. Step Three

The School reserve the right to use a professional independent bursary assessment company, (currently the Bursary Administration Limited) to assist in the assessment of a bursary. In which case, the completed Bursary Application Form and supplementary financial documents provided will be shared with the school's independent assessor. This assessment process will involve an independent assessor visiting the parents'/guardians' home or holding a telephone/virtual interview to ensure the information has been correctly interpreted and the basis of the financial assessment has been fair. Parents may also be asked to meet the Director of Finance or their nominee at the school and/or provide additional supporting information as may be requested.

d. Step Four

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 Director of Finance will prepare a recommendation for the Chair of the Finance Committee, on behalf of the Governors, which will include the report from the Bursary Administration Company, if used. Please note the report provided by Bursary Administration Company is used as a guideline only to form the school's recommendation to the Governors. After their consideration, a decision will be reached and parents/guardians are advised in writing whether their child is to be offered financial support towards a place at Orley Farm School.

e. Step Five

Both parents are then required to confirm acceptance of the bursary or hardship award in writing and acknowledging agreement to any terms and conditions relating to the award.

4. THE CASE FOR ASSISTANCE

4.1 The Headmaster and the Director of Finance will consider a number of factors when making the judgement as to the justification for support, and the extent of such support; inevitably this is a holistic judgment. 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 and the child's potential. Bursarial 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 the pupil's attainment, progress and 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 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 (but are not limited to):

- 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 property assets;
- III. 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.
- 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:
 - Significant capital savings and investments
 - Significant equity values in a second property or multiple properties and/or land holdings
 - Frequent or expensive holidays
 - New or luxury cars
 - Investment in significant home improvements
 - Failure to honour school fee payments to other schools
 - Siblings at other independent schools
 - Excessive pension contributions or capital overpayments on mortgages.

c. Other Factors

It is recognised that, in addition to academic ability and financial constraints, there may be other circumstances which should be considered as part of the School's holistic judgement. These include:

- Where a child has 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 child are relevant (for example, where a child is 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 (however, please note that bursary support from a previous school is no indication or guarantee that the parents would be eligible for bursary support at Orley Farm School).

5. ANNUAL REVIEW

- 5.1 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 beginning of the Spring Term of each academic year. Bursary holders will usually be advised of the outcome of the annual review by the end of March.
- 5.2 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 or by otherwise not acting in accordance with the school's Terms and Conditions, or otherwise in accordance with the terms of the award or the school's Terms and Conditions.

6. SCHOOL TRIPS

- 6.1 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

- 7.1 The School respects the confidentiality of bursary awards made to families and recipients are expected to do likewise.
- 7.2 All personal data processed in connection with the school's arrangements for bursaries shall be processed in accordance with the school's Privacy Notice which is available on the school's website and is otherwise available from the school upon request.

8. OTHER SOURCES OF BURSARY ASSISTANCE

- 8.1 In addition to the School's bursary funds, there are a number of educational and charitable trusts which provide assistance with tuition fees although the majority of these only seek to provide assistance to children at senior schools. These do therefore cover Years 7 and 8. 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.
- 8.2 Further information on how to pursue such assistance may be obtained via the website of the Educational Trusts' Forum at <http://educational-grants.org> which maintains a list of charities who may be able to assist and the Royal National Children's Springboard Foundation at: <https://www.royalspringboard.org.uk/>.