



BURSARY ASSISTANCE SCHEME POLICY AND PROCEDURE For Academic Year 2017-18

1. Introduction

At Kellett School we aim to provide “a love of learning and confidence for life” for each of our students, by providing challenge, offering opportunities and giving responsibility.

This is underpinned by our commitment to:

- Achieve academic excellence within a broad curriculum and with valuable extra-curricular experiences;
- Develop confident, articulate and well-rounded students who have a wide range of transferable skills;
- Provide a stimulating and supportive learning environment;
- Build foundations for students to understand their responsibilities as members of the global community.

To achieve these aims Kellett is committed to providing the best possible care and education to its students and to safeguarding and promoting the welfare of children and young people. To this end Kellett is committed to broadening access to the school by offering to eligible parents/guardians financial support with payment of school fees. Such support is known as a Bursary and may be awarded in the form of an allowance of up to 100% on school fees payable, depending on the financial, compassionate or other pertinent circumstances of applicants.

This policy has been authorised by the Governors of the Kellett School Association Limited. Its status is advisory only. It is addressed to prospective and current parents and students and to all members of the teaching and administrative staff.

2. Bursary Awards

2.1 Aims of Kellett School Bursary Award Policy.

The aims of the Kellett School bursary policy are as follows:

- to ensure compliance with the School’s Service Agreement;
- to admit children who will benefit from an academic education and who will contribute to and benefit from the ethos and activities of our school community. Kellett School will only admit a child who has met the academic criteria in accordance with the School Admission Policy;
- to offer children of parents/guardians eligible for means-tested financial support as a consequence of financial, compassionate or other pertinent circumstances, the opportunity to benefit from a Kellett

School education by the provision of bursarial support;

- to broaden access to children of the highest education calibre to benefit from a Kellett School education;
- to ensure that all applicant families for bursarial support are considered equitably and consistently;
- to ensure that no applicant family for bursarial support is treated unfairly on any grounds including race, colour, ethnic or national origin, religion or religious belief, sex or sexual orientation, marital status, disability or age.

2.2 Scale of Awards and Annual Review.

Bursary awards are subject to an evaluation and review by the Principal and Director of Finance & Operations (DFO) of the parental financial circumstances each year and may be varied upwards or downwards, depending on individual parents/guardians' circumstances (e.g. their savings, investments, assets and liabilities, as well as their income, size of their family, any other persons dependent upon them and like factors), compassionate or other pertinent considerations. The annual review will also take into account any changes in fee costs.

2.3 Categories of requests for Bursary Award.

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 school fees fully.
- Existing students where a sudden, unforeseen change in parents/guardians' circumstances has resulted in significant difficulty in meeting tuition fees with the result that the child is likely to be withdrawn part way through a stage of education.

3 New Applicants to the School

3.1 Awareness.

Information provided by the School alerting the parents/guardians of potential students to the possibility of gaining means-tested financial support with the payment of school fees is included in:

- The School prospectus
- The School website and may be promoted through local and other press by means of advertisements.

The Bursary Policy will be provided to parents on written request to the Principal of the School.

3.2 The Application Process.

Bursaries are awarded at the discretion of the Governors. The Principal and the DFO are responsible for the management and coordination of the process. A bursary is awarded to a student whose parents are unable, for financial reasons, to enroll their son or daughter at Kellett School.

The following criteria are considered in making this award:

- The student should be a member of a family in which there is a definite need of financial assistance.
- The student should be of good character, be conscientious in his/her studies and their level of achievement should be sound.
- In the first instance the award will be tenable for up to two years, the renewal for the second year and subsequent year periods will be subject to satisfactory reports to the Principal on the student's work, contribution to the School and continuing compliance with the conditions of the award.

As the bursary is intended only for boys and girls, whose parents are unable, for financial reasons, to enroll their son or daughter at Kellett School, it is necessary for details of the parents' financial position to be supplied. The Principal will treat this information as confidential.

3.2.1 Step One: Statement of Financial Circumstances (Confidential)

Parents/guardians seeking a bursary are required to complete a 'Statement of Financial Circumstances' form (the 'Form') in support of an application for a Grant. The School needs this information so that it may assess those families with the greatest financial needs and consult with parents about the financial commitment which the family can reasonably make to cater adequately for the child's needs both during the admission process and if an offer of a place is made.

The Form, which requests details of income, outgoings, assets and liabilities, will be provided on written request to the Principal or DFO. Documentary evidence must also be included, which may be photocopies of salary statements, bank records, dividend/bond statements, tax statements, etc. Incomplete Forms will be returned and not considered until completed in full. The initial determination of qualification for a bursary will be dependent on the financial circumstances of the applicant.

The Form must be accompanied by a completed Application Form for admission and entry to the relevant School/s for each child for whom the family is seeking bursarial support together with payment of the non-returnable registration fee in accordance with the School's Admission Policy. The application fee does not apply.

The completed Form(s), together with the necessary documentary evidence, is to be submitted to the Principal's PA no later than **1st January** in the year for the bursaries to start in the September of that year. In exceptional circumstances and with the written agreement of the Principal or the DFO the Form with documentation may be submitted after the closing date for a bursary to start in September of the same year. Late applications will be considered in accordance with the procedure described in this Policy and will be subject to the School's ability to fund these within the context of the School's overall budget.

3.2.2 Step Two. Assessment of Suitability, Interview and Recommendation.

The Principal and the DFO assess all applications in order to establish the likely level of support that will be required in order to allow the child to attend the School. The Principal and DFO will consider a number of factors when making the judgment as to the justification for financial support, and the extent of such financial support. In the main, the child's suitability for the school is the first consideration in granting support.

Each child for whom a bursary application has been made will be assessed for suitability for entry to the School in accordance with the School's Admission Policy and Procedures. In assessing a child's suitability for an award, 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 those likely to gain most from Kellett's educational provision. Each pupil to whom support is offered must, in the opinion of the Principal, 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 for financial support should meet the school's normal academic requirements. The confidential reference received from the child's Head teacher and previous school reports will be consulted for evidence of good behaviour.

It is recognised that, in addition to academic ability, the potential to contribute to and benefit from the ethos and activities of the school and financial constraints, there may be other circumstances which could be considered, these might include:

- Where a child has siblings at the School.
- Where the social needs of the child are relevant.

An applicant family considered by the School to be a potential candidate for a bursary award may be invited to attend an Interview (the 'Interview') with the Principal and/or the DFO at which time their bursary application will be discussed in more detail. This may involve the DFO, or his representative, visiting the parents/guardians' home to ensure the information has been correctly presented and interpreted and that the basis of the financial assessment is fair.

The Principal and the DFO prepare a joint recommendation to the Governors for a bursary award. Normally the Chair of the Board and/or Chair of the School Finance Committee will review the joint recommendations for bursary awards presented by the Principal and DFO and make recommendations for approval to the Board of Governors. Bursaries are awarded at the discretion of the Governors.

The School will not consider an application for a bursary unless the child for whom the family is seeking bursarial assistance is registered for admission and entry to the School.

3.2.3 Step Three. The Admission Process determination.

The School will assess each child registered for entry to the School in accordance with the School's Admission Policy and procedures to determine whether the child has been successful in meeting the School's entry criteria.

3.2.4 Step Four. Offer of a Place and Bursary Award.

The parents/guardians are advised whether their child is to be offered a place at the School and of the Bursary offer, if any.

An offer of a bursary is conditional on the offer of a place at Kellett which is subject to the successful completion of the Admission Procedures which are set out in the School's Admission Policy.

3.2.5 Step Five. Acceptance of a Place and Bursary Award.

Parents/guardians are then required to sign the appropriate documentation for the acceptance of a place at the school and the bursary including their agreement to any conditions relating to the bursary.

The School expects that a student in receipt of a Bursary award will, subject to conduct and academic attainments and contribution to the school community, progress through the School and complete the Upper Sixth Year at Kellett if the initial enrolment is into Senior School.

4 Current Kellett School Pupils - Change in Family Circumstances

4.1 The Application Process.

Kellett School recognises that family financial circumstances may alter during a student's time at Kellett. Accordingly, families may apply for financial assistance by way of bursaries if they have encountered a "sudden and unexpected" change of circumstances during the period of 12 months immediately prior to the date of application.

As the bursaries are intended only for boys and girls whose parents have encountered sudden and unexpected change of circumstances, it is necessary for details of the parents' financial position to be supplied. Accordingly, the financial information is to be completed and forwarded with the application. The Principal will treat this information as confidential.

Within overall budget funding the School will, in normal circumstances, set aside each year a Hardship Fund, for cases of sudden, unforeseen need or where applications seeking bursary support are received out of the normal calendar cycle for bursary submission, scrutiny and award. This sum will be set within the School's overall budgetary constraints.

4.1.1 Step One: Statement of Financial Circumstances (Confidential)

Parents/guardians seeking a bursary are required to complete the Form which seeks to establish the financial circumstances of the household. The School needs this information so that it may assess the applicant family's extent of need and consult with parents about the financial commitment which the family can reasonably make to the payment of tuition fees. The Form, which requests details of income, outgoings, assets and liabilities, must be completed accurately and in full. Documentary evidence must be included, which may be photocopies of salary statements, bank records, dividend/bond statements, tax statements, etc. and in the case of a sudden change of circumstances we may also require photocopies of notification or redundancy or cancellation of a contract, a statement of new income, court demands etc.

Incomplete Forms will be returned and not considered until completed in full. The completed Form(s), together with the necessary documentary evidence, is to be submitted to the Principal's PA.

4.1.2 Step Two: Assessment of Suitability, Interview and Recommendation

Each application will be assessed by the Principal and DFO in order to establish the level of financial support required to allow the student to remain at the School. The Principal and DFO will consider a number of factors when making the judgment as to the justification for financial support, and the extent of such financial support, if any. In the main, the opinion of the Principal as to the student's academic ability and potential to contribute to and benefit from the ethos and activities of the School are the first considerations in granting support. Other circumstances which may be considered include:

- Where a parent/guardian is terminally ill or is unable to secure permanent employment due to poor health which will impact adversely on the family finances.
- 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' separation. In such cases the school will reserve the right to reclaim any assistance provided from any future settlement between the parents.

Each pupil to whom support is offered will be expected to make sound academic progress, develop the quality of his or her work, and participate in and contribute to the school community.

An applicant family considered by the School to be a potential candidate for a bursary award may be invited to attend an Interview (the 'Interview') with the Principal and/or the DFO at which time their bursary application will be discussed in more detail. This may involve the DFO, or his representative, visiting the parents/guardians' home to ensure the information has been correctly presented and interpreted and that the basis of the financial assessment is fair.

The Principal and the DFO prepare a joint recommendation to the Governors for a bursary award. Normally the Chair of the Board and/or Chair of the School Finance Committee will review the joint recommendations for bursary awards presented by the Principal and DFO and make recommendations for approval to the Board of Governors. Bursaries are awarded at the discretion of the Governors.

Such awards are at the discretion of the Governors and are subject to the availability of funding and cannot be guaranteed.

4.1.3 Step Three: Offer of a Bursary Award

The parents/guardians are advised whether their child is to be offered a Bursary award, if any.

4.1.4 Step Four: Acceptance of a Bursary Award

Parents/guardians are then required to sign the appropriate documentation for the acceptance of a bursary award including their agreement to any conditions relating to the bursary.

5 Financial Limitations

The determination of the amount of the bursary award is not influenced by the level of the academic ability of the child (beyond the requirement to satisfy the School's entry and suitability criteria) but by the extent of need. Each case is assessed on its own merits and awards are made accordingly, subject to the School's budget constraints. Only in the most exceptional cases will a bursary award be made to a family who have significant net assets (e.g. in the form of property equity or investments). In cases where families have significant net assets but little or no income, for a period to allow assets to be realised, the School is more likely to consider requests for deferred payment arrangements rather than a bursary award.

It is recognised that judgments 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 carefully and comprehensively considered and so, as well as current earnings, other factors which will be considered in determining the appropriate level of award will include:

- The ability to improve the financial position or earning power of the family.
- 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.
- 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.

- Where fees are being paid to other schools (or universities) the School's bursary award will take into account all these outgoings.

Acknowledging that others might have a different view, the School considers that the following examples may not be consistent with the receipt of a bursary:

- Frequent or expensive holidays.
- High-value Assets owned such as luxury cars, boats, household items of significant value, etc.
- Investment in significant home improvements.
- Second property/land holdings.

6 Annual Review

All bursary awards are subject to a review of parental means each year and may be varied upwards or downwards depending on parental circumstances. Current bursary holders will, if deemed necessary, be issued with further means-testing forms at the beginning of April each year for return by the end of the month.

For those previously in receipt of bursaries, the Principal and DFO, in making their joint recommendation to the Board of Governors have the discretion to recommend a 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. Any changes in a family's financial circumstances will be taken into account and may result in the reduction of the amount of a bursary award or the removal of a bursary award. The determination of a bursary award is at the discretion of the Governors.

7 Confidentiality

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

8 Retention of Financial Information

Kellett School will:

- store Financial Information and other confidential documents provided by an applicant family in locked, non-portable storage containers, access to which will be restricted to those members of the School entitled to see it as part of their duties;
- retain all relevant financial Information and associated correspondence in accordance with the guidance for the retention of pupil records and the Data Protection Act;
- if the application is unsuccessful and within six months, confidentially destroy all documentation relating to the application, unless the applicant specifically requests the School to keep the information on file.