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## **Bursary and Hardship Policy and Procedures**

Date: September 2023

Review Cycle: Annually

Next Review Date: September 2024

Reviewed by: Bursar

Bredon School is owned and operated by Cavendish Education; the Proprietary Body also known as the Governing Body. Any reference to Governors means any Director of Cavendish Education.

This Policy document is one of a series of Bredon Policies that, taken together, are designed to form a comprehensive, formal Statement of Bredon's aspiration to provide an outstanding education for each and every one of its students and of the mechanisms and procedures in place to achieve this. Accordingly, this Policy needs to be read alongside all of these Policies in order to get the full picture; in particular it should be read in conjunction with the ***Equality Policy, The Health and Safety Policy and the Safeguarding Children and Child Protection Policy***.

All of these Policies have been written, not simply to meet statutory and other requirements, but to evidence the work that the whole School is undertaking to ensure the implementation of its core values:

'To be a small, family school that genuinely focuses on the individual; ensuring each pupil reaches his or her personal potential and destination by way of a rich and diverse journey based on breadth of opportunity, support and continuously striving towards excellence.'

In all Bredon Policies, unless the specific context requires otherwise, the word "parent" imports the meaning parent, guardian, carer or any person in whom is vested the legal duties and responsibilities of a child's primary caregiver.

**Bredon employs the services of the following consulting companies to ensure compliance is met and that the best practice is implemented:**

**Peninsula HR Online  
Peninsula Business Safe (Health and Safety)  
Atlantic Data (DBS)  
Educare (online CPD)**



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### **Bursary Policy General**

Bredon seeks to support students who are unable to pay the full fees by offering eligible parents means-tested financial support with the payment of school fees. Such support is known as a bursary and these may be awarded in the form of a discount on tuition fees. Bursary support is based on an assessment of financial circumstances. It considers capital assets as well as income, investments and savings. This policy should be read in conjunction with the Admissions Policy, which can be found on the school website.

Those considering an application to Bredon School with a bursary being crucial to this application, should be aware that the vast majority of fees will need to be paid. As a relatively small school, offering low class sizes, additional support and a wide experience, the ability to offer discounts via bursaries is extremely limited.

Requests for financial support usually fall in the following two categories:

- **Hardship Awards** – Existing Pupils: awarded to 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. Hardship awards would therefore typically be awarded to see the pupil through to the end of the next academic year or to cover to the end of the two GCSE years or Sixth Form.
- **Bursary Awards** - New Applicants to the School: Where a place has been offered, but parents are unable to pay part of the tuition fees.

Please note that throughout this document both hardship and bursary awards are referred to as bursary/bursaries in this policy.

### **The Application Process**

All applications to Bredon School should begin with contacting the Admissions Team. It should be made clear that a bursary application will be made as part of the process.

Bursaries are mainly reviewed annually in the early part of the spring term. All applications must be received by the end of the autumn term and it is endeavoured that parents will be informed by end of the spring term if a bursary is awarded. Bursaries may be awarded outside of this annual process, but usually only for hardship bursaries and thus will be on rare occasions. These usually will be for existing pupils where unforeseen or exceptional circumstances have resulted in a family becoming unable to meet that year's fees.

Bredon School uses the services of Bursary Administration Limited to assist in the bursary application process. This is an external company that is used by many schools to review bursary applications.



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Parents may apply for a bursary using the forms available from the Bursar. These forms seek to establish the financial circumstances of the household and must be accompanied by full documentary evidence. Completed forms and evidence should be submitted directly to Bursary Administration Limited. A visit to the parents' home or a telephone interview by Bursary Administration Limited is often carried out to ensure that the information submitted is correctly interpreted and that the basis of the assessment is fair. Bursary Administration Limited then provides a report to the School summarising their findings.

The reports from Bursary Administration are sent to the Bursar with a proposal/recommendation for the level of bursary support.

The Head and Bursar assess all applications to establish the likely level of support required in order to allow the pupil to attend or continue at the School. The Bursar will then write to the parents with the outcome of the bursary application.

Should a bursary be offered, parents are required to acknowledge their agreement in writing of any conditions relating to the bursary which they will be expected to fulfil.

#### **Considerations in the Assessment Process:**

The Head and the Bursar will consider a number of factors when making a judgement as to the justification for support and the extent of any such support. Each application is considered on its own merits. 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 any financial support it offers is well-focused and targeted towards those most in need.

Accordingly, as well as current level of earnings, other factors will be considered in determining the necessary level of grant. These might 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 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 an outside source

Acknowledging that others might have a different view, the school considers that



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indications of wealth such as the following, for example, would not be consistent with the receipt of a bursary:

- frequent or expensive holidays;
- new or luxury cars;
- investment in significant home improvements;
- higher than average non-contractual pension contributions
- a second property/land holdings;
- valuable works of art;
- the child attending discretionary overseas school trips;
- only one parent in a two parent household working unless there is a good reason.

It is recognised that in addition to financial constraints, there may be other circumstances which should be considered. These might include:

- the social needs of the child
- where a parent is terminally ill or is unable to secure permanent employment due to poor health
- Suitability of applicant

Please note that bursary funds are strictly limited.

### **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 at the beginning of spring term each year for return by the end of the first month. The Bursar will endeavour to inform parents if they have been awarded a bursary by the end spring term. Awards remain subject to conditions of award provided with the letter of offer.

### **Confidentiality**

The school respects the confidentiality of bursary awards made to families and recipients are expected to do likewise. The disclosure of an award to a third party may result in the award being withdrawn by the school.

### **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 an unforeseen change of circumstances may be unable to remain at the school.

Bredon School encourages parents to apply for support where it is felt a good case can be made for assistance.



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Further information on how to pursue such assistance may be obtained from the from The Educational Trusts' Forum - [www.educational-grants.org](http://www.educational-grants.org)

### **Helping Others in Future**

There are limited funds available for Bursaries, therefore in order to allow the School to offer financial assistance to future applicants, we hope parents/guardians who have benefited from Bursary funding will consider repaying all or part of the Bursary received, when and if their circumstances allow.

Furthermore, we trust that Old Bredonians who benefited from Bursary support will want to contribute to the funding of future Bursaries via donations to the Bredon School Bursary and Hardship Fund to help other students, when their future financial position allows.

### **General Data Protection Regulation**

The School will need to collect and use information relating to pupils and parents for the purpose of evaluating an application for a Bursary. This may include (but is not limited to) name, address, contact information and detailed financial information. This information is used for the purpose of enabling the School to evaluate any Bursary application that is made to it, voluntarily, by parents/guardians. This information may be collected and analysed by Bursary Administration Limited on behalf of the School, but otherwise will not be shared with any third parties. The School will process personal data in accordance with the Data Protection Act 1998 (as amended or superseded including from 25 May 2018 the General Data Protection Regulation) and other related legislation. Personal data relating to unsuccessful applicants is deleted within three years of the end of the application process, except that a record of the applicant's name and a basic description of the reason they were unsuccessful is retained for the School's internal records. Upon written acceptance of a place at the School, the Terms and Conditions will apply (and any other privacy notices which the School provides to individuals from time to time).

### **Accounting for and releasing funds to the Hardship Fund**

The Hardship Fund is maintained from specific funds received by Bredon School over time. These will normally consist of the following:

1. One off-donations from parents, towards the hardship fund.
2. Upon a pupil completing their time with Bredon School, the Parents are given the option to donate their deposit towards the hardship fund;
3. In the rare and unlikely instance where other cash receipts have been received by Bredon School where:
  - a. the source cannot be traced/ acknowledged; and



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b. to which are older than 6 years.

In this case, 3 attempts to contact the parent or funder by either Xero (where parent fee invoices have been sent and paid by the parents to Bredon School), email or letter before the funds are moved into the Hardship Fund.

Bursar