

## FINANCIAL ASSISTANCE WITH FEES FOR NEW PARENTS

Owner:	MB
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### Introduction

1. The Governors of Lady Eleanor Holles (LEH) are committed to ensuring that girls who would benefit from an education at LEH are not excluded from entering the School for financial reasons, by offering to eligible parents/guardians 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 of up to 100% on tuition fees payable, depending on the financial, compassionate or other pertinent circumstances of applicants.
2. The School has charitable status and the Governors wish to ensure the limited available funds are used to support parents who otherwise would not be able to send their daughter to the School. Therefore, any such award is based not only on the child's performance in the entrance examination, but also on an annual declaration of income and assets.
3. The number of awards available is entirely dependent on the funds that are available at the time. Where the number of applications exceeds the funds available, awards will be made on the basis of the applicant's performance in the entrance examination. Bursaries are reserved for girls entering the Senior School.
4. Bursary awards are subject to repeat testing of parental means each year, and may be varied upwards or downwards, depending on parental circumstances. As a very rough guide, parents/guardians whose combined income is less than £50,000 could be offered a 100% discount on the tuition fees, whilst those with a combined income of over £90,000 are unlikely to qualify for assistance. 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, the size of their family, any other persons dependent upon them, employment situation and similar factors), compassionate or other pertinent considerations. A bursary application may only be made at point of entry to the School. If an applicant is unsuccessful at this stage, the School will not consider a later application. If parents have a material change in their financial circumstances, hardship funds may be available via a similar application process.

### The Bursary Scheme

5. **General**
  - a. The purpose of the Bursary Scheme is to ensure that girls of high academic ability, but whose parents are of limited financial means, are able to attend the school.

- b. A bursary can be awarded to pupils entering the School providing the pupil is of sufficiently high academic ability and her parents are of limited financial means.
- c. Where funds are limited, awards will be made on the basis of the applicant's performance in the entrance examination.
- d. The award is subject to annual financial assessment.
- e. Those awarded a bursary will normally receive a grant in the same percentage as the bursary award towards certain extras which are directly related to attendance at LEH (see Annex A).

## 6. **The Application Process**

Bursaries are awarded at the discretion of the Governors. The Head Mistress and Director of Finance are responsible for the management and coordination of the process.

Step One: Parents should apply for a bursary when they confirm that their daughter is to sit the entrance examination. Parents/guardians seeking a bursary are required to complete an application form which seeks to establish the financial circumstances of the household. The application, which requests details of income and capital, must be accompanied by full documentary evidence. The completed application, together with the necessary documentary evidence, must be signed by both parents, where applicable, and submitted to the Director of Finance no later than December 1 in any year for bursaries to start the following September (for external applications to join the Sixth Form, bursary applications must be submitted by November 1). For girls entering the Senior School from LEH's Junior School, parents should similarly submit a completed bursary application form not later than December 1 prior to entry into the Senior School.

The principle is that all applicants are treated equally. Where applicants receive benefits (apart from universal benefits such as Child Benefit), these benefits will be treated as net income and will be grossed up to equate to a similar gross salary that would be paid to generate that level of net salary.

Step Two: All applications will be 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 may involve the Director of Finance, or an external agent appointed by the Director of Finance, 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 Director of Finance prepares a recommendation which is considered with the Head Mistress and a joint recommendation is then reached.

Step Four: The parents/guardians are advised whether their child is to be offered a place at the School and whether or not a bursary will be available.

Step Five: Parents/guardians are required to sign a letter accepting the place at the School and an acknowledgement agreeing to any conditions relating to the bursary. Parents awarded a bursary are required to provide a reduced place deposit based on the level of the award as follows:

Parental Contribution	Nil - 20%	£300
	21% - 50%	£500
	51% - 80%	£750
	81% - 100%	£1000

## 7. The Case for Assistance

The Head Mistress and Director of Finance will consider a number of factors when making the judgment 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) Because bursary funds are limited, awards will be made on the basis of the applicant's performance in the entrance examination. Each pupil to whom support is offered must, in the opinion of the Head Mistress, be likely to make sound academic progress following admission and possess the potential to develop the quality of her work, and benefit from participation in the wider, extra-curricular activities on offer at the School. Previous school reports will be consulted for evidence of good behaviour.
- b) The amount of the bursary award is not influenced by the level of the academic ability of the child, but by the extent of the need.
- c) 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.
- d) 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 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:
  - The ability to improve the financial position or earning power of the family. For example, where there are two parents or 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 properties.
  - 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 siblings are at other fee paying schools or places of education, it would be expected that those organisations offer bursaries of a similar value to those of LEH.
- e) 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 or expensive holidays.
  - New or luxury cars.
  - Investment in significant home improvements.

- A second property/land holdings.
- f) Other factors: It is recognised that, in addition to academic ability and financial constraints, there may be other circumstances which should be considered. These could include:
- Where a child has siblings at the School.
  - Where the social needs of the child are relevant.
  - Where a parent/guardian is terminally ill or is unable to secure permanent employment due to poor health
- g) Joint Application for a Scholarship and Bursary: Parents may be in receipt of a scholarship/exhibition and a bursary. However, if a joint award is made, the total value of the support provided will not exceed the value of the bursary had a scholarship (or exhibition) not been awarded.

**8. Siblings at LEH**

Where a bursary is applied for and there is already a sibling in attendance at LEH, the bursary calculation will increase the applicable outgoings for such sibling to an amount equal to the fees paid by the parent in respect of the sibling(s) to recognize the costs attributable to attendance at LEH.

**9. Annual Review**

All bursaries are subject to repeat testing of parental means each year, and may be varied upwards or downwards depending on parental circumstances. Bursary holders will be issued with repeat 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 Head Mistress and Director of Finance have the discretion to recommend to the Governors 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.

**10. Confidentiality**

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

**11. 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. LEH 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 Educational Trusts Forum](#) and also [The Joint Educational Trust](#).

## Annex A to Financial Assistance with Fees

### Financial Assistance with Extras

1. Those awarded a bursary will normally receive a grant in the same percentage as the bursary award towards the following extras, which are directly related to attendance at LEH:
    - Transport to and from school;
    - Field trips which are part of the curriculum;
    - Residential overseas trips that are related to (but not a formal part of) the curriculum;
    - Uniform and sports equipment;
    - Purchase of an ipad, to the extent required by the School;
    - Siblings at LEH;
    - Public examination entry fees;
    - School lunch.
  
  2. **Transport To and From School:**

If the pupil has been allocated a place on a coach supplied by Pupilcoach Ltd, the School will meet the termly cost of the coach (pro-rated if the bursary award is less than 100%) as set by Pupilcoach Ltd until such time as the place is relinquished.
  
  3. **Field Trips which are part of the Curriculum:**

Throughout their time at the School, pupils may be expected to attend various field trips which may be an essential part of the curriculum for that subject. For those on a bursary, a grant may be made towards the cost of any travel and accommodation required as a result of the trip to the percentage level of the bursary award. The Head of Department will decide whether or not a trip is a requirement of the curriculum.
  
  4. **Residential trips which are not part of the Curriculum:**

Each bursary holder will be entitled to choose one residential overseas trip per year whose cost will be paid by the Morgan Fund (or such other funding source as the School may determine from time to time) in the same percentage as the bursary award. The portion of the cost not covered by the bursary will need to be paid by parents at the same time as the charges to be paid by parents of pupils who do not benefit from a bursary.
  
  4. **Public Examination Entry Fees:**

The fees for public examinations which are part of the School curriculum will be met by the School (pro-rated if the bursary award is less than 100%). The cost of any examination for which a pupil enters, but which is not part of the School curriculum will be debited to the pupil's account.
  
  5. **Uniform and Sports Equipment:**

Pupils attending Lady Eleanor Holles are expected to wear the designated school uniform as set out in the Parent Handbook. A grant of £750 (pro-rated if the bursary award is less than 100%) will be made at the beginning of the pupil's first term at the School to assist with the purchase of the school uniform. A
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further grant of £300 per annum (pro-rated as above) will continue until the bursary ends, the pupil leaves the School or enters the Sixth Form.

**6. School Lunch:**

The School will cover the cost of school lunch (pro-rated if the bursary award is less than 100%). However, the cost of other food or beverage sold at School (for example during morning break) is outside the scope of bursary awards and must be met by parents.