



## **The Bury Grammar Schools Bursary Policy**

### **Introduction**

The Governors of The Bury Grammar Schools are committed to broadening access to the School by offering to eligible parents/guardians, means-tested financial support towards the payment of Schools fees. Such support is known as a bursary and bursaries may cover up to 100% of school fees payable, depending on the financial, compassionate or other pertinent circumstances of applicants.

### **Means testing**

Central to School's bursary programme is fairness. The School anticipates that the demand for bursaries will always exceed the amount of funds we have to offer and as such, the Governors must ensure that bursaries are given where there is genuine need. Therefore, bursary awards are subject to repeat testing of parental means each year. Bursaries may be varied downwards if parental circumstances improve but there is no obligation on the School to increase a bursary if parental finances worsen.

The School may ask to visit the parents/guardians at home before offering a bursary. In addition, the School may ask to visit the home of a current bursary recipient at any time. No new bursary will be given or existing bursary continued if parents/guardians refuse without reasonable excuse or fail upon reasonable notice being provided to make without delay appropriate arrangements for a home visit from the School's representatives.

Awards are made on the basis of the School's confidential bursary assessment calculation that sets out award levels in relation to a family's financial circumstances.

The School may use a third party specialist to assess bursary applications and assist in the bursary process. The assessment calculation includes account being taken of such factors as parental income, outgoings, assets and liabilities.

### **Parental income boundaries**

The parental income boundary represents the income limit set by the School. If parental income is above this limit, bursaries would not usually be given, but Governors reserve the right to consider families with earnings above the parental income boundary in exceptional circumstances. The Governors review and set the upper parental income boundary each year and take into consideration many factors including local wage inflation, RPI and other factors. The upper income boundary is published in all bursary documentation.

## Requests for bursary support

Requests for bursary 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 tuition fees.
- 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.

*BGS does not give bursaries unless the bursary application paperwork is completed and signed by all parties who have signed the Acceptance Form.*

## New applicants to the School

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's websites, event literature (e.g. Open Days) and by means of press articles and advertisements.

### The Application Process.

Bursaries may be made available to parents/guardians of children entering at year 7 and year 12. They are awarded at the discretion of the Governors and the Head and Director of Finance are responsible for the management and coordination of the process.

- Step one - parents/guardians seeking a bursary are required to complete an application form, which seeks to establish the financial circumstances of the household. The form is available on the School's website or directly from the Bursar's office. The completed forms, together with the necessary documentary evidence, are to be submitted to the Director of Finance no later than the date stipulated in any year for bursaries to start the following September.
- Step two - the Director of Finance (and in some circumstances a third party assessor appointed by the School) 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. This may involve the Director of Finance, or her/his representative, 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 in accordance with the confidential calculations of awards, which is considered by a panel, which will include the Head, and a joint recommendation is then reached.
- Step four - parents/guardians are advised whether their child is to be offered a place at the School and of the bursary offer.
- Step five - parents/guardians are then required to sign a letter accepting the place at the School and an acknowledgement agreeing to any conditions relating to the bursary.

## The case for assistance

The Head and 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. In the main, the child's suitability for the School is the first consideration in granting support.

- 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 those likely to gain most from the educational provision. Each pupil to whom support is offered must, in the opinion of the head, 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. Previous school reports will be consulted for evidence of good behaviour.
- 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:
  - 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.
  - 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.
  - In cases of separation, divorce or dissolution, the contribution made by or reasonably to be expected from the absent parent.
  - Contribution to household costs by other, wider, family members, any adults unrelated to the child or by outside sources.
  - A potential benefit under any trust arrangement.
  - Any potential sources of borrowing at reasonable rates of interest.
  - Where fees are being paid to other schools (or universities), the School will take into account all these outgoings.
  - 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.

## **Existing pupils - change in family circumstances**

The Governors recognise that unforeseen changes in family circumstances can happen and requests for funding will be reviewed on an individual basis. The School will only be able to offer assistance within overall budget funding.

## **Annual review**

All bursary awards are subject to repeat testing of parental means each year and may be varied downwards or withdrawn altogether if parental circumstances improve but there is no obligation on the School to increase a bursary if parental finances worsen.

Current bursary holders will be issued with repeat means-testing forms each year and these must be returned to the School by the deadline date shown on the form.

For those previously in receipt of bursaries, the Head and Director of Finance, in making their joint decision, 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, including for example by the late payment of any contribution they are making to the fees.

## **Confidentiality**

The School respects the confidentiality of bursary awards made to families.

## **Privacy and Data Protection**

In order to administer the School's Bursary process, we (the School) will ask all applicants to complete a Bursary Application Form when they first apply for a bursary and, if they are awarded a bursary, each year thereafter. This form captures financial and other information relating to your family that allows us to assess your bursary application, please see the Bursary Application Form for more details.

The legal basis on which we collect and use your personal information is that it is necessary for administering the bursary contract with you. We will retain the Bursary Application you send us, including back up documentation, in accordance with the School's Data Retention Policy.

We may share the personal information that you give us with third party companies that assist us in assessing bursary applications, with our professional advisors (lawyers, accountants) and with Government owned organisations such as HMRC and the Police.

You have a number of rights over your personal information, which are:

- the right to make a complaint to the Information Commissioner's Office (ICO) if you are unhappy about the way your personal data is being used – please refer to the ICO's website for further information about this (<https://ico.org.uk/>);
- the right to ask us what personal information about you we are holding and to have access to a copy of your personal information;

- the right to ask us to correct any errors in your personal information;
- the right, in certain circumstances such as where our use of your personal information is based on your consent and we have no other legal basis to use your personal information, to ask us to delete your personal information;
- the right, in certain circumstances such as where we no longer need your personal information, to request that we restrict the use that we are making of your personal information;
- the right, in certain circumstances, to ask us to review and explain our legitimate interests to you; and
- the right, where our use of your personal information is carried out for the purposes of an agreement with us and is carried out by automated means, to ask us to provide you with a copy of your personal information in a structured, commonly-used, machine-readable format.

If you would like to contact the School regarding data protection, please email [dataprotection@burygrammar.com](mailto:dataprotection@burygrammar.com).

### **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. The School encourages (and in some cases assists) 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 Bursar's office.

### **Declaration**

All bursary applicants will be asked to complete a declaration that to the best of their knowledge and belief, all the particulars submitted on the bursary application forms and annual review forms are true and contain a full statement of their income from all sources during the periods shown, and all assets (and liabilities if applicable) held by them.

**All bursary awards are subject to the provision of truthful and accurate information. Deliberate provision of false and/or misleading information is a criminal offence and will lead to the matter being referred to the police. The provision of false and or misleading information or the failure to provide all material information will lead to the child or children in question being disqualified from awards and the full fees paid from the date the bursary was awarded being upon demand immediately repayable together with interest equivalent to the High Court Judgment debt rate from the date such monies were advanced under the bursary to repayment in full being made.**