



STONYHURST

AMDG

Academic Year 2022-23

BURSARY POLICY AND PROCEDURE	
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If you would like to request a printed copy of a policy, please contact Compliance@stonyhurst.ac.uk

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I. PURPOSE

- 1.1. The Governors of Stonyhurst are committed to broadening access to the school by offering to eligible parents/guardians means-tested financial support with the payment of school fees. Such support is known as a bursary and bursaries may be awarded in the form of a discount of up to 100% on fees payable, depending on the financial, compassionate or other pertinent circumstances of applicants. The preference is that parents should make some form of contribution towards fees.
- 1.2. This policy and procedure will be followed for all applications from all sources of funding, i.e. Stonyhurst Foundation, Charitable sources and our own bursary fund.
- 1.3. Bursaries fall into two categories:
 - **Life changing / transformational bursaries** - These are full boarding bursaries up to the value of 100%. These awards enable the opportunity for any young person who will flourish at Stonyhurst, regardless of his/her background or financial circumstances. The source of such a bursary is The Stonyhurst Foundation or another endowed fund. Preference is given to Roman Catholic candidates.
 - **Talent bursaries** - These bursaries support young people to attend Stonyhurst in order to develop their gifts and talents to be 'all that I can'. These bursaries are awarded in conjunction with academic, drama, music, all-rounder and sport scholarships. Please note that scholarships are competitive. Scholarship awards amount to a 10% discount upon the day and boarding fees, and a scholarship award can be supplemented by a bursary award. In the case of applications for a talent bursary, preference is given to full boarders.
- 1.4. A separate Scholarship Policy is in place and should be consulted alongside this document.

2. SCOPE

- 2.1. Bursary awards are subject to repeat testing of parental means each year and may be varied upwards or downwards, depending on parental circumstances. Awards are made on the basis of the confidential Stonyhurst scale of awards which sets out award levels in relation to a family's financial circumstances. The scale of awards is reviewed and revised annually by the Finance Director to reflect any changes in fee costs. Though awards are generally tied to this scale, they may be varied upwards or downwards depending on individual parents'/guardians' circumstances (eg their savings, investments and realisable assets, as well as their income, the size of their family, any other person dependent upon them and like factors), compassionate or other pertinent considerations.
- 2.2. 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 tuition fees in full or after the award of a scholarship.
 - 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.

3. NEW APPLICANTS TO THE SCHOOL

3.1. 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 prospectus
- The school website
- The national, regional and local press by means of advertisements

4. THE APPLICATION PROCESS

4.1. Bursaries may be made available to parents/guardians of children entering any year of Stonyhurst (see the School's Admissions Policy). They are awarded at the discretion of the Headmasters and the Finance Director is responsible for the management and co-ordination of the process, as follows:

Step 1

Parents/guardians seeking a bursary are required to complete an on-line application form which seeks to establish the financial circumstances of the household. The process, which requests details of income and capital, outgoings and affordability must be accompanied by full documentary evidence. An example disclosure is found at Appendix A. Admissions will advise the Bursary of a new applicant and the invitation to complete their online application will be issued within two working days. A complete submission by the parents is expected within five working days.

Step 2

The Finance Director 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 assessment will be provided within three working days. At this stage, this provides Admissions with an indicative level of support to enable them to prioritise the applications.

Step 3

Admissions indicate to the Bursary which applicants can be considered in more details, which will involve the Finance Director, or 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, alongside other due diligence techniques. This stage will normally be completed within two weeks, but is dependent upon the availability of the applicant(s). Home visits are usually undertaken by an external agent.

Step 4

The Finance Director prepares a recommendation in accordance with the Stonyhurst confidential scale of awards. This stage will be completed within two working days of step 3 being completed. A peer on peer review is undertaken and recorded on an internal due diligence checklist procedure held in the Bursary.

Step 5

The parents/guardians are advised whether their child is to be offered a place at the school and of the bursary offer by the Headmasters. This letter will contain an acceptance of the place at the school and an acknowledgement agreeing to any conditions relating to the bursary.

- 4.2. The timescale for steps 1 & 2 should be no more than two weeks and can be much quicker dependent upon the submission of the information required. Steps 3 & 4 shall be dependent upon the applicants' availability and the assessment tasks referred to in this document.
- 4.3. The Finance Director and the Head of Admissions and Marketing have fortnightly meetings to ensure communications are open and transparent about where each applicant is in the process, and tracker spreadsheets are maintained.

5. THE CASE FOR ASSISTANCE

- 5.1. The Headmasters and the Finance Director will consider a number of different factors for their roles 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 and is assessed by the Headmasters.

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 respective 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 will be consulted for evidence of good behaviour and other considerations shall be captured, such as, the children of OS. A summary of this process will be evidenced by the completed bursary consideration form, see Appendix 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 what is viable within the context of its overall budget and any scholarship award. 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 awards 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 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 non-resident 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 grant will take into account all these outgoings.
- Intelligence obtained by the Admissions department from all of their interactions with the applicants through communications with current school, tours and visits.
- Information available in the public domain from the Internet, i.e. Zoopla and Google searches.
- 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; or
 - A second property/land holdings

Other factors

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

- Where a child has siblings at the school.
- Where the social needs of the child are relevant (e.g. may be suffering from bullying at their present school).
- Where a parent/guardian is terminally ill or is unable to secure permanent employment due to poor health.
- 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 separating.

6. EXISTING PUPILS – CHANGE IN FAMILY CIRCUMSTANCES

- 6.1. Within overall budget funding, the school will in normal circumstances set aside each year a hardship fund, for cases of sudden, unforeseen need or whether applications meriting bursary assistance are received out of the normal calendar cycle for bursary submission, scrutiny and award. This sum will be set within budgetary constraints. Parents/guardians with a child at the school whose financial circumstances suddenly change may apply for a bursary to the Finance Director, explaining their situation and using the on-line system. Such awards are subject to the availability of funding and cannot be guaranteed.

7. ANNUAL REVIEW

- 7.1. 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 at the beginning of May each year for return by the end of the month. For those previously in receipt of bursaries, the Finance Director has the discretion to reduce or increase an award dependent upon the annual review. The Headmasters have the discretion to withdraw an award 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.

8. FUNDING STRUCTURE

- 8.1. In the Christmas Term of each year, the funding forecasts for the bursary awards for the academic year ahead shall be calculated by the Finance Director, and a recommendation from the Executive, to the Finance & General Purposes Committee shall take place. This calculation shall take into consideration the current needs of the desired shape of the schools as referred to in this document, the charity's overall financial strategy, alongside the allocation between the two schools and the timing of the release of the termly allocations. Once the funding budget is agreed by the Finance & General Purposes Committee, individual award decisions are made by the Headmasters. These awards can be spread across a number of applicants of different status, subject to the desired shape of the school, i.e. UK Roman Catholic Boarders.
- 8.2. As referred to earlier in this document, an allocation will be reserved for in-year change of circumstances/hardship cases.

9. GOVERNANCE

- 9.1. At each termly meeting of the Finance & General Purposes Committee, a pack of information shall be shared consisting of:
- an anonymised update of the applications received/in progress;
 - a random selection of anonymized cases/awards for review; and
 - a financial report to track awards to the funding allocations.

10. CONFIDENTIALITY

- 10.1. The school respects the confidentiality of bursary awards made to families and recipients are expected to do likewise. All relevant Data Protection protocols are adhered to.

11. EXTERNAL SOURCES OF ASSISTANCE

- 11.1. Stonyhurst operates a scholarship award scheme and the details of this can be found in the Scholarship policy and procedure.

11.2. 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. Stonyhurst encourages parents/guardians to apply for support where it is felt a good case can be made for assistance.

11.3. Further information on how to pursue such assistance may be obtained from:

- The Finance Director
 - Address: Stonyhurst College, Clitheroe, BB7 9PZ
 - Email: s.whitford@stonyhurst.ac.uk

- The Educational Trusts' Forum
 - Website: www.educational-grants.org

- The Royal National Children's Foundation
 - Website: www.rncf.org.uk

APPENDIX A – Stonyhurst Bursary Application

APPENDIX A – Stonyhurst Bursary Application		
Child's Details		
Date		
Surname		
Forename		
DOB		
Year of Entry		
Type of Bursary		
Parental Contact(s)		
Parental Contact(s)	Parent 1	Parent 2
Contact Type	First Parent	Second Parent
Title		
Forename		
Surname		
Day Telephone		
Mobile Telephone		
Email Address		
Address		
Marital Status		
Parents' Marital Status		
Parent 2 not applicable		
Description		
Household 1 Status		
Household 1 Parental information amended?		
Household 2 Status		
Household 2 Parental information amended?		
Number of Households		

Household Details		
Household Details	Parent 1	Parent 2
Contact Type	First Parent	Second Parent
Title		
Forename		
Surname		
Day Telephone		
Mobile Telephone		
Email Address		
Address		
Dependant Children		
Surname		
Forename		
Date of Birth		
Current School / College		
Annual income of child		
Capital Value of Trust		
Annual School or other educational fees		
Compulsory additional school charges		
Covered Fees Scholarships		
Covered Fees Capital Repayment Scheme		
Covered Fees Educational Insurance Policies		
Covered Fees Education Allowances		
Covered Fees Education Allowances Description		
Covered Fees Other Sources		
Covered Fees Other Sources Description		
Covered Fees Court Order		
Covered Fees Financial Assistance		

First Parent Occupation – Full Time Employed	
Occupation	
Start Date	
Employer Name	
Employer Address	
Employer Phone No	
First Parent Occupation – Part Time Employed	
Occupation	
Start Date	
Employer Name	
Employer Address	
Employer Phone No	
First Parent Occupation – Self Employed	
Business Proprietor	
Type of Self Employment	
Occupation	
Business Name	
Business Address	
Business Phone No	
Business Proportion of Ownership	
First Parent Occupation – Ltd Company	
Proprietor or Director of a Limited Company	
Company Name	
Company Address	
Company Phone No	

Proportion of shares owned	
First Parent Occupation – Unemployed	
Unemployed Date	
Previous Occupation	
Previous Salary	
Previous Hours	
Reason for your period of unemployment	
Potential Occupation	
Potential Salary	
Potential Hours	
Not Seeking Employment Reason	
First Parent Occupation – Retirement	
Retirement Date	
Second Parent Occupation – Full Time Employed	
Occupation	
Start Date	
Employer Name	
Employer Address	
Employer Phone No	
Second Parent Occupation – Part Time Employed	
Occupation	
Start Date	
Employer Name	
Employer Address	
Employer Phone No	

Second Parent Occupation – Self Employed	
Business Proprietor	
Type of Self Employment	
Occupation	
Business Name	
Business Address	
Business Phone No	
Business Proportion of Ownership	
Second Parent Occupation – Ltd Company	
Proprietor or Director of a Limited Company	
Company Name	
Company Address	
Company Phone No	
Proportion of shares owned	
Second Parent Occupation – Unemployed	
Unemployed Date	
Previous Occupation	
Previous Salary	
Previous Hours	
Reason for your period of unemployment	
Potential Occupation	
Potential Salary	
Potential Hours	
Not Seeking Employment Reason	
Second Parent Occupation – Retirement	
Retirement Date	

Income			
	First Parent	Second Parent	Total
Salary			
Fees Commissions Bonuses			
Director Fees			
Benefits In Kind			
Gross Pension			
Social Security Benefits			
Child Benefit Working & Child Tax Credit			
Investment Income from Dividends			
Investment Income from Building Societies /Banks			
Investment Income from other			
Rental Income			
Separation Maintenance Allowances			
Separation Agreement			
Separation Agreement Amount Payable			
Redundancy Payments			
Any Other Income			
Total			
Taxable Profits Previous Year			
Taxable Profits Previous Year End			
Taxable Profits Current			
Taxable Profits Current Year End			

Outgoings			
	First Parent	Second Parent	Total
Tax Payable			
National Insurance			
Pension Contributions			
Principal Mortgage Repayments			
Other Mortgage Repayments			
Mortgage Insurance			
Rent Payable			
Council Tax			
Water Rates			
Other Interest Payable			
Other interest Payable Description			
Other Commitments			
Other Commitments Description			
Total			
Capital Assets			
	First Parent	Second Parent	Total
Principal Residence Value			
Other Properties Value			
Investments Market Value			
Investments Banking			
Investments Shares			
Investments Savings			
Life assurance bonds/policies including endowments			
Cash Value			

Businesses Value			
Lump Sum Payments			
Possessions Value			
Possessions Description			
Other Assets Value			
Other Assets Description			
Owed Monies			
Owed Monies Description			
Any Other Assets			
Any Other Assets Description			
Capital Liabilities			
	First Parent	Second Parent	Total
Principal Mortgage			
Principal Mortgage Outstanding			
Principal Mortgage Term			
Other Mortgages			
Other Mortgages Outstanding			
Other Mortgages Term			
Overdrafts			
Overdrafts Description			
Loan Debt			
Loan Debt Description			
Credit Card Debt			
Credit Card Debt Description			
Other Liabilities			
Other Liabilities Description			

Net Assets			
	First Parent	Second Parent	Total
Total Assets			
Total Liabilities			
Total Net Assets			
Why Net Assets Cannot Pay School Fees			
Exchange Rate Details			
Exchange Currency			
Exchange Rate			
If not applicable			
Supporting Information			
Other Dependants			
Other Dependants Description			
Assistance Required			
How much can you contribute?			
Amount of assistance required and how long			
Sacrifices Made			
Any Additional Information			

Declaration Form			
Complete declaration of income and assets			
Provide evidence to verify income and assets declared			
Completed the form in accordance with the attached notes			
Undertake to inform the Finance Director immediately of any variation in my/our financial circumstances			
Understand that any award if a Bursary is subject to annual review and we/I must complete an annual declaration of our/my financial circumstances			
Parent 1 Signature			
Parent 2 Signature			
Date Submitted			

APPENDIX B – Consideration For Offering Bursary Form

Strategic Requirements Section: All parts should be completed before bursary consideration begins			
Name of Prospective Student:		Agent: Y/N	
Religion:	Current School:	Current Year Group:	
Prospective Year Group & Year of Entry:		Day / Weekly Boarder / Boarder (1-10)	
Date Registered:		UK National/Resident (1-10)	
Pupil /Family Circumstances section:			
	Comments:	Available	Awarded
Headmaster's recommendation		1-10	
Evidence of Academic or other commitment:		1-10	
School Reports		1-5	
CAT Profile		1-5	
Sporting Profile		1-5	
Music Profile		1-5	
Art Profile		1-5	
Drama/Other Profile		1-5	
Personal Statement		1-5	
OS Family		1-5	
Evidence provided for contribution to Stonyhurst ethos		1-10	
Individual or family Pastoral Need		1-10	
Total school requirement points awarded:		20	
Total Pupil/Family circumstances points awarded:		80	
Pupils with a total of 50 or more points may proceed to consideration by the bursary committee			
Decision to proceed & comments:			