



ST MARGARET'S
SCHOOL

Bursaries and Scholarships
Policy

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Bursaries and Scholarships Policy Review:

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Bursaries

St Margaret's School (the "School") is committed to broadening access to the School by making available to parents/guardians of those who have been offered a place following the normal admissions and selection process, 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 of tuition fees payable, depending on the financial, compassionate or other pertinent circumstances of applicants. This discount rarely exceeds 33%, (but please see 100% Bursary section below). At any one time the School expects to help 5% of its pupils by way of financial assistance in line with its charitable objects.

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 School's 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 Director of Finance and Operations (DFO) and the Chairman of the Finance and General Purposes Committee to reflect any changes in the level of fees charged, and approved by the Governors. 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 and like factors) and compassionate or other pertinent considerations.

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
- existing pupils where a change in parents/guardians' circumstances has resulted in a difficulty in meeting tuition fees and may result in the child being withdrawn part way through a stage of education

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 Information Booklet
- the School's website, and
- the local press by means of advertisements

The Application Process

Applicants may not, at the time of application, owe money to the School.

Bursaries may be made available to parents/guardians of children entering Year 7 and above at St Margaret's School (see the Admissions Policy). They are awarded in accordance with this policy and the Head and DFO are responsible for the management and coordination of the process.

- **Step One:** Parents/guardians seeking a bursary are required, by November for entry the following September, to complete an application form which seeks to establish the financial circumstances of the household. The form, which requests details of income and capital, may be found on the school website and must be accompanied by full documentary evidence. The completed forms, together with the necessary documentary evidence, are to be submitted to the DFO at finance@stmargarets-school.org.uk normally at the time of registration but in exceptional circumstances prior to this. All those with parental responsibility (even if separated and one parent makes no contribution to living costs) must complete the form.
- **Step Two:** The DFO 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 DFO, 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.
- **Step Three:** The DFO prepares a recommendation in accordance with the School's Scale of Awards which is considered with the Head and a joint recommendation is then reached.

- **Step Four:** The joint recommendation is presented to the Chairman of the Governors' Finance and General Purposes Committee for approval.
- **Step Five:** The parents/guardians are advised whether their child is to be offered a place at the School and of the Bursary offer. The bursary offers will be made during the Spring Term proceeding the September of entry.

The Case for Assistance

The Head and DFO 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.

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 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, 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 both parents
- 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
- 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 (irrespective of negative equity)
 - significant debt as a result of previous investment decisions
- 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 (eg: 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

Existing Pupils - Change in Family Circumstances

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 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 DFO, explaining their situation and using the forms available on the school website. Such awards are subject to the availability of funding and cannot be guaranteed.

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 in November each year for return by mid-December. For those previously in receipt of bursaries, the Head and DFO, in making their joint recommendation to the Finance and General Purposes Committee have the discretion to recommend to the Governors the reduction or withdrawal of an award where:

- a pupil's attendance, progress, attitude or behaviour is unsatisfactory;
- the parent/guardians' behaviour or conduct (or the behaviour or conduct of one parent/guardian) has been unsatisfactory; and/or
- parents/guardians have failed to support the School, for example by the late payment of fees.

Any such withdrawal of an award will not operate so as to increase the fees due in respect of a term which has already commenced. Where it seems likely that an award will be withdrawn from a pupil, parents/guardians shall be notified in advance.

For further information in relation to how bursaries and scholarships are treated, please refer to the School's Parent Contract.

The 100% Bursary

Each year one 100% Bursary will be available to a pupil on entry to Year 7. The Bursary will be open to a pupil who satisfies the normal entry criteria for a place at the School, but whose family circumstances would normally preclude them from a St Margaret's education. The Bursary will also include daily travel on a school coach if appropriate, the cost of essential educational visits and a grant towards the initial cost of school uniform and equipment.

Information about this Bursary will be circulated annually to maintained schools in the vicinity of the School and an application should be supported by a strong recommendation from the Headteacher of the applicant's current school.

Completed Bursary forms (available on the school website) should be received from the parent(s) by 30th November in the Year preceding entry into Year 7, accompanied by a covering letter. The DFO assesses all applications, which may involve the DFO or his representative visiting the applicants in their own home as explained above. Applicants who fulfill the financial criteria for the 100% Bursary will be notified by the end of the Autumn Term and invited to register to attend the entrance examinations in January, and if their results are satisfactory, will then be invited to attend an interview. A report from the Head of the current school will be requested.

Based on the report received from the current school, performance in the examinations, and at interview as assessed by the Head, and after an interview with the parent(s) conducted by the Head and the DFO one 100% Bursary will be offered each year.

Those who have applied but are unsuccessful will be notified. It is assumed that those meeting the criteria for consideration of the 100% Bursary will be unable to afford fees without this assistance.

The 100% Bursary will be subject to annual review.

Confidentiality

The School respects the confidentiality of Bursary awards made to families and recipients must do likewise.

Scholarships

Scholarships are awarded each year at 11+, 13+ and 16+. The amount awarded is at the Head's discretion, with a cap at 50% of school fees. The majority of scholarships carry a rate of fee remission at the lower end of the awardable range.

Scholarships are intended to allow the School to recognise and nurture talent in a pupil. The current range of scholars includes academic scholarship as well as specialist scholarships in Art, Music, Drama, Sport and STEM. In the Sixth Form, academic scholarships are awarded for specialisms in up to two subject areas. Community service scholarships are also available in the Sixth Form.

Assessments for 11+ and 13+ scholarships take place in the Spring Term. Sixth Form scholarship applications are assessed in the Autumn Term and include an interview with the Academic Director in addition to any written or practical assessments.

The full scholarship package is reviewed annually and published in the School's Scholarships and Bursaries brochure, which is published on the School's website. Scholars are expected to contribute to the life of the School. Failure to do so may result in their scholarship being rescinded.

Other Fee Remissions

Staff Remission

All employees are eligible for fee remission as indicated in the Staff Fee Remission Policies current at the time employment starts.

Sibling Discount

Parents with more than one child at St Margaret's receive a 10% fee remission applied to the eldest child. The remission of 10% associated with twins may in some circumstances apply to both children.

If three or more children attend the School. The 10% remission applies to all children.

Former pupils', Anglican Clergy and Services Personnel discounts

The above are all entitled to a 10% fee remission.

Other Sources of Financial 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 at the School. St Margaret's encourages parents/guardians to apply for support where it is felt a good case can be made for assistance.



www.stmargarets-school.org.uk

Merry Hill Road, Bushey
Hertfordshire, WD23 1DT
United Kingdom

+44 (0)20 8416 4400
schooloffice@stmargarets-school.org.uk