



Moon Hall Schools Educational Trust

Bursaries Policy

Governor Responsibility	Full Governing Body
Governor Lead	Chair of Governors
Status & review cycle	Biennial
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Date of next full review	July 2021

This Policy has been authorised by the Governors of Moon Hall Schools Educational Trust for publication to parents, prospective parents, and all members of the Trust's schools' staff. It is a summary of the Trust's Bursary Scheme and is subject to change from time to time without further notice. It, together with the Bursary Application Form and Guidance Notes, will be made available to parents and prospective parents on request and is also available on our school website.

General principles

The Trust's objective is to make available its educational provision to those who would benefit from it regardless of their individual means or circumstances. However, the cost of providing this specialist teaching is significant. The Trust does not benefit from any government funding save to the extent that in a few cases Local Education Authorities pay the fees of specific individual pupils. This means that the majority of the cost of providing education has to be met from fees paid by the parents. Wider access to the Trust's schools is provided by means of bursaries funded for the most part out of the Trust's Bursary Fund.

The Trust has long had a policy of broadening access to pupils whose parents do not have the financial means to pay the schools' fees. **The Trust's ability to continue in this fashion remains dependent, as it has always been, on the generosity of its parents, friends and the public at large in providing help in the raising of funds for its Bursary Fund.**

Most of the parents of pupils attending the Trust's schools have had to make considerable financial sacrifices in order to pay the fees that are necessary to provide the help their children need. The Trust will not take advantage of these parents by imposing any form of levy on fees in order to supplement the Bursary Fund. However, the Trust does encourage all parents, whether in receipt of a bursary or not, to help raise money for its Bursary Fund and so enable more children to benefit as their own children have done.

Places are made available to pupils whose needs can be met by the school and whose fees are paid by the Local Authority under a Education, Health and Care Plan (EHCP) and this may be material in the consideration of a bursary application.

The Trust reserves the right to seek independent verification of the information provided by those applying for a bursary grant.

Bursaries

Requests for financial support usually fall into two categories:

- New applicants to the School for entry in to either Junior or Senior School.
- Existing pupils in the School for pupils in the School whose parents unexpectedly fall upon hard times.

All Awards are subject to repeat testing of parental means each year and may be varied upwards or downwards, depending on parental circumstances. The Trust will not discriminate against any person on the basis of any of the protected characteristics described in the Equality Act 2010.

Bursaries are awarded at the discretion of the Board of Governors on the recommendation of the Bursary Committee. They will generally be for a full academic year at a time. Hardship bursaries, however, may be awarded from the beginning of any term.

The value of bursaries which can be awarded in any year is limited by the Trust's financial resources available to meet the running costs of the school so not every eligible application for a bursary will succeed.

Bursaries will be awarded either as a percentage of the fees for the relevant period or as a specific amount that will be credited to the fees account.

Unless specifically stated in the bursary award, the extension of a bursary from one academic year to the next will require a renewed application to demonstrate that the applicant still meets the eligibility requirements.

All bursary applications are treated in confidence. Pupils are not normally told by the school that their parents benefit from a bursary.

An offer of a bursary will be specific to the needs and circumstances of the applicant, to the provisions of the Trust's Bursary Policy and to any other conditions contained in the letter of offer.

Eligibility

All parents and prospective parents of pupils at the Trust's schools are eligible to apply for a Bursary. The Bursar will be able to provide more information and a copy of the Bursary Application Form and Guidance Notes.

In the case of prospective parents, an application for a bursary will only be considered after the School has determined that the pupil meets the School's requirements for Admission. In some cases it might be possible for the Bursar to indicate what a maximum bursary might be if those requirements were met and the financial criteria were met but the Bursar would not be able to indicate whether or not that particular applicant would be successful until a decision has been made.

New Applicants to the School

Eligibility for an award is assessed on the basis of the parents'/guardians' financial circumstances.

Bursary awards will be offered to pupils on entry who:

- Meet the School's normal entry and residence requirements
- Whose parents have demonstrated their inability to afford a full fee paying place
- Who have attended a maintained school¹
- May live in circumstances of economic or social deprivation
- Are British subjects²

We welcome applications from candidates from all ethnic and religious backgrounds, and from candidates with disabilities.

All applications for financial support are means tested. Applicants are required to submit evidence of their income, capital and other assets. All applicants (normally both parents) are interviewed by the Bursar who visits the candidate's home before the offer of financial support is confirmed. Means

¹ Occasionally an award may be made on grounds of hardship to a pupil coming from an independent school.

² Exceptions may occasionally be made.

testing is carried out annually (though not the interview or home visit) and levels of support will fluctuate with the parental income.

Awards are made towards the cost of the fees (including lunches and text books). The School will meet the costs charged by the exam boards for GCSEs, for those families in receipt of a bursary award of 50% or higher. Where the household income is less than £25,000 bursary award holders will also receive:

- a grant of £250 per year towards the cost of School visits/trips
- one free after school club per annum worth £225
- an initial grant of £300 (payable by BACS during the September that a pupil starts at the School), to cover the costs of equipment and sports clothing
- A 50% reduction in minibus travel costs

Existing Pupils at the School

Parents/guardians who unexpectedly fall on hard times are able to apply for a Bursary for a pupil already at the School at any stage of the academic year. In the first instance parents/guardians should make contact with the Bursar to explain the circumstances. The parents/guardians will be asked to complete the same Means Test Form as Award applicants and will then be invited to attend a meeting with the Bursar. It may also be necessary to carry out a home visit.

Bursaries are normally reserved for pupils who have already embarked upon either their GCSE course or are in Year 6 and who can then transfer to the State sector at Year 7.

The granting of any Bursary is subject to funds being available at the time of application.

The Bursary Committee will assess the merits of the application and make an assessment of both income and capital. The grant of a bursary is not influenced by the level of a child's ability but by the extent of the need. This includes the extent to which the child is likely to be able to take advantage of and benefit from the award. Bursaries are most likely to be awarded to pupils who will benefit the most from what the school has to offer and who will respond maturely and responsibly to the help that they receive.

The Bursary Committee will consider a number of factors when making a judgement as to the need for support and the extent of support.

- Financial
 - The Trust's available funds
 - Current earnings of the applicants in context with past and projected earnings
 - The ability of the applicants to improve those earnings (e.g. are both parents in full time occupation or are there good reasons why they are not such as incapacity, dependent children etc.)
 - Available capital and the possibility of releasing capital (e.g. by making use of equity value in a house).
 - Ability to borrow prudently to fund the fees.
 - In cases where the parents are separated, the contribution made by the absent partner.
 - The ability of the wider family to contribute towards the household costs or the school fees. In this respect for instance information as to the means of grandparents may be requested.

- Demonstration that payment of the school fees takes a high financial priority in the household expenditure budget. The following, for example, are unlikely to be consistent with the expectation of a bursary:
 - Expensive holidays
 - Expensive cars
 - Significant home improvements
 - Second property
 - Substantial equity in the family home which would support further borrowing.
- Educational need
 - The child's willingness to respond and benefit from the education being provided
 - The support of the child's parents or guardians for the child's education
- Other factors
 - The support by the child's parents or guardians for the school (e.g. payment of fees on time, membership of the Court Circle parents' association and other active contribution to the life of the school if reasonable to expect)
 - Evidence that the child will make or is making a positive contribution to the life of the school and is a good role model for other pupils
 - The willingness of the child's parents to provide a useful or valuable benefit in kind if they have the means and ability to do so and it would be reasonable for the school to ask for such help.
 - The social needs of the child.

All applicants will be required to complete a Bursary Application Form which includes a means questionnaire and to provide the supporting documentation requested. A home visit may be requested.

Applicants must make full disclosure of all material information relating to their financial circumstances. If material information is not covered by answers to specific questions in the Bursary Application Form it should be provided as a supplement.

Applicants must also provide the Bursar with any further supplemental information and supporting documentation requested. Questions should be answered in full. Applicants should take care that no relevant financial information is omitted and that their answers do not provide a misleading description of their true circumstances. The Bursar must be told of any material change in financial circumstances after the application has been submitted as soon as possible after that change.

Material information or a material change is anything that might affect a decision to grant or continue a bursary.

Failure to co-operate with a request for independent verification of relevant information could lead to a bursary that would otherwise be eligible being refused or withdrawn.

Failure to divulge relevant information or a change of circumstances could lead to a bursary being withdrawn and a liability to repay a bursary awarded on the basis of incomplete information.

Other conditions

Condition of Award - If a bursary award place is being accepted parents/guardians are required to sign a document agreeing to the School's conditions relating to that Award.

Annual Review - All Awards and Bursaries are subject to repeat means testing each academic year, using the same form as for the original application. These forms are sent out at the end of April each year and the completed forms, together with all supporting documentation, have to be returned by the end of May each year.

Confidentiality - The School respects the confidentiality of Bursaries granted to families and recipients are expected to do likewise.

A bursary granted will be repayable in full or in part for the academic year in question if the pupil concerned engages in serious misconduct, is expelled or removed from the school because of misconduct or is withdrawn from the school without a term's written notice having been given.

If a pupil's progress or conduct becomes such that the School feels the child is no longer benefiting from the bursary award or that there has been a serious failure to meet the factors taken into account in making the award, a bursary granted may be suspended, reduced or withdrawn if following a warning there is no satisfactory improvement.

A bursary granted may also be suspended, reduced or withdrawn if the child's parents fail to support the School, for example by making late payments of their contribution to fees and extra charges.

Other sources of bursaries

In addition to the Trust's bursary funds, there are other educational and charitable trusts which provide assistance. Further information can be obtained from:

The Educational Trusts Forum (www.educational-grants.org)