



MEANS-TESTED BURSARIES

General

The Governors of Luckley House School 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 80% on tuition fees payable, depending on the financial, compassionate or other pertinent circumstances of applicants. The School does not hold endowment funds to fund bursary support and so all funding is provided by other parents paying fees, due to this the award of support must be directed only where applicants can demonstrate need and are not otherwise able to fund a place and in addition such funding is available for that school year.

Bursary awards are subject to repeat testing of parental means each year and may be varied upwards or downwards, depending on parental circumstances.

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parents/guardians' circumstances has resulted in difficulty in meeting tuition fees and may result in the child being withdrawn part way through a stage of education.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's fees is included in:

- The School prospectus.
- The School website.

It is also recommended that parents/guardians informally contact the Bursar or Finance Manager to seek advice before any formal application as to the School's current Bursary support availability.

The Application Process

Bursaries may be made available to parents/guardians of children entering at Years 7, 8 or 9 i.e. the lower school, and into the Sixth Form at year 12 of Luckley House School. (See the School's Admission's Policy). They are awarded at the discretion of the Governors and the Head Teacher. School. The Bursary department are responsible for the management and co-ordination of the process.

- Step One. Parents/guardians seeking a bursary are required to indicate this on their registration form, submit by 30th September and pay the registration fee. In addition, the school requires potential bursary applicants to display commitment by attending an Open Afternoon, private tour, taster day or interview with the Headteacher.
- Step Two. Eligible applications will be assessed by Bursary Administration Limited (BAL). This assessment may include a home visit. BAL will then produce a report for the Bursar and Governors giving an indication of the likely level of support needed to allow the child to attend the School. Where it is likely that the financial resources required are beyond the capacity of the School then parents will have the choice to continue an application for a place without bursary support or to withdraw.
- Step Three. The Bursar prepares a recommendation which is considered with the Head and a joint recommendation is then reached.
- Step Four. By the end of February. The 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, Bursar and Governors 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 their 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.
- 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 focussed 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 savings balances, pension funds 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 absent parent
- Where fees are being paid to other schools (or universities) the School's grant will take the outgoings into consideration.
- While acknowledging that others might have a different view, the School considers that the following would not be consistent with the award of a bursary:
 - Frequent or expensive holidays.
 - Brand new or luxury cars.
 - Investment in significant home improvements.
 - A second property/land holdings.
 - Annual household income from all sources over £100k
- 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.

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 need to be set within existing budgetary constraints. Parents/guardians with a child at

the School whose financial circumstances suddenly change may apply for a bursary to the Bursar, explaining their situation. Such awards are to enable the completion of study to the end of that school year or to cover the completion of two GCSE years or sixth form, subject to the availability of funding and cannot be guaranteed.

Scholarship and Other Discounts

Where the award of a scholarship or other allowance is combined with Bursary Support then as Bursary Support is means tested it will reflect the net amount required to pay tuition fees after these have been applied i.e. a Bursary of 50 % would be reduced to 40% should a Scholarship of 10% be awarded.

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 at the beginning of March each year for return by the end of the month. For those previously in receipt of bursaries, the Head Teacher and Bursar, in making their joint recommendation to the Governors, 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 fees and other charges incurred during the school year.

Disclosure

The School expects that all requested information to support the award or continuation of bursary support to be provided promptly and reserves the right to withdraw support where this is not forthcoming or it is determined that false or misleading information has been provided to obtain bursary support.

Discount

Bursary awards apply to tuition and boarding fees only – not charges for food or books. Extras must be paid in accordance with the Terms and Conditions of the School. Any extras above £300 to be incurred on behalf of a pupil in receipt of a bursary award for a trip or event should be approved by the School before a commitment is made.

Confidentiality

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

The document will be reviewed annually each July.