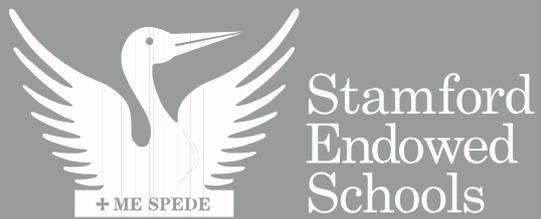


Bursary Policy



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SES Bursary Policy The Bursary Policy is intended to be a public document. The section on 'how to budget for bursaries' is for internal use.

Stamford Endowed Schools Policy for Means-Tested Bursaries

Introduction

Enabling bright, young people from all backgrounds to be educated at the Stamford Endowed Schools (SES) is vital to the spirit of inclusivity and opportunity that is core to our ethos. We are extremely proud of the social diversity at Stamford and believe it is one of the unique features that make the SES so special. The Governors of the SES are committed to broadening access to the schools by offering financial support with the payment of school fees through the provision of bursaries to help fund the fees of talented pupils with clear potential who will benefit from the education opportunities offered by our two senior schools, Stamford School and Stamford High School ("the Schools"). For parents on low incomes there may be a discount in exceptional circumstances of up to 100% of tuition fees plus help with extras. The award of bursaries also play a role in maintaining the size and scope of the Schools. In principle, bursaries are not awarded to pupils at Stamford Junior School or to boarding pupils from overseas.

All bursaries are means-tested in order to ensure that the finite funds allocated each year to the SES bursary programme are correctly prioritised, appropriately distributed and focused on the most deserving cases. In order to address fairly the requests from parents and families for financial support, it is important that the process laid down in this policy is followed in a transparent and timely manner. Bids which fall outside the articulated process are likely to attract a lower priority.

Bursaries are subject up to an annual review and parents will be asked to provide updated financial information as part of this process. The review may lead to the means-tested support being adjusted upwards or downwards, depending on changes in financial, parental or family circumstances.

The Case for Assistance

The Principal, the respective Heads and Director of Operations 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 pupils 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. Good conduct and continuing good performance will be a pre-requisite for the continuation of a bursary throughout the education of a pupil.
- **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 SES's ability to fund these within the context of what is affordable 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 SES 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 award 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 dependants, 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.
- Contribution made by an absent parent in cases of separation.
- Contribution to household costs by other, wider, family members such as grandparents, step parents, aunts and uncles, 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 other schools might have a different view, the SES consider 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.
 - In general, attendance on expensive and/or overseas trips.
- **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 SES.
 - 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 one of the Schools, adding to the stress of coping with the parents/guardians separating.
 - Where there is a single parent.

Categories of financial support

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 significant 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 key stage of education.**

New Applicants to the Senior Schools

Awareness: Information provided by the Schools informing the parents/guardians of potential pupils to the possibility of gaining means-tested financial support with the payment of schools fees is included in:

- **The Schools' prospectus.**
- **The Schools' website.**
- **The local press by means of advertisements.**
- **The Registration process coordinated by the Registrar and Admissions Office.**

The Application Process for New Pupils

Bursaries may be made available to parents/guardians of children entering any year-group of The Stamford Endowed Schools (See SES Admission's Policy). The Principal, Heads of the two

Schools and the Director of Operations are responsible for the management and coordination of the process.

- Step One.
 - Parents request a Bursary application pack from the Schools' Admissions Office. Whilst packs can be requested at any time, the application will not be assessed until the pupil for whom a bursary is being applied has been formally registered with the SES and the Registration Fee paid.
 - Parents/guardians seeking a bursary are required to complete an application form which seeks to establish the financial circumstances of the household. The Form and Guidance Notes which request details of income and capital, must be accompanied by the full documentary evidence requested. They are attached at Enclosures 1 and 2.
 - There will be strict timelines to be followed, which will be published each year for entry at the start of the next Academic Year. Applications will be placed into three tranches, with the highest priority being afforded to applications received in the first tranche. Tranches and deadlines for submissions are as follows, with all dates being for the Academic Year preceding the Proposed Academic Year of Entry for the new pupil.

	Applications	Assessments	Awards
Tranche 1	1 st September to 23 rd November	December/ January	February
Tranche 2	24 th November to 9 th February	February/ March	March
Tranche 3	10 th February to 31 st August	April to August	April to August

- The completed forms, together with the necessary documentary evidence (as copies not originals), are to be submitted to the Finance Office by Registered Post or by hand, with a signature or receipt of documentation being obtained. The Schools take no responsibility for the loss of submissions not processed in this way.
 - For applications received more than one year before the pupil's proposed Academic Year of Entry, the Finance Office may at their discretion, agree to assess the application and provide indicative advice on the likely success and amount of a potential bursary award. This indication is not binding and an updated application in the Academic Year before entry will still be required to form the basis of a formal assessment and potential offer.
- Step Two.
 - The Finance Team will oversee the process to assess all applications to establish the likely level of support which will be required in order to enable potential pupils to attend the Schools. This may involve a separate assessment, including a home visit, by an external firm, Bursary Administration Limited, who are discrete, experienced and well recommended in the Educational Sector.
 - The Head of Finance, will then make a firm recommendation as to whether an application has been successful and, if so, the level of bursary to be awarded.
 - This recommendation is passed back to the relevant School for consideration by the Head.
 - Step Three. Coordinated by the Admissions Office, the parents/guardians will be invited for interview with the relevant Head of School to discuss and confirm the outcome of their bursary application. Following this interview the Head will make a final bursary offer as appropriate. If this differs from the recommendation of the Finance Team by more than £2k it will be reviewed by the Principal.
 - Step Four. On offer of a bursary, parents/guardians are required to sign and return a letter of acceptance relating to the place at the relevant school and an acknowledgement agreeing to the Conditions of the Award of a Bursary.

Entry into the Senior Schools from Stamford Junior School.

Pupils from Stamford Junior School currently have automatic entry to Stamford School and Stamford High School and are not required to sit the Entrance Examination for the senior schools. It is of great benefit to pupils in the final year of the junior school that they are able to enjoy a full year of teaching without the pressure of examinations.

Bursarial assistance is not available for pupils whilst they are at Stamford Junior School, although application for a bursary can be considered upon transition to the senior schools. There should be no expectation that bursarial support will be awarded and any applications will be considered objectively. Bursary applicants undertake rigorous means-tested screening and there will be a requirement for your child to sit the Entrance Examination as part of the assessment process.

Existing Pupils at the Senior Schools - Change in Family Circumstances

The SES will, in normal circumstances, set aside each year funds 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. Parents/guardians with a child at the School whose financial circumstances suddenly change may apply for a bursary to the relevant Head of School, explaining their situation and using the forms at Enclosure 1. Such awards are subject to the availability of funding and cannot be guaranteed.

This process will be overseen and coordinated by the respective School, with the necessary financial assessment being made by the Director of Operations and Finance Manager.

Applications for such Bursaries should be initiated through the relevant Head of School in the first instance.

Annual Review

Under the Conditions under which all bursaries are awarded, they will be subject to repeat assessment of parental means on an up to annual basis and may be adjusted upwards or downwards depending on changes in financial, parental or family circumstances. Current bursary holders may be issued with repeat means-assessment forms around Easter of each year for assessment that Summer. This process may involve a separate and external assessment, including a home visit, by the firm, Bursary Administration Limited.

For those previously in receipt of bursaries, the Principal or Director of Operations have the discretion, after consultation with the respective Head, to reduce or withdraw 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 the fees. Equally and following the principle of fairness, if parents/guardians do not engage with this Review process in a timely and pro-active manner then the Bursary awards for their child/children may be adversely affected.

Confidentiality

The Schools respects the confidentiality of bursary awards made to families and recipients are expected to do likewise. A breach of confidentiality could place in jeopardy an award of a bursary.

Other Sources of Bursary Assistance

In addition, grants for assistance with tuition fees are sometimes available from outside sources such as educational and charitable trusts. The Schools expect that alternative options, such as those published on the Educational Trusts Forum web-site, are explored in conjunction with a bursary application and that evidence of such is submitted with the application. More information on these alternative sources of funding are attached at Enclosure 3.

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Review: August 2020

Enclosures:

1. Stamford Endowed Schools: Means-Tested Bursary - Financial Circumstances in Support of an Application for a Grant.
2. Guidance Notes for Completion of the Application for a Grant.
3. Educational Trusts Forum Information Sheet.

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