

OUNDLÉ

School

Policy and Guidelines for Bursary Help

A Introduction

Oundle School (the School) is committed to broadening access by offering means-tested financial support to assist the payment of school fees to eligible parents/guardians. Such support is known as a *Bursary* which may be awarded to assist the payment of fees up to 100% of tuition and boarding fees, depending on the financial or other circumstances of applicants.

Applications for financial support usually fall into two categories:

- **Entry Bursaries** - are available for new applicants to the School, where parents/guardians are unable to fund fully the fees. Some of the available funds are set aside for 100% 'life-changing' awards for children from disadvantaged backgrounds. As funds are limited the focus of distribution is on those children who are in the best position to contribute to and gain from an Oundle education. As part of the process for determining recipients of bursary awards children are interviewed and undertake NFER Verbal and Non-Verbal reasoning tests; feeder schools are also approached for confidential references. All awards are conditional on recipients meeting the School's entry standards.
- **Emergency Bursaries** – are available for parents/guardians of existing pupils where a change in financial or personal circumstances has created a difficulty in paying the fees. Financial help may be offered generally in the form of a short term award designed to allow the child to remain a pupil at the School until a 'natural break' point in his/her education is reached.

Awareness

The School provides information to alert parents/guardians of potential pupils to the possibility of gaining means-tested financial support to assist payment of schools fees in:

- The School prospectus
- The School website
- Other media - by means of advertisements

Extras

Bursary awards apply to tuition and boarding fees only. Extras must be paid in accordance with the terms and conditions of Oundle School. Any extras above £100 to be incurred on behalf of a pupil in receipt of an award for a trip or event should be approved by the Finance Bursar or Undermaster before a commitment is made.

B The Application Process

New Applicants to the School

Entry Bursaries are available to parents/guardians of children entering the First, Third and Lower Sixth Forms of Oundle School and years 4, 5 and 6 at Laxton Junior School. The process is managed and coordinated by the Bursaries Committee on behalf of the Headmaster and Bursar. Decisions on awards are communicated by the Undermaster.

Suitability

Academic achievement and potential are central to assessing a child's suitability. Attention will be given to the academic assessment result of each applicant. Bursary funds are limited and children judged most suitable will be given priority alongside those likely to gain most from the educational provision. Pupils to whom support is offered must be likely, in the opinion of the Bursaries Committee, to make sound academic progress following admission, and possess the potential to develop the quality their work, and benefit from participation in the wider, extra-curricular activities on offer at the School. Each applicant should meet easily the School's normal academic requirements. Previous school reports will be consulted for evidence of achievement, potential and good behaviour.

Step One

Parents/guardians seeking a bursary are required to complete an application form, *Declaration of Means*, which is confidential and seeks to establish the financial circumstances of the household. The form, which requests details of income, expenditure and capital, is to be accompanied by full documentary evidence. The completed form, together with the necessary supporting documentary evidence, is submitted to the Undermaster no later than the date of the Entrance Exam in any year for bursaries to be operational for the following September. It is expected that the process will start between two years and eighteen months before entrance for the majority of applicants.

Step Two

Completed financial assessment forms are passed to the Finance Bursar who assesses all applications in order to establish the likely level of support required for the child to attend the School. This process may involve the parents visiting the School for a meeting, or a School representative visiting the parents'/guardians' home, to ensure the information has been correctly interpreted and the basis of the financial assessment has been fair. The

Finance Bursar prepares a recommendation in accordance with the Oundle School Scale of Awards. This is considered with the Undermaster and a recommendation is then presented to the Bursaries Committee for approval.

Step Three

Parents are advised whether or not their child is to be offered a Bursary subject to the child satisfying the admissions criteria of the School at the time. Parents are required to sign a letter accepting the offer which accepts the conditions relating to the bursary.

Existing Pupils - Change in Family Circumstances

Within overall budget funding, the School will in normal circumstances set aside each year an Emergency Bursary 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 an *Emergency Bursary* to the Finance Bursar, explaining their situation and using the standard application form. Such awards are subject to the availability of funding and cannot be guaranteed. Emergency Bursaries will also be awarded on a temporary basis and will not be guaranteed for the remainder of the pupil's education at Oundle School.

C Criteria for Award

The Bursaries Committee considers a number of factors when assessing a Bursary request including the child's suitability for accessing an Oundle education. The Committee makes a judgement as to the justification for financial support, and the extent of such support.

Financial Limitations

The size of the bursary award is not influenced by the level of the academic ability of the child but by the extent of the 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 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. Approved pension funds are not included within a parent's

assets, however non-approved pension savings will be taken into account in the award calculation.

- In cases of separation, the contribution made by the absent parent.
- Contribution to household costs by other, wider, family members, any adults unrelated to the child or by outside sources.
- 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 or 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 (however, it is important to note that because one child is supported by the School it should not be assumed that subsequent siblings will be).
- 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.

D Annual Review

Bursary awards are subject to an annual assessment of parental means and the size of the Bursary may be varied upwards or downwards depending on any change in parental circumstances. Awards are made on the basis of the Oundle School Scale of Awards, which determines the level of award in relation to the family's financial circumstances. The Scale of Awards is reviewed and revised annually by the Finance Bursar and Undermaster to take into account any changes in fees. Though awards are generally tied to this scale, they may be varied upwards or downwards depending on individual parental/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).

Compassionate or other considerations may affect the size of the awards in exceptional 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 Undermaster and Finance Bursar, in making their joint recommendation to the Bursaries Committee, have the discretion to recommend to the Headmaster 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 the fees.

E General Information

Confidentiality

The School respects the confidentiality of bursary awards made to families and recipients are expected to do likewise. Any breach of this confidentiality may be deemed to be a breach of the conditions of the bursary award which may result in the withdrawal of the award.

Other Sources of Bursary 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. Oundle School encourages parents/guardians to apply for support where it is felt a good case can be made for assistance. Further information on how to pursue such assistance may be obtained from:

The Educational Trusts Forum *and also* The Joint Educational Trust
6 Lovat Lane
London EC3R 8DT
Email: admin@jetcharity.org
Website: www.jetcharity.org

Appendix A

Conditions of Award

1. **Obligations of the pupil:** A pupil who is the subject of an award is required to work hard, to contribute positively to the life of the School, to be a credit to the School and to set a good example to other pupils. These are the *Purposes of the Award*.
2. **Obligations of the Parent/s:** The parents are expected to support and encourage the pupil to achieve the *Purposes of the Award* and to uphold the aims and the good name of the School. The parents are also required to pay the balance of the account by the first day of the relevant Quarter and to inform the Finance Bursar, in writing, of any change in their financial circumstances from those given when applying for the Award.
3. **Withdrawal of the Award:** The Award may be withdrawn by written notice sent to a parent if, in the opinion of the Bursaries Committee and the Headmaster, acting in good faith, the pupil or a parent has not complied with the obligations set out in paragraphs 1 and 2 above or the pupil has fallen below the required standards of conduct and progress and in the further opinion of the Bursaries Committee and Headmaster there has been no significant improvement following consultation with a parent and/or the pupil and a written warning. Withdrawal of the Award will take effect from the start of the next Quarter in which fee accounts are payable.

Further, the Award may be withdrawn by written notice if the balance of the account remains unpaid 28 days after a written reminder has been sent to the parents.
4. **Annual Review:** Other than an Emergency Bursary when the period is likely to be shorter, an award is normally tenable throughout a pupil's time at the School. It is, however, subject to an annual review of financial circumstances and should these change significantly from the present position, the Award may be varied or discontinued.
5. **Repayment events:** Parents shall be required forthwith upon written notice to repay all or part of the benefits they have received under the Award in any of the following circumstances:
 - a) up to the benefits received for one School year if the pupil has engaged in serious misconduct or has been expelled or removed for reasons of misconduct by the requirement of the Head acting in good faith;
 - b) up to the benefits received for one School year in a case of the pupil being withdrawn for any reason during a school Quarter without notice having been given in accordance with clause 5 of the Standard Terms and Conditions;

- c) up to the benefits received for one School year if the parent has failed to inform the Finance Bursar of any change in their financial circumstances within a reasonable time of such change occurring.
- 6. **Fees in lieu of notice:** For the avoidance of doubt, the benefits payable under an Award do not apply to any Quarter for which the School has required payment of fees in lieu of notice.
- 7. **Standard Terms and Conditions:** These Conditions of Award take precedence over any of the School's standard terms and conditions which are inconsistent with them but in all other respects the standard terms and conditions as amended from time to time shall apply and these Conditions of Award shall be interpreted in accordance with them.

Appendix B

Acceptance Slip

We accept the offer of the award of a Bursary, along with the conditions set out in the Conditions of Award which we have received.

Name of Child

Date

Signature of Father / Guardian

Signature of Mother / Guardian

Please note an acceptance slip will be sent out with any offer of bursary support and must be returned for the award to be finalised.