

# **KING EDWARD VI SCHOOL, SOUTHAMPTON & STROUD SCHOOL** King Edward VI Preparatory School

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## **BURSARIES POLICY**

### **Aims**

1. The aims of this policy are:
  - 1.1. to widen pupil access to King Edward VI School and Stroud School (the 'Schools') from a broad spectrum of society;
  - 1.2. to continue and extend King Edward VI School's long tradition of providing public benefit;

### **Introduction**

2. Stroud School Limited is wholly owned by King Edward VI School, a registered charity that is committed to providing significant public benefit. Both Schools are aware of their obligations under the Charities Act 2011 and the Charity Commission's guidance and seek to adhere to the public benefit principles identified by the Charity Commission. This policy is reviewed on an annual basis to take into consideration the latest guidance from the Charity Commission.
3. King Edward VI School has a long history of providing financial assistance to pupils and their families. While the costs of running the School require that those who can pay full fees must do so, every year King Edward VI School foregoes in excess of 6% of total fee revenue through bursaries, scholarships and studentships.
4. The Schools' Bursary Scheme is for the parents of new pupils with the purpose of providing ongoing support during the time that their child is a pupil of each School up to the level of support required on entry into the School subject to the parents' continuing compliance with the terms and conditions of the bursary award and the level of bursary funds available. The Scheme is designed to assist prospective parents on low incomes who for financial reasons might otherwise be unable to send their child to the Schools.
5. Bursaries are discretionary, entirely means tested and are awarded on an annual basis only to parents who are financially eligible and who meet the application requirements. Due to the limited financial resources of the Schools not every eligible application for a bursary will be successful.
6. All bursary applications are treated in the strictest confidence. Pupils will not be made aware that they benefit from a bursary unless informed by their parents.
7. Approximately 5% of the pupils at King Edward VI School at any one time have historically benefited from a means-tested award with over 40% of these being up to 100% of fees. In 2007 the Governors established The King Edward VI School Southampton Foundation (KES Foundation) to work with the senior school and the Old Edwardians' Association with the primary aim of improving access to King Edward VI School by providing a continuous and sustainable level of financial support for bursary development.

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**Publicity**

8. We view a socially diverse pupil population as a key component of a full and balanced education. The availability of bursaries to the Schools is advertised locally and in line with the Schools' objects.

**Eligibility and Procedure**

9. Prospective parents of pupils at the Schools are eligible to apply for a bursary, and should contact the Assistant Head (Registrar) in the first instance for more information.
10. All applicants for any bursary are required to complete a means questionnaire. The questionnaire is designed to provide a full picture of the income and assets of applicants so that each School's Selection Panel can determine those to whom an offer of a bursary would be most beneficial. Please note that families who may be classified as 'low income' but have substantial assets may be ineligible to receive a bursary.
11. In order to have their application for a bursary considered by the Selection Panel, parents must complete the questionnaire and provide the Bursar with any supplemental information that is requested. It is critical that parents answer all of the questions carefully and in full. All bursaries are subject to a yearly means-test review and a further review may be required from time to time if deemed necessary by either School. Nevertheless, should any of the information disclosed in response to the questionnaire become inaccurate at a later date, the School must be informed in writing without delay. For example, should the financial position of parents with a pupil already at the School worsen unexpectedly, they should contact the Bursar as soon as possible so that a way forward can be agreed. Similarly, if a parent's financial position improves they must inform the Bursar as soon as possible. Failure to divulge requested information or a change in circumstances to the School could lead to the recipient being disqualified from receiving bursarial assistance with immediate effect and/or action being taken in accordance with section 17 below.
12. Consideration will be given to the ability of the parent(s) to improve their financial position or earning power. 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 secondary school age or other dependents, or the requirements of their partner's work. Notional income would be assumed for the purposes of calculating the bursary award on a case by case basis and is unlikely to be less than £8,000 without good cause.
13. Admission bursary applications are considered by each School's Selection Panel during the Spring Term. Where candidates take the entrance examination for 11+ and 13+ places the Clerk to the Governors will notify applicants whether they have been successful by letter normally within five weeks of the date of the examination. For other candidates this notification will normally take place within two weeks of the applicant's interview.

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Successful applicants will be sent a letter of offer specifying the conditions of award and requiring them to complete and sign an acceptance form.

14. The deadline for admission bursary applications will vary and is published annually on the Schools' website. At 11+ and 13+ it is normally in the last two weeks of the Autumn Term prior to the year of entry. For 16+ the deadline is normally in the last week of January prior to the academic year of entry.
15. Applications by parents of existing pupils for assistance on the basis of hardship should be directed in the first instance to the Bursar who may at his absolute discretion make an application to an external trust.
16. Applying for a bursary will not prevent parents of pupils or of prospective pupils from applying for a scholarship, studentship or other award in respect of their children.

**Provision of information by parents**

17. Bursary funds are limited and the Schools have a duty to take all reasonable steps to ensure their correct allocation. It is expected that parents shall exercise integrity and honesty at all times when making an application for a bursary or in complying with their continuing obligation to disclose immediately any information which may affect the making of an award or its continuation. A bursary award would not be knowingly given by either School in cases where an applicant has not or would not fulfil these expectations.
  - 17.1 Either School may at its discretion request additional information from parents at any time. Any such request will be made in writing by the Bursar. The School will only request information it believes to be relevant to the application for or continuation of an award of a bursary.
  - 17.2 The following circumstances, although not exhaustive, may give rise to either School terminating the award and/or requiring repayment of all or part of an award together with interest and costs and/or requiring the removal of the pupil from the School:
    - 17.2.1 Parents knowingly or otherwise providing information to the School in connection with the award of a bursary or application for such an award which is subsequently found to be false;
    - 17.2.2 Parents failing to provide all relevant information promptly or at all as reasonably required by the School in connection with the award or application for the award of a bursary;
    - 17.2.3 In addition to 17.2.1 and 17.2.2 above parents should be aware that obtaining a bursary by fraudulent means is a criminal offence. In such circumstances either School may seek prosecution.

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- 17.3 Conditions for the termination or repayment of an award are more fully set out in the Conditions of Award issued by the Schools with a letter of offer of the award of a bursary.

**Bursary and Hardship Awards**

18. Each Bursary offer will reflect the particular circumstances of the recipient and be expressed as a sum in £'s as a contribution towards tuition fees. Admissions bursaries remain subject throughout the period of the award to the conditions of award provided with the letter of offer. Hardship support may be awarded on a termly basis or other fixed period of no greater than one academic year depending on the circumstances surrounding the provision of the award. A fresh application is required for each academic year at the absolute discretion of the Bursar and no assumption should be made by the recipient of an initial hardship award that a subsequent application will be made by either School or if made that it would be awarded by the external trustees or from the KES Foundation.
19. For clarification scholarships at the senior school (and at the preparatory school from September 2018) are not means tested. When awarded by either School, the amount of any academic scholarship award will be taken into account when calculating the total of any additional means tested support required from a bursary.
20. All bursaries are paid at the absolute discretion of the Schools and are subject to periodic review by the Schools as set out in Section 11 above. Acknowledging that others might have a different view, the Schools consider that the following would not be consistent with the receipt of a bursary:
- Frequent or expensive family holidays or school trips.
  - New or luxury cars.
  - Investment in significant home improvements.
  - A second property/land holdings.

Revised November 2012

Reviewed: November 2013

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