DAVENIES

Bursary Policy

Introduction

The Governors of Davenies (the 'School') are committed to broadening access to the School in Years 7 & 8 by offering to eligible parents/guardians means-tested financial support with the payment of schools fees. Such support is known as a 'Bursary' and these may be awarded, at the absolute discretion of the Governors, in the form of a discount of up to 85% on tuition fees payable.

Bursaries are subject to annual review and changes in financial circumstances may result in appropriate adjustment in the level of Bursary offered the following year. Awards are made on a discretionary basis and the School cannot guarantee an increase in funding if the family circumstances change. The scale of any award is approved by the Bursary Committee which is made up of Senior Leadership Team (SLT) members, and reports to the Governors: Finance and General Purposes Committee.

For the purpose of this Policy, parent has the same meaning as parent in the School's *Parent Contract – Terms & Conditions* and means any person who has signed the Acceptance Form as a holder of parental responsibility for the child at the School.

Requests for financial support usually fall into two categories:

- New applicants to the School, where a place has been offered but parents are unable to fund the tuition fees.
- Existing pupils where a change in parents' circumstances has resulted in difficulty in meeting tuition fees and may result in the child being withdrawn part way through a stage of education. Please refer to the School's *Hardship Policy*.

Information about possible support through a Bursary is included on the School's website.

Bursaries may be made available to parents of children entering Davenies in Year 7 (please refer to the School's *Admissions Policy*) and are awarded at the discretion of the Governors and the Head. The Bursar is responsible for the management and coordination of the process.

Application Process

1. If the parents meet any of the following criteria they should not apply for a Bursary as their application for a bursary will be rejected:
   - A gross family income in excess of £100,000 when the family (or a parent) has one child attending an independent school or expecting to attend an independent school.
   - A gross family income in excess of £120,000 when the family (or a parent) has two children attending an independent school or expecting to attend an independent school.
   - Savings / investments in excess of £35,000.
   - If the parents main property (less the mortgage) is worth more than £600,000.
   - If the parents own a second property.

   The School cannot guarantee that every application for support will be successful; eligibility does not guarantee a Bursary will be awarded. 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.

2. Applications for a Bursary are accepted from any family whose child has been offered a place at the School or is currently a pupil at the School. An application for a new Bursary must be made in writing to the Bursar as soon as possible after an offer has been made. Bursaries are allocated in early March with the exception of hardship cases where there has been a change in a family's financial circumstances which may occur at any time of the year (refer to *Hardship Policy*). Where the application is for a new pupil, the School will hold the requirement to accept the place until the outcome of the bursary application is known.

3. The School uses a third party to assess the applications in order to establish the likely level of support which will be required in order to allow the pupil to attend the School. This assessment may involve the assessor visiting the parents' home to ensure the information has been correctly interpreted and the basis of the financial assessment has been fair.

4. All applications will be assessed by the Bursary Committee with reference to the amount set aside by the Governors of Davenies each year for Bursaries. The Bursary Committee will have full discretion in allocating the Bursary funds. The decision of the Bursary Committee is final and not subject to review.

5. The parents are notified after the Bursary Committee meeting whether their bursary application has been successful and if so the level of the Bursary.

6. For a new pupil the parents are required to sign a letter accepting the place at the School and an acknowledgement agreeing to any conditions relating to the Bursary. For an existing pupil, the parents are required to sign a letter acknowledging and agreeing to any conditions relating to the Bursary.

The Case for Assistance

The Bursary Committee will consider a number of factors when exercising their judgement whether grounds for support exist and, if so, the extent to which support should be offered. Usually, the suitability of the child 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 of each applicant in so far as they can access the School's curriculum (refer to *Admissions Policy*), 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 benefit 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. 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 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 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 bursaries are well focussed and so, as well as current earnings, other factors which will be considered in determining the necessary/appropriate 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 capital savings 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 both parents.
- Contribution to household costs by other, wider, family members, any adults unrelated to the child or by outside sources.
- Other educational outgoings, in particular fees paid to other schools or universities.
- 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
  - Lifestyle that in the view of the third-party assessor is not consistent with attracting a bursary, for example a review of the bank statements reveals a high level of discretionary spending on eating out, clothes, entertainment, etc
  - New or luxury cars
  - Investment in significant home improvements
  - A second property/land holdings
  - Attendance on optional school trips (e.g. residential sports and/or cultural tours). These must be discussed with the Bursar prior to committing.
- 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, the School will provide a maximum of one 85% bursary place for that family.
  - Where the social needs of the child are relevant.
  - Where a parent is unable to secure permanent employment due to poor health or terminal illness.
  - Where a separation has resulted in the child having to be withdrawn from the School, thus adding to the stress of coping with the parents separating.

Existing Pupils - Change in Family Circumstances

The School will, in normal circumstances, consider Hardship Applications 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 with a pupil at the School whose financial circumstances suddenly change may apply for Hardship to the Bursar, explaining their situation. Such awards are subject to the availability of funding and cannot be guaranteed. Please see the School's *Hardship Policy* for further information.

Bursary Review

All Bursaries are subject to repeat testing of parental means each year, which may result in appropriate adjustment in the level of bursary depending on parental circumstances. Current bursary holders will be issued with repeat means-testing forms at the beginning of December each year for return by a specific date as directed by the Bursar. Applications received after this date will not be considered for a bursary. In addition, the Bursary Committee require that applicants cooperate fully by providing comprehensive and accurate information for the assessment and making arrangements promptly for a home visit by a third-party company if required.

For those previously in receipt of bursaries, the Head and Bursar, in their discussions with the Bursary Committee have the discretion to recommend 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 have failed to support the School, for example by the late payment of any contribution they are making to the fees. Any withdrawal of an award will take place with effect from the start of the following term.

Under exceptional circumstances, the School may require parents in receipt of a bursary to submit additional mid-year information when more up to date financial information/details becomes available, such as P60's issued by employers post April year end.

Confidentiality

The School respects the confidentiality of bursary applications and awards made to families and recipients are expected to do likewise. The obligation to make full disclosure of any change in circumstances pertinent to eligibility for the existing award is binding upon signing the award acceptance letter. If the School becomes aware or is made aware that the information provided is not accurate the bursary may be amended or terminated the following term. In all circumstances parents are bound by the *Parent Contract - Terms & Conditions*, including the requirement to give a full term's notice if a child is to be withdrawn from the School.

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 feepaying school and due to a change of circumstances may be unable to remain. Davenies encourages parents to apply for support from these trusts where it is felt a good case can be made for assistance.

Conclusion

Bursaries are awarded without any legal obligation to repay them however we would be most grateful if parents would consider repaying all or part of the Bursary received, when and if their circumstances allow. There are limited funds available for bursaries, and any repayment of funds would help the School to offer financial assistance to future applicants.

Data Protection

For information regarding the collection, processing and retention of personal information, in particular sensitive information provided as part of a Bursary application, please see the School's *Data Protection Policy – Data Retention Policy.*

Other Policies & Review

This Policy should be read in conjunction with the following other school policies and documents, which are available on the School's website, or upon request from the School Office:

- Admissions Policy
- Attendance & Registers Policy
- Behaviour Policy
- Complaints Procedure
- Data Protection Policies & Notices
- Equality Policy
- Hardship Policy
- Parent Contract – Terms & Conditions
- SEN and Learning Difficulties Policy

This Policy is reviewed annually, or upon changes to the Bursary application or review procedures.

Written: **Lent Term 2025, Bursar**
Review: **Lent Term 2026, Bursar**