SHREWSBURY HOUSE SCHOOL
FOUNDED 1865

BURSARY POLICY

Policy owner:	Bursar
Approved by:	Governors' Finance Committee
Date of last review:	September 2023
Next review:	September 2026

General

Bursary awards are means tested and relate to fees affordability. They are open, by application, to those whose boys pass our selective entrance assessment or to existing parents/guardians whose financial circumstances change.

Bursaries

Shrewsbury House School is committed to providing an exceptional education to any pupil who fulfils the entrance criteria, regardless of social or demographic background.

The Governors are committed to widening access to the School by offering means-tested financial support to eligible parents/guardians of those families whose children, whilst being of the ability and personality to thrive at the School, may not have the means to be able to afford to send their children here. Such an award is termed a 'Bursary' and up to 100% remission of tuition fees may be awarded subject to means-testing.

Fee assistance may be offered to parents who are able to demonstrate to the Governors, Executive Head and Bursar that they cannot pay full fees. There are bursaries available at all entry points.

In some cases, the parents or guardians may not have considered Shrewsbury House School for their child's education due to the perceived barrier of the level of fees and bursary awards are made available to remove this barrier.

Bursary awards are discretionary and subject to the financial resources of the School and approval by the Governors. Awards are made on the basis of a number of different factors and will depend on individual parents'/guardians' financial 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 pertinent considerations. As a guide, families with a gross household income of £100,000 pa or less, savings and/or investments of £30,000 or less and equity in their properties of £500,000 or less may be eligible for a bursary.

What does the bursary cover?

The bursary will cover or part-cover the tuition fees only. The Governors may consider waiving separately, at their sole discretion, costs to cover or part-cover educational trips, co-curricular clubs, uniforms and bus fare (on the School bus).

If parents are not in receipt of a 100% bursary award, any outstanding termly fees are required to be paid in accordance with the School's terms and conditions.

On acceptance of an offer of a School place, a deposit is also payable. Where parents are in receipt of a 100% bursary award, the Governors may use their discretion on a case-by-case basis to waive a proportion of the deposit.

1. New Applicants to the School

The Application Process

Bursaries may be made available to parents/guardians of children entering any year group of Shrewsbury House School. They are awarded after consideration by the Executive Head and the Bursar, in consultation with the Governors.

Step one

Parents/guardians seeking a bursary are required to register for a place at Shrewsbury House School and their son will be academically assessed. They should inform the Registrar during the registration process that they are seeking a bursary. If the student reaches our selective assessment criterion the parent may then move to step two.

Step two

Parents/guardians must complete an application form, which seeks to establish the financial circumstances of the household. The form, which can be obtained from the Bursar, requests details of income and capital, and must be accompanied by full documentary evidence. The completed forms, together with the necessary documentary evidence, are to be submitted no later than the **1st January** in any year for bursaries to start the following September. All applications are assessed in order to establish the likely level of support which will be required in order to allow the child to attend the school.

Information is required from both parents and from anybody else contributing financially to the household. Where both parents live at the same address, only one application form should be completed. Where parents are separated or divorced, both parties should fill in separate application forms detailing the financial contribution made by all members of both households. The School will take into account the cost of maintaining two households. When an application is being made as a single parent, the school will need evidence that the child's other parent is deceased or the absent parent has no financial responsibility (of any sum) for the child.

Shrewsbury House School currently uses Bursary Administration Ltd (BAL) to support the financial assessment of bursary applications. BAL is registered as a Data Controller with the Information Commissioner's Office. Parents will be expected to provide a full financial disclosure to BAL, who may also arrange a home visit as part of the assessment process to ensure the information has been correctly interpreted and the basis of the financial assessment has been fair. To view their website please visit www.schoolbursaryguide.com. The School may vary its procedures, from time to time, with regard to any such external validation and will inform any applicants of this.

Step three

The Executive Head and the Bursar will consider the external report based on the financial assessment alongside our academic assessment for selective entry requirements. There may be additional pastoral or supporting information, for consideration, offered or known to the School. The Executive Head and the Bursar will consider the award within an annual bursary budget, which is set and reviewed by the Governors. All applications will be discussed with Governors and any awards agreed by the Governors.

Step four

Parents/guardians are advised of their suitability for an award. This process will be completed by **31st March**. On accepting a place at the school, parents/guardians are then required to sign the Terms and Conditions accepting the place at the school and an acknowledgement agreeing to any conditions relating to the bursary. Parents/guardians will also be required to pay the deposit, unless waived in part, on acceptance of the place.

The Case for Assistance

The Executive 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. 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 allocated budget. 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. Each pupil to whom support is offered must, in the opinion of the Executive Head, be likely to make sound academic progress following admission and possess the potential to develop the quality of his work and benefit from participation in the wider, co-curricular activities on offer at the school. References from the candidate's current school will form part of the process.

- 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 overall budget. It is recognised that judgements about what sacrifices a family should make to pay school fees will be subjective.

The School has a duty to ensure that all bursary grants are well focused and so, as well as current earnings, other factors will be considered to determine the level of grant. These might 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.
- 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.
- Where fees are being paid to other schools (or universities) the school's level of support will take into account all these outgoings. The support offered to additional children in the

household by their school will also be taken into consideration.

- Acknowledging that others might have a different view, the school considers that indications of affordability such as the following may not be consistent with the receipt of a bursary:
    - frequent or costly holidays;
    - new or costly cars;
    - investment in significant home improvements;
    - significant tutoring costs;
    - a second property/land holdings.
- Other factors. It is recognised that, in addition to academic ability and financial constraints, there may be other circumstances which may be considered including:
    - Where the social needs of the child are relevant.
    - Where a parent / guardian is terminally ill or is unable to secure permanent employment due to poor health.

2. Existing Pupils - Change in Family Circumstances

The School recognises that there may on occasion be cases of sudden, unforeseen need or changes to circumstances that may merit bursary assistance out of the normal calendar cycle for bursary submission, scrutiny and award. Such awards are subject to the availability of funding and cannot be guaranteed or may be limited to completion of a school year. Parents/guardians with a child at the school whose financial circumstances suddenly change may apply for a bursary award, explaining their situation and requesting assistance. Parents will be expected to be pro-active to demonstrate that there is a case for a bursary. BAL will be used to support the financial assessment of applications.

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 Executive Head and Bursar, have the discretion 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.

Confidentiality

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

Applications

Applications for Bursaries should be addressed to:

- The Bursar, Shrewsbury House School, 107 Ditton Road, Surbiton, KT6 6RL
- email: Bursar@shstrust.net
- Telephone: 020 8399 3066

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. Shrewsbury House 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
Website: www.educational-grants.org

The Royal National Children's Foundation
Website: www.rncf.org.uk

Bursary awards are reported to the Governors annually, who take steps to overview efficiency of process and probity throughout. We report overall spend in our published Annual Report to the Charity Commission.