



SEDBERGH SCHOOL
and
CASTERTON, SEDBERGH PREPARATORY SCHOOL

MEANS TESTED BURSARIES POLICY

GENERAL

The Governors are committed to broadening access to the School to include a wide range of social backgrounds and ethnicity by offering to eligible parents/guardians means-tested financial support with the payment of School fees. Such support is known as a Bursary and may be awarded in the form of a percentage reduction on fees payable, depending on the financial, compassionate or other pertinent circumstances of applicants.

Bursary awards are subject to periodic review of parental means, and may be varied upwards or downwards, depending upon parental 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 circumstances.

Requests for financial support usually fall into two categories:

- New applicants to the School, where parents/guardians are unable to fund all of the School fee.
- Existing pupils, where a change in parents/guardians' circumstances has resulted in difficulty in meeting School fees and may result in the child being withdrawn part way through a stage of education.

NEW APPLICATIONS TO THE SCHOOL

Awareness: Information provided by the School alerting the Parents/Guardians of potential pupils to the possibility of gaining means-tested financial support with the payment of the School's fees is included in:

- The School prospectus
- The School website

THE APPLICATION PROCESS

Bursaries may be made available to parents/guardians of children entering the School. They are awarded at the discretion of the Governors, the Principal and the Chief Operating Officer. The Deputy Bursar (Compliance & Governance) is responsible for the management and coordination of the process.

Step One: Parents/Guardians seeking a Bursary are required to complete and return a Sedbergh School Registration form with the appropriate fee, available from the [School's Registrar](#), before an application can be considered. A request should then be made to the Registrar for a Bursary Application.

Bursary Applications are submitted via an online form which seeks to establish the financial circumstances of the household. The application, which requests details of income and capital, must be accompanied by full documentary evidence. The completed application, together with the necessary documentary evidence, should be submitted to the [Deputy Bursar \(Compliance & Governance\)](#) for consideration in the first instance. Should any assistance be required in the completion of the application the Deputy Bursar (Compliance & Governance) should be contacted. This submitted application could be followed by further discussions and investigations. Incomplete applications will not be processed.

Step Two: The Principal will assess all applications in order to establish the likely level of support which will be required in order to allow the child to attend the School. This may involve, where deemed necessary and subject to resources being available, his representative visiting the Parents'/Guardians' home to ensure the information has been correctly interpreted and the basis of the financial assessment has been fair.

Step Three: The Principal and Chief Operating Officer have some limited discretion to make awards on the delegated authority of the Governors.

Step Four: Where the limit of delegated authority is exceeded, an objective assessment of the application will be made and submitted to the Governors for consideration.

Step Five: The Parents/Guardians are advised of the outcome of the application by email, usually within fourteen days unless the pupil is also applying for a Scholarship through assessment. Should the Parents/Guardians wish to accept a Bursary Offer, they should confirm acceptance by replying to the offer email within ten days otherwise the funds may be allocated to another applicant.

Step Six: If a place in the School is then offered by the Headmaster, the Parents/Guardians are required to sign the School's Acceptance Form and pay the appropriate deposit within ten days to avoid the place and support being offered to another pupil.

The Acceptance Form is a legally binding document that commits both the School and the Parent/Guardian to its terms and the School's general Terms and Conditions.

THE CASE FOR ASSISTANCE

The Governors, Principal and Chief Operating Officer will consider several 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 any support.

Suitability: In assessing the child's suitability, attention will be given to the child's abilities and potential to benefit from being at the school, and their ability to contribute to it. Bursary funds are limited to those judged by the Principal as likely to gain the most from the educational provision. Each pupil to whom support is offered must, in the opinion of the Principal, be likely to make sound academic progress following admission, 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. Each applicant should meet the School's standard academic requirements and will be expected to make a positive contribution to the School. Previous School reports will be consulted for evidence of good behaviour.

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 such awards within the context of the overall operating budget. Bursaries are funded from fee income and endowed income. Sedbergh School has a duty to ensure that all Bursary grants are thoroughly assessed and, as well as current earnings, other factors which will be considered in determining the necessary level of grant will include:

- Opportunities to release capital. Significant capital savings, investments or equity would be expected to be used for the payment of School fees, as would equity values in houses or other properties.
- 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.
- Where fees are being paid to other schools or universities, the School's Bursary will consider all such outgoings.

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
- Where 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 separation has resulted in the child potentially having to be withdrawn from the School adding to the stress of coping with the parents/guardians separating.

EXISTING PUPILS – CHANGE IN FAMILY CIRCUMSTANCES

Within the available budget funding, Sedbergh School will, in normal circumstances, set aside each year a Hardship Fund for cases of sudden, unforeseen need or where applications meriting Bursary assistance are received out of the normal cycle of Bursary submission, scrutiny and award. This sum will be set within defined budgetary constraints. Parents/Guardians with a child at the School whose financial circumstances suddenly change may apply for a Bursary, explaining their situation. Such awards are subject to the availability of funding and cannot be guaranteed.

REVIEW OF AWARDS

All Bursary awards may be subject to repeat testing of parental means and may be varied upwards or downwards depending on the parental circumstances. Current Bursary holders will be issued with repeat means-testing forms as they fall due for return within fourteen days. For those previously in receipt of Bursaries, the Governors, Principal and Chief Operating Officer have the discretion to recommend the reduction or withdrawal of an award not only where the pupil's progress or behaviour has been unsatisfactory but also where the Parents/Guardians have failed to meet the terms and conditions of the School, for example by late payment of any contribution they are making to the School fees.

CONFIDENTIALITY

Sedbergh School respects the confidentiality of bursary awards made to families. All recipients of awards are required to respect the confidential nature of the financial support provided.

OTHER SOURCES OF BURSARY ASSISTANCE

In addition to the School's Bursary Fund, there are several educational and charitable trusts which help with school fees. In most 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. The School encourages parent/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
www.educational-grants.org

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