



SHERBORNE

BURSARY POLICY

1. General

- 1.1 In line with the School's Charter and the objectives of the Charity, The Governors of Sherborne School are committed to offering to eligible parents/guardians means-tested financial support with the payment of school fees to enable a boy to attend Sherborne School who otherwise would not be able to do so. Such support is known as a bursary and may be awarded in the form of a remission of up to 100% of fees, depending on the financial, compassionate or other pertinent circumstances of applicants.
- 1.2 Bursary awards are made on the basis of an assessment of a family's financial circumstances using a Confidential Statement of Financial Circumstances (Means Test) form, including their savings, investments and realisable assets, as well as their income, the size of their family, any other persons dependent upon them and other similar factors. Awards are subject to repeat testing of parental means each year and may be varied upwards or downwards, depending on parental circumstances.
- 1.3 Bursaries are available to Scholars and other award holders and for existing pupils where a change in parents/guardians' circumstances has resulted in difficulty in meeting termly fees and may result in the boy being withdrawn part way through a stage of education.

2. New Applicants to the School

- 2.1 Bursaries are available as follows:
 - For boys who are awarded a scholarship or other merit award but who require further financial assistance with termly fees in order to take up their place at Sherborne;
 - For boys who apply for and are awarded open bursaries.
- 2.2 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 school fees is included in:
 - The School prospectus.
 - The School website.
 - Open bursaries are advertised in the local press.

- 2.3 Parents who are likely to require assistance with the payment of school fees should obtain a Means Test Form from the Admissions Department and complete and return it to the Director of Admissions **before** their son is assessed for a scholarship or other award. This will then enable decisions on bursaries to be made at the same time as scholarships are awarded. Bursaries are awarded at the discretion of the Governors, and the Headmaster and Bursar are responsible for the management and coordination of the process in accordance with “The Case for Assistance” as set out below.
- 2.4 Bursaries are awarded in accordance with the order in which awards are made, the top award holders being allocated funds first. Therefore, depending on the requirement for assistance in any one year, it is not always possible to award a bursary to all award holders even if their family’s financial circumstances justify it.
- 2.5 Applications for open bursaries should be submitted in accordance with the timescales advertised on the School website and/or as otherwise advised by the Director of Admissions. The application process includes the completion of a Means Test form together with all the supporting documentary evidence requested.
- 2.6 The Bursar assesses all applications for open bursaries in order to establish the eligibility for financial support; this may involve the Bursar visiting the parents/guardians’ home to ensure the information has been correctly interpreted and that the basis of the financial assessment is fair.
- 2.7 The Bursar prepares a recommendation based on the family financial circumstances which is considered with the Headmaster and a joint recommendation is then reached. Parents/guardians are then advised whether their applications have passed the initial assessment. Boys will then be invited to the School to take tests to establish that they meet the School’s entry criteria, based on Key Stage 3 and focusing upon English, Mathematics and Science. Boys will also be interviewed by the Headmaster as part of the assessment process.
- 2.8 The Headmaster together with the Bursar will review the outcome of the tests and interviews in accordance with the criteria set out under “The Case for Assistance”. They will prepare a short list of boys who will be selected to receive an open bursary subject to final checking of the financial circumstances by the Bursar which is likely to include a home visit if one has not already been completed.
- 2.9 Parents/guardians will be advised of the outcome. Parents/guardians of boys who are awarded open bursaries are then required to sign a letter accepting the place at the school and an acknowledgement agreeing to any conditions relating to the bursary.

3. The Case for Assistance

- 3.1 The Headmaster and Bursar will consider a number of factors when making the judgement as to the justification for support, and the extent of such support. In the main, the boy’s suitability for the School is the first consideration in granting support.
- 3.2 In assessing a boy’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. Bursary funds are limited and those judged likely to gain most from the School’s educational

provision will be given priority. Each pupil to whom support is offered must, in the opinion of the Headmaster, be likely to make sound academic progress following admission and possess the potential to develop the quality of his work. He will be expected to benefit other pupils through his participation in the wider, extra-curricular activities on offer at the School. Previous school reports will be consulted for evidence of good behaviour. Any boy in receipt of a bursary will be expected to abide by all the School's policies and to meet its academic expectations.

3.3 The amount of the bursary award is not influenced by the level of the academic ability of the boy 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 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 surplus equity values in houses.
- 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.
- Payment of fees to other schools. The School's assessment will take into account all these outgoings.
- Lifestyle of family. 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;
 - Expensive or luxury cars;
 - Investment in significant home improvements;
 - A second property/land holdings.

3.4 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 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.

4. Existing Pupils - Change in Family Circumstances

- 4.1 Boys who are Scholars or other award holders but who do not receive a bursary at entry are eligible to be considered for a bursary in the event that their family financial circumstances change whilst they are at the School. The application process and factors for consideration will be the same as set out above for new entrants but in addition a boy's progress, attitude and behaviour at the School will be taken into account.
- 4.2 Within overall budget funding, in normal circumstances the School will 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 calendar cycle for bursary submission, scrutiny and award. This sum will be set within budgetary constraints. Parents/guardians with a boy at the School whose financial circumstances suddenly change may apply for a bursary to the Bursar explaining their situation and by submitting a Means Test form which is available from the Bursar. Such awards are subject to the availability of funding and cannot be guaranteed. It is unlikely that funding in such circumstances will be available for boys currently in the 3rd Form or for those moving into the Sixth Form as priority is given to boys who are studying for public exams.

5. Annual Review

- 5.1 All bursary awards are subject to repeat testing of parental means each year and may be varied upwards or downwards depending on parental circumstances. Parents of bursary holders will be required to complete Means Test forms to reflect their financial circumstances each spring. For those previously in receipt of bursaries, the Headmaster and Bursar have the discretion to reduce or withdraw an award not only where a boy'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.

6. Confidentiality

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

7. Other Sources of Bursary Assistance

- 7.1 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. Sherborne 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 Bursar or from the Independent Schools Educational Grants Advice helpline 01932 865619.

**Bursar
September 2017**