



## **DORSET HOUSE SCHOOL**

### **Bursary Policy**

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Approved by: Governors' Estates & Finance Committee



## **1. AIMS**

Dorset House School (“The School”) is the trading name of a registered charity, Bury Manor School Trust Ltd, and is committed to fulfilling its charitable purposes. The School is aware of its obligations under the Charities Act 2011 and seeks to promote the principles of public benefit in accordance with the law.

The School wishes to encourage pupil access and to ensure that the educational opportunities offered by the School are made available to children from a broad spectrum of society, regardless of their family’s ability to pay school fees.

## **2. THE DORSET HOUSE SCHOOL BURSARY SCHEME**

The School’s bursary scheme is designed to assist parents who for financial reasons might otherwise be unable to send or continue to send their child to the School. The scheme includes both entrance bursaries for the parents of new pupils and emergency bursaries for parents of pupils who experience a significant change in their financial circumstances which could not reasonably have been foreseen at the time of their child’s admission to the School.

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.

The value of most individual bursaries ranges from 5% to 30% of tuition fees. Bursary awards may be expressed as a percentage of fees or a fixed termly amount. The School has a limited bursary fund and only rarely would larger awards be made. All bursaries are fully means-tested and are assessed on a sliding scale depending on the parents’ combined annual income, net assets and any other relevant information.

Decisions regarding bursary awards will be notified to the parents in writing. The decision of the School regarding the award or level of bursary is final.

Holders of bursary awards may also be eligible for additional bursary funding to assist with the costs of school trips, normally where the intended learning objectives are central to the curriculum. Applications for school trip bursaries will be considered on a case by case basis.

## **3. APPLICATION FOR A BURSARY AWARD**

The School deems bursary applications as being made jointly by all parents irrespective of marital status.

It is important to recognise, that, due to budgetary constraints, not every eligible application for a bursary will result in an offer of financial assistance from the School.



Households which may be classified as 'low income' but which own or have access to substantial assets may be ineligible to receive a bursary.

Entrance bursaries are only offered to the parents of those children who meet the academic and other entrance requirements. Bursary applications should be made as early as possible before the proposed entry date.

For the avoidance of doubt, other than in the most exceptional of circumstances, applications for emergency bursary assistance will only be considered for pupils who have been at the School for at least 12 months.

If 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.

Emergency bursaries will be considered by the School as quickly as possible after it has been notified by parents of a sudden or unexpected adverse change in their family circumstances and/or financial position. The outcome will be notified to the applicants in writing.

In addition to considerations of financial need, the School will have regard to the pupil's standard of conduct and progress when assessing for emergency bursary funding.

All bursaries are subject to annual reassessment (see 8 below) and any improvement in the parents' financial circumstances may be reflected in the level of bursary offered for the following year.

#### **4. CONFIDENTIAL STATEMENT OF FINANCIAL CIRCUMSTANCES**

All parents who wish to apply for a bursary are required to complete the detailed Confidential Statement of Financial Circumstances form which will be supplied to them by the Bursar. The School is unable to consider bursary applications where a parent declines to provide the requested information.

The Confidential Statement of Financial Circumstances is based on a standard independent schools' template and is designed to provide a full picture of the income, outgoings, assets, liabilities and family circumstances of parents. It must be completed in full and be supported by documentary evidence of the figures disclosed. Incomplete applications will be returned and only considered once the form has been completed in full and all relevant documentary evidence has been supplied. In addition, parents must provide any supplementary information that is requested.

In cases of separation or divorce, the financial circumstances of parents will be considered as part of the bursary assessment irrespective of any financial or other arrangement made between them. This will include consideration of the level of income and net assets of any step-parent or partner living in the same household, together with any financial commitments relating to children from



previous marriages/relationships. Individual Confidential Statement of Financial Circumstances forms will be supplied to separated or divorced parents for completion.

## 5. THE CASE FOR ASSISTANCE

The School will consider a number of factors when assessing an application for financial support.

- **Suitability:** All children for whom a bursary application is made must meet the School's normal academic requirements for entry. Bursary funds are limited and in situations where the total value of potential bursary awards to qualifying applicants exceeds the budgeted bursary funds available, the School will have regard to the individual's academic performance and potential when awarding the available funds.
- **Financial Limitations:** The amount of the bursary award is determined on the basis of financial need. Each case is assessed on its own merits and awards are made accordingly, subject to the School's resources.

The School has a duty to ensure that all bursary awards are well focussed and therefore, as well as current earnings, other factors which will be considered in determining the necessary level of grant will include:

- The ability of a family to improve its financial position or earning power. For example, where there are two parents, both are expected to maximise or seek to maximise their income either through employment or self-employment, unless prevented from doing so through such factors as incapacity, the need to care for young children or other dependents, or the requirements of their partner's work.
- The school expects parents to explore all possible avenues for the funding of school fees.
- Opportunities to release any capital. Significant capital savings and investments are expected to be used for the payment of school fees.
- A significant level of equity in the family home.
- Contribution to household costs by other family members, by any adults unrelated to the child or by outside sources.
- Where fees are being paid to other schools, the School's bursary grant will take into account these outgoings. Applicants are expected to apply for financial help from all education institutions attended by members of the family at the time that an application is made to the Dorset House School for bursary assistance. It is unlikely that the School will offer a level of bursary assistance in excess of that accepted for siblings in other schools.
- Entitlement or access to other discretionary receipts or facilities.
- 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.
  - Luxury cars (unless required as part of their employment).
  - Significant investment in major home improvements.
  - A second property and/or additional land holdings.
  - Discretionary receipt of luxury accommodation or other advantages.



**Pastoral and social Factors:** It is recognised that, in addition to financial constraints existing within a family, there may be other major factors (pastoral and social) which the School needs, at its absolute discretion, to take into account when considering a bursary award.

## **6. BURSARY ASSESSMENT**

Once the completed Confidential Statement of Financial Circumstances, together with full documentary evidence has been received, the Bursar will make an appointment to discuss the application with parents, either in person or by telephone.

Subsequent to the meeting, the Bursar will meet with the school Governor who has oversight of the Bursary fund. They will then make a final decision which will be notified to the parents in writing. The decision of the Bursar and the responsible Governor regarding the offer of a bursary or the level of that bursary is discretionary and final.

The School reserves the right to use an independent company specialising in assessing bursary applications, to undertake bursary assessments and reassessments on its behalf. This may include a home visit if deemed necessary.

## **7. VALUE OF BURSARIES**

As noted above, the value of most individual bursaries ranges from 5% to 30% of tuition fees. Bursary awards may be expressed as a percentage of fees or a fixed termly amount. The School has a limited bursary fund and only rarely would larger awards be made.

Each bursary offer will reflect the particular circumstances of the recipient. The bursary award will be shown on the face of each termly bill as a deduction against the full tuition fee. For the avoidance of doubt, bursary remissions apply to the core termly fees only and not to any extras such as boarding or school trips.

The school reserves the right to withdraw the bursary if the remaining fees (after the bursary deduction) are not paid in a timely manner and in accordance with our parent agreement. An award may be withdrawn if, in the opinion of the Head, your child's attendance, progress and/or behaviour (and/or your behaviour or conduct (or the behaviour or conduct of one of you)) no longer merit the continuation of the award. Any such withdrawal of an award will not operate so as to increase the fees due in respect of a term which has already commenced.

## **8. ANNUAL REASSESSMENT AND CHANGES IN CIRCUMSTANCES**

All bursaries are awarded on an annual basis and, with the exception of short-term awards awarded for one year or less, are subject to annual reassessment to determine if there has been any material change in financial circumstances. The reassessment will require completion of the



Confidential Statement of Financial Circumstances form again and submission of supporting documentation. The Bursar will meet with all bursary recipients in the Easter term to confirm the bursary award for the following academic year.

Should any of the information disclosed in support of a bursary application become inaccurate during the course of a year, the School must be informed without delay. Failure to divulge requested information or notify a change in circumstances to the School may lead to a bursary being adjusted, withdrawn or withheld.

## **9. CONFIDENTIALITY**

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

## **10. PUBLICITY**

The School views a socially diverse pupil population as a key component of a full and balanced education for all pupils. The availability of bursaries is advertised on the School's website, in the school prospectus, in suitable professional publications, and in the local press.

## **11. OTHER SOURCES OF BURSARY ASSISTANCE**

In addition to the School's Bursary Fund, there are a number of educational and charitable trusts which can 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. The School encourages parents to apply for support where it is felt that a good case can be made for assistance.

The Educational Trusts' Forum ([educational-grants.org](http://educational-grants.org)) is a useful source of information.

## **12. ADDITIONAL INFORMATION**

If additional information is required or to make an application, parents should contact the Bursar for more information. The relevant contact details are: Tel: 01798 831 456; email: [bursar@dorsethouseschool.co.uk](mailto:bursar@dorsethouseschool.co.uk).