



Bursary Award Policy and Procedures 2023-2024

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**MORE
HOUSE
SCHOOL**

KNIGHTSBRIDGE

Bursary Award Policy and Procedures

1. General

It is the policy of More House School (the “School”) to support promising and talented pupils who will contribute positively to the life of the School and whose parents are unable to pay full fees. The Governing Board of the School is committed to ensuring that students from the local community and beyond are able to participate in the educational experience offered at More House School. The Governors also encourage the School to continue to improve wider public access through the provision of fee remission each year to pupils of outstanding ability whose parents would not be able to afford the School's fees.

The Governing Board provides financial support to pupils through a means-tested bursary scheme and a number of non-means-tested fee remissions to parents or guardians of prospective pupils entering any year-group of the School. While Bursaries are usually limited to up to 50% remission of School Fees (excluding extras which are payable in full), in exceptional circumstances Bursaries of up to 100% of full fees may be available depending on the financial, compassionate or other circumstances of applicants.

2. Decision Making

All bursaries are awarded at the discretion of the Bursary Group, a sub-group of the Governing Board, which comprises a Vice-Chair, the Governor responsible for Faith Matters, the Head of the School and the Director of Finance and Resources. The Head, the Director of Finance and Resources and the Registrar are responsible for the management and coordination of the process. All such awards are subject to annual independent means testing and may be varied upwards or downwards if parent/guardian circumstances change. The number of bursaries awarded each year is limited by the amount of funds available.

The decision of the Bursary Group is final and not subject to appeal.

Information alerting parents to the possibility of gaining means-tested financial support with the payment of School fees is included on the School website.

The Bursary Application Form is available from the Registrar of More House School on request via the website, or by email to registrar@morehousemail.org.uk

3. Categories of Financial Support

Requests for financial support usually fall into two categories:

- New applicants to the School entering any year-group, where a place has been offered but parents/guardians are unable to fund the fees.
- Existing pupils where a change in parents’/guardians’ circumstances has resulted in difficulty in meeting the full fees and might otherwise result in a pupil being withdrawn part way through their More House School education.

Bursaries do not include the Registration Fee, the Bursary Application/Renewal fee, the Acceptance Deposit, lunch or any extras except for those stipulated when the award is made.

4. The Application Process

The process is based upon completion and assessment of the Bursary Application Form, administered by an independent company, Bursary Administration Limited (“BAL”). This form takes into account the financial circumstances of both parents, of any current partner of one or both parents, and any other adult contributing to the household income. Savings, investments and realisable assets, as well as their income, their lifestyle choices, the size of their family and any other person dependent upon them are also taken into account.

Below is a list of the paperwork that may be required to support an Application. BAL will ensure that all supporting documentary evidence relevant to your circumstances is provided and will assist in completing the application accurately.

- Last 3 payslips for each applicant
- Most recent P60 for each applicant
- Most recent full audited accounts for each business, where relevant. • Most recent self-assessment tax calculation summary (SA402), where relevant, for each applicant
- Schedule D self-employment income declaration for each applicant
- Three months’ bank/savings/loan statements for all accounts
- P45, final payslip and redundancy settlement where relevant
- Proof of value of savings and investments
- Most recent pension and/or endowment valuation if over 55
- Benefit/Tax Credit/Universal Credit letters, if appropriate
- Most recent mortgage statement/rental agreement on all properties • Most recent council tax bills
- Latest loan statements
- Latest credit card statements
- Contents insurance schedule
- Details of any legal financial agreements.
- Details of any adult contributing to the household income
- Any other appropriate documents to support your application

NEW APPLICATIONS

Step One

Full and correct completion and submission of the Bursary Application Form along with all supporting evidence. If receipt of application has not been confirmed within 5 days, please contact BAL by email to admin@schoolbursaryguide.com, or call them on 01622 725712.

For all new applications and existing pupils and those entering other year-groups, this will involve a visit to the Parents' home by BAL to ensure the information has been correctly presented and interpreted. This step should be completed no later than 30 November of the year preceding entry for Year 7 or the new academic year for existing pupils.

Step Two

Assessment of each application by BAL, acting on behalf of the School, in order to establish the level of support required. The assessment 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 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 pupil or by outside sources.
- Indications of wealth such as the following would not be consistent with the receipt of a bursary award:
 - frequent or expensive holidays;
 - new or luxury cars;
 - investment in significant home improvements; and
 - a second property/land holdings.

It is recognised that judgements about what sacrifices a family should make to pay School fees will be personal and some applicants may feel the process is intrusive and uncomfortable. However, we are a charitable trust with fiduciary responsibilities and in order to ensure our limited funds are prioritised we ask BAL to be rigorous in the means testing process. Please note that BAL's role ends at this stage and they will have no involvement in the decision-making process.

Step Three

Review of bursary funds available and consideration of all applications on a "no names" basis by the Bursary Group. Bursary awards are influenced by the academic ability of the pupil, any special talents that they have and the contribution they would make to the life of the School.

Step Four

Parents/guardians will be advised of their suitability for an award by the School. For parents hoping their daughter will join Year 7 at the beginning of the next academic year

(in September) and existing pupils, this process will be completed by the end of the prior January.

Step Five

Finally, parents/guardians offered bursary support are then required to sign an agreement accepting the award and the related Terms and Conditions.

RENEWAL

Application forms are sent to current bursary holders by the Registrar in the first week of December. The deadline for submission of the completed form to BAL, is no later than 30 December each year.

Steps Two to Three for new applicants will also apply to those renewing.

Step Four

Parents/guardians will be advised of their suitability for an award by the School. This process will be completed by the mid-March of the year before the new Academic Year commencing in September.

Step Five

Parents/guardians offered bursary support are then required to sign an agreement accepting the award and the related Terms and Conditions.

All bursary awards are subject to a regular review of financial means and may be varied upwards or downwards depending on financial circumstances. Current bursary holders will be issued with further means - testing forms once a year, generally early in the Spring term, and these will be assessed by BAL, as for new applications.

5. Terms and Conditions

Please read the Term and Conditions in Appendix 1 at the end of this document carefully.

The Head, the Director of Finance and Resources and the Registrar, in making their joint recommendation to the Bursary Group, have discretion to recommend a 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, or by breaching any of the School's Terms and Conditions.

6. Confidentiality

The School and BAL respect the confidentiality of bursary awards made to families and recipients are expected to do likewise.

7. Retention

BAL will retain data collected from the website for as long as necessary to provide BAL's services, and as necessary to comply with BAL's legal obligations, resolve disputes, and enforce BAL's policies. Retention periods will be determined taking into account the type of data that is collected and the purpose for which it is collected, bearing in mind the requirements applicable to the situation and the need to destroy outdated, unused data at the earliest reasonable time.

The School will retain all relevant financial Information and associated correspondence in accordance with the School's Privacy Policy and guidance for the retention of pupil records and General Data Protection Regulation.

8. Other Sources of Bursary Assistance

In addition to the School's own bursary funds, there are a number of educational and charitable trusts which provide assistance with tuition fees. In the majority of cases, these are to assist pupils who are already attending a fee-paying school and due to a change of circumstances may be unable to remain. The School encourages parents/guardians to apply for support where it is felt a good case can be made for assistance.

The Educational Grants Advice Service +44 (0)1932 865 619 (9am-11am, Monday - Friday, offers information and advice on a variety of ways to get help with school fees.

APPENDIX 1

Term and Conditions of Bursary Award

Pupil & Parent/Guardian Obligations

1. All pupils whose education is being funded fully or partially by a More House bursary, are required to work hard, to contribute positively to the life of the School, to be a credit to the School and to set a good example to other pupils.
2. Parents are expected to support and encourage their child to achieve these aims and to be supportive of the School and uphold its good name.
3. Parents/Guardians are required to pay the balance of the School fee account, in accordance with the Parent Contract.
4. A bursary award may be withdrawn by written notice sent to a Parent/Guardian if, in the opinion of the School in its sole discretion acting in good faith:
 - 4.1 the pupil or the Parents have not complied with the obligations set out in paragraphs 1 to 3 above; or
 - 4.2 the pupil has fallen below the required standards of conduct and progress and in the opinion of the School, there has been no significant improvement following consultation with a Parent/Guardian and/or the pupil and after a written warning. Withdrawal of the bursary award shall take effect from the start of the following term; or
 - 4.3 the balance of the School fee account which falls due for payment on the first day of the School Term to which it relates remains unpaid 7 days after the start of the applicable School Term; or
 - 4.4 Parents fail to disclose accurate information about their financial position, or do not report any material change in their financial situation, from when they first applied and were granted the bursary award.

Repayment of Bursary Award

5. Parents may be required, upon written notice, to repay all or part of up to three terms' benefits they have received under a bursary award in any of the following circumstances:
 - 5.1 the pupil demonstrates serious misconduct, or has been excluded or removed from the School by reason of misconduct by the Head acting in good faith; or
 - 5.2 in the case of a pupil being withdrawn for any reason during a School Term, without the required full term's notice having been received formally in writing by

the School, no later than the first day of School Term preceding the actual School Term of withdrawal.

6. For the avoidance of doubt, the benefits receivable under a bursary award do not apply to any School Term for which the School has required payment of fees in lieu of notice.

Conflicts

7. These Terms and Conditions should be read in conjunction with The Parent Contract. Where there is a conflict between these Terms and Conditions and The Parent Contract, these Terms and Conditions take precedence in matters relating to bursary awards.

Pupil's name: _____

Agreed for and on behalf of the pupil's Parent(s)/Guardian(s)

Signed by: _____ (Parent /Guardian 1)

Date: _____

Signed by: _____ (Parent /Guardian 2)

Date: _____

For and on behalf of More House Trust Limited

Signed by: _____

Date: _____

Print name and Position:
