



ST MARY'S CALNE
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Bursary Policy

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Reviewed by F&GP May 2026. Information on fee remissions removed from appendices to become separate policy.

1. Introduction

The Governors of St Mary's and St Margaret's ('the schools') are committed to broadening access to both schools by offering means-tested financial support (bursaries) with the payment of school fees to eligible families. Bursary support of up to 110% of fees may be available depending on the financial, compassionate or other circumstances of applicants.

All bursary awards are subject to an annual review of parental means and may be varied upward, downward, or removed entirely, depending on circumstances. Parents / legal guardians who wish to apply for a bursary will be asked to complete a Confidential Statement of Financial Circumstances form. The form is confidential and requires full information about the family's financial circumstances, with supporting documentation. We use a specialist external organisation called Bursary Administration Ltd (BAL), to review and assess bursary applications. Shortly after receipt of the application form, BAL will arrange an appointment with applicants to discuss their application. This may include a home visit.

2. Categories of financial support

Requests for bursary support usually fall into two categories:

- i. Applicants whose parents/guardians are unable to afford the full fees
- ii. Existing pupils, where a change in parents/guardians' circumstances has resulted in difficulty in meeting the full fees and may result in the child being withdrawn part way through a stage of the education.

Bursary support is not linked to scholarship awards. However, families can apply for a bursary to supplement other fee discounts, which some families may be eligible for. There is a separate policy on fee discounts.

Where a family is eligible for one or more fee discount(s) as well as a bursary, the bursary will always be applied first, with any other discounts(s) applied to the balance.

3. Applying for a bursary

Bursaries may be made available to parents or guardians of children entering any year group from Year 1 at St Margaret's and from LIV (Year 7) at St Mary's. Bursaries are awarded at the discretion of the schools. The Head and COO (Chief Operating Officer) are responsible for the management and coordination of the process, in cooperation with admissions colleagues, and, for St Margaret's pupils, the Head of Prep.

- Step One: Complete the bursary application form via ITQ Metis. Once the application is complete and forms uploaded, the application is reviewed. If potential financial support is identified, the application is sent to BAL. This must be done no later than **the last day of the Autumn Term** of the year preceding entry.

- Step Two: Assessment of each application to establish the level of support required. This will involve a meeting with BAL to ensure the information has been correctly interpreted and the basis of the financial assessment has been fair.
- Step Three: Consideration of all applications by the Bursary Committee. The Bursary Committee will always include the Head and COO.
- Step Four: We will write to parents/guardians applying for a bursary on the outcome of their application and the level of the award at least one week before the acceptance deadline, which is usually the first Monday in March. All awards are dependent on the pupil satisfying the schools' academic entrance requirements
- Step Five: Parents/guardians are required to sign an agreement accepting the award and the terms and conditions related to it.

4. Eligibility for Awards

BAL is responsible for undertaking the means-tested assessment, but the final decision about whether to award a bursary, and at what level, rests with the schools. Once a bursary is awarded, the amount is not influenced by the academic ability of the child, but by the extent of need. Each application is assessed on its own merits and awards are made accordingly, subject to the schools' ability to fund them. We recognise that judgements about what sacrifices a family should make to pay school fees will be subjective. The schools have a duty to ensure that all bursary awards are well focused and so, as well as current earnings, other factors will be considered in determining the necessary 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 value in houses or other property.
- in cases of separation, we expect contributions to be made by both parents, where both parents have parental responsibility.
- contribution to household costs by other, wider, family members, any adults unrelated to the child or by alternative sources.
- the level of regular household spending (for example food, clothing etc) above average expectations, without provision of extenuating circumstances.

Acknowledging that others might have a different view, the schools consider indications of wealth, such as the following, are not consistent with the receipt of a bursary:

- frequent or expensive holidays
- new or luxury cars
- investment in significant home improvements
- a second property/land holdings
- high value capital assets such as luxury watches, valuable works of art or other high value luxury items
- considerable savings, such as ISAs.

Other circumstances which should be considered might include:

- the social needs of the child (e.g. the personal circumstances of the child mean that the provision of boarding will materially help them)
- where a parent is terminally ill or is unable to secure permanent employment due to poor health.

5. Suitability of applicant

Bursary funds are limited and priority will be given to those likely to gain most from the educational provision. The potential contribution of the candidate to the wider school community will also be taken into consideration, as will the likely impact of the award on the child.

6. Existing Pupils – change in family circumstances

Within overall budget funding, the schools will, in normal circumstances, set aside a funding allocation each year for cases of sudden, unforeseen need or where applications meriting bursary assistance are received out of the normal calendar cycle. This sum will be set within budgetary constraints. Parents or guardians with a child at the school whose financial circumstances suddenly change may apply for a bursary explaining their situation and requesting assistance.

Such awards are subject to the availability of funding, the suitability of the candidate and may be limited to completion of a school year or the next stage of education.

7. Annual Review

The schools reserve the right to undertake a means-tested review of all bursary awards each year. Following a review, any bursary award may be varied upwards, downwards, or removed entirely, depending on parental circumstances.

Current bursary holders will be issued with repeat means-testing forms in November for submission in early December. For those previously in receipt of bursaries, the schools may 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 schools, for example by the late payment of any contribution they are making to the fees, or if the schools have been made aware of a potential change in a family's financial circumstances or a family's expenditure habits (please see section 4 above).

8. Confidentiality

The schools respect the confidentiality of bursary awards made to families and recipients are expected to do likewise. In certain circumstances, recipients and their families may be asked to share their stories to demonstrate the impact of bursary support to supporters and other stakeholders. These stories will not be shared without written consent from the beneficiary and parent or guardian.

9. Other sources of bursary assistance

In addition to the schools' funds, there are some educational and charitable trusts

which provide assistance with tuition fees. In the majority of cases, these are to assist children already attending a fee-paying school but, due to a change of circumstances, may be unable to remain. The schools encourage parents to apply for such support where it is felt a good case can be made for assistance. Further information may be obtained from: The Educational Trusts Forum
<http://www.educational-grants.org/>

The Educational Trusts' Forum started in the early 1980s as the Joint Trusts' Liaison Committee. It changed its name in 1988. Its membership comprises registered charities that are prepared to consider grants and awards to assist families in need who cannot afford educational or boarding fees. Pupils may be at independent schools or state schools where a boarding fee is charged.

10. Data protection

By using an external organisation to assist with processing bursary applications, information provided by applicants may be made available, in confidence, to that organisation for those purposes. All personal data processed in connection with the schools' arrangements for bursaries shall be processed in accordance with the schools' Privacy Policy, which is available on the schools' websites and is otherwise available from the schools on request.

Appendix A – Bursary conditions of award

1. **Grant of the award:** An award is granted at the sole discretion of the schools.
2. **Obligations of the pupil:** A pupil who attends St Mary's or St Margaret's with the support of a financial bursary is 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. The pupil must adhere to the schools' required standards of conduct, attendance and progress. These are the *Purposes of the Award*.
3. **Obligations of parents/guardians:** The parents are required to:
 - 3.1 support and encourage the pupil to achieve the Purposes of the Award; and
 - 3.2 treat the school and its staff reasonably and to uphold the aims and the good name of the school; and
 - 3.3 comply with the school's Terms and Conditions.
4. **Means tested awards:** All means tested awards will be subject to annual review and parents will be required to complete a financial means questionnaire each year. After any annual review, the schools reserve the right to remove or vary the value of the award with immediate effect and will confirm this in writing to the parents/guardians.
5. **Continuation of the award:** Continuation of the award is dependent upon the following conditions being fulfilled:
 - 5.1 parents satisfy the schools' financial requirements each year, and
 - 5.2 the financial resources allocated by the schools to support the award being sufficient to maintain the award; and
 - 5.3 it being in the financial interests of the school as a whole to maintain the award.
6. **Confidentiality:** The value and terms and conditions of the award must remain confidential between the parents and the school. If this confidentiality is breached, any award may be terminated.
7. **Termination of the Award:** The award may be terminated on the following grounds:
 - 7.1 **Termination on financial grounds:** The school may terminate the award on one term's notice if, in the opinion of the school acting in good faith:
 - 7.1.1 The parents have not satisfied the schools' financial requirements under paragraphs 4 and 5.1 above; or
 - 7.1.2 The school is no longer able to continue the award under paragraph 5.2 above. The termination will take effect from the date set out in the written notice.
 - 7.2 **Termination on the grounds of conduct:** The school may terminate the award by written notice sent to a parent with immediate effect if, in the opinion of the school acting in good faith, one or more of the following conditions has been fulfilled:
 - 7.2.1 A pupil has not complied with the obligations set out in paragraph 2 above and, in the further opinion of the school, there has been no significant improvement following consultation with a parent and/or the pupil and a written warning; or
 - 7.2.2 A parent has not complied with the obligations set out in paragraph 3 above; or
 - 7.2.3 The value and terms and conditions of the award do not remain

confidential in accordance with paragraph 6 above; or
7.2.4 The pupil is withdrawn without a term's written notice.

7.3 **Repayment of the award:** A parent may be required to repay all or part of the benefits received under the award if it is terminated in any of the following circumstances:

7.3.1 Under clause 7.1.1. above if a parent has knowingly or recklessly provided false or inaccurate information about their financial position, all benefits received from the date on which the false or inaccurate information was supplied may be repayable; or

7.3.2 Under clause 7.1.2. above, if a pupil has been found to have committed a serious breach or series of persistent minor breaches of school discipline for which the sanction would normally be expulsion or required removal, up to three terms' benefits (if received) may be repayable.

8. **Fees in lieu of notice:** For the avoidance of doubt, the benefit receivable under an award will not apply to any term for which the school has required payment of fees in lieu of notice.

9. **Terms and Conditions:** These Conditions of Award take precedence over any of the school's Terms and Conditions which are inconsistent with them but in all other respects the Terms and Conditions as amended from time to time shall apply and these Conditions of Award shall be interpreted in accordance with them.