



Homefield Preparatory School

Bursary and Scholarships Policy

General

Bursary awards are means tested and relate to fees affordability. They are open, by application, to existing parents/guardians or to those whose boys pass our selective entrance assessment. Scholarships relate to academic attainment and are open only to boys who already attend the School. They are not open to application but are internally awarded by the School.

Bursaries

The Governors of Homefield Preparatory School are committed to broadening access to the school by offering means-tested financial support with the payment of schools fees to eligible parents/guardians. Such support is known as a bursary.

Bursary awards are subject to testing of parental means each year and the level of the award may be varied depending on circumstances. Awards are made on the basis of a number of different factors and will depend on individual parents'/guardians' 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 considerations.

Requests for financial support usually fall into two categories:

1. New applicants to the School, but their parents/guardians are unable to afford the full fees;
2. Existing pupils where a change in parents'/guardians' circumstances has resulted in difficulty in meeting tuition fees and may result in the child being withdrawn part way through a stage of education.

The School will only be able to provide bursaries to a proportion of applicants before its bursary funds are exhausted.

1. New Applicants 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 schools fees is included in the school prospectus and on the school website.

The Application Process

Bursaries may be made available to parents/guardians of children entering any year group of the Senior School of Homefield Preparatory School but only in exceptional circumstances would a bursary be awarded to pupils below Year 4. They are awarded by the Headmaster and Bursar who

SMT responsible: Bursar

Date: January 2019

Review date: September 2020

are responsible for the management and coordination of the process and this is reported to Trustees.

Step one. Parents/guardians seeking a bursary are required to register for a place at Homefield Preparatory School and their son will be academically assessed. If the student reaches our selective assessment criterion the parent may then move to step two.

Step two. Parents/guardians must complete an application form, which seeks to establish the financial circumstances of the household. The form, which requests details of income and capital, which can be obtained from the Bursar, must be accompanied by full documentary evidence. The completed forms, together with the necessary documentary evidence, are to be submitted to the Bursar no later than the **1st January** in any year for bursaries to start the following September. All applications are assessed in order to establish the likely level of support which will be required in order to allow the child to attend the school. Homefield Preparatory School currently uses Bursary Administration Ltd (BAL) to support the financial assessment of bursary applications. BAL is registered as a Data Controller with the Information Commissioner's Office. Parents will be expected to provide a full financial disclosure to BAL, who will also arrange a home visit as part of the assessment process to ensure the information has been correctly interpreted and the basis of the financial assessment has been fair. To view their website please visit www.schoolbursaryguide.com. The School may vary its procedures, from time to time, with regard to any such external validation and will inform any applicants of this.

Step three. The Bursar and Headmaster will consider the external report based on the financial assessment alongside with our academic assessment for selective entry requirement. There may be addition pastoral or supporting information, for consideration offered or known to the School. The Bursar and Headmaster will consider the award within an annual bursary budget set and reviewed by the Trustees.

Step four. Parents/guardians to be advised of their suitability for an award. This process will be completed by **31st April**. Parents/guardians are then required to sign a letter accepting the place at the school and an acknowledgement agreeing to any conditions relating to the bursary.

The Case for Assistance

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. 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. In the main, the child's suitability for the school is the first consideration in granting support.

- **Suitability.** In assessing a child'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. Currently the School uses CAT assessments with quantifiable metrics. Bursary funds are limited and those judged most suitable will be given priority as those likely to gain most from the educational provision. 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 and benefit from participation in the wider, extra-curricular activities on offer at the school. References from the candidate's current school will form part of the process.

- 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 these within the context of what is viable 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 subjective.

The School has a duty to ensure that all bursary grants 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 values in houses.
- In cases of separation, the contribution made by both parents.
- 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 grant will take into account all these outgoings.
- Acknowledging that others might have a different view, the school considers that indications of affordability such as the following may not be consistent with the receipt of a bursary:
 - frequent or costly holidays;
 - new or costly cars;
 - investment in significant home improvements;
 - a second property/land holdings.
- Other factors. It is recognised that, in addition to academic ability and financial constraints, there may be other circumstances which may be considered including:
 - 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.

2. Existing Pupils - Change in Family Circumstances

Within overall budget funding, the 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 calendar cycle for bursary submission, scrutiny and award. This sum will be set within budgetary constraints. Such awards are subject to the availability of funding and cannot be guaranteed or may be limited to completion of a school year. Parents/guardians with a child at the school whose financial circumstances suddenly change may

initially apply for a hardship award followed by an application for a bursary, explaining their situation and requesting assistance. This application should follow the timelines for new pupils, set out above. Parents will be expected to be pro-active to demonstrate that there is a case for a bursary in line with 'the case for assistance' above.

Annual Review

All bursary awards are subject to repeat testing of parental means each year and may be varied upwards or downwards depending on parental circumstances. Current bursary holders will be issued with repeat means-testing forms at the beginning of December each year for return by the end of the month. For those previously in receipt of bursaries, the Headmaster and Bursar, have the discretion to 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 school, for example by the late payment of any contribution they are making to the fees.

Confidentiality

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

Applications

Applications for Bursaries should be addressed to:

The Bursar
Homefield Preparatory School
Western Road
Sutton
Surrey SM1 2TE

Email: bursar@homefieldprep.school

Telephone: 02086420965 x231

Other Sources of Bursary Assistance

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. Homefield Preparatory 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 Educational Trusts Forum

Website: www.educational-grants.org

The Royal National Children's Foundation

Website: www.rncf.org.uk

Scholarships

The School offers a range of scholarships for pupils of outstanding academic, musical, sporting or artistic merit. These are awarded on the basis of internal examination and assessment. Parents will be informed during the Summer Term and the scholarship will be awarded at the start of the Autumn Term. Candidates would be identified as potential beneficiaries via standardised testing, or in the case of music, art and sport a deposition from the appropriate Head of Department, to the Headmaster, setting out a case with reference to appropriate metrics for those subjects. Typically, we might offer 3-4 scholarships per year for each of sports, art and music with a greater amount being offered for academics.

The total number of scholarships awarded is at the discretion of the Headmaster, but will sit within a total budget agreed by the Trustees each year. Scholarships awarded will be conditional on transfer at age 13. On transferring any earlier, the financial remission of the scholarship already granted by the school will become due and payable immediately.

The award of a scholarship will be dependent on the pupil continuing to make progress that is deemed to be in line with their abilities and potential. The Headmaster has the discretion to recommend the reduction or withdrawal of 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 school, for example by the late payment of any contribution they are making to the fees.

Both bursary and scholarship awards are reported to the Trustees annually and who take steps to overview efficiency of process and probity throughout. We report overall spend in our published Annual Report to the Charity Commission.