

Bursary Policy

for the whole School including EYFS

Policy reviewed by	Bursar
Date Reviewed on	August 2026
SLT Review Period	Annually
Next SLT (Bursar) Review Date Due	September 2027
Governor Review Period	Annually
Governing Committee	Finance and Estates
Approved by Governors On	September 2026
Next Governor Review Due	September 2027

BURSARY POLICY

1. Authority and Public Benefit

1.1 This policy has been authorised by the Governing Body of **Edge Grove School** ("the School"). This document contains an overview of the Bursary Scheme currently in operation at the School and is made available to parents of existing pupils on the School website.

1.2 The School is a registered charity that is committed to providing significant public benefit. The School is aware of its obligations under the Charities Act and seeks to adhere to the public benefit principles identified by the Charity Commission regarding the award of fee concessions.

1.3. Note on Fees & VAT: All bursary percentage calculations apply to the **total tuition fee payable** (inclusive of standard tuition fees, and any applicable statutory taxes/VAT) unless explicitly stated otherwise.

1.4 This policy is included on the School website and the School listing on the ISC website.

2. Types of Bursary Awards

The School generally awards bursaries to parents/guardians of children in Year 3 or above at key entry points.

Bursary awards are subject to an annual review of the parents/guardian's financial circumstances, for every year that their child attends the School. Bursary awards may be removed or varied upwards or downwards, depending on these circumstances.

Funding available for the award of bursaries by the School is strictly limited and cannot be guaranteed for any new applications at any stage. Subject to repeat testing, a degree of priority will be given to the renewal of awards to existing recipients rather than to new applicants.

Requests for financial support are generally considered for 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parents/guardians' circumstances has resulted in difficulty in meeting tuition fees and may result in the child being withdrawn part way through a stage of education.

3. The Application & Assessment Process

The application process is facilitated by Bursary Administration Limited (BAL), as appointed by the School.

Bursaries are available to current or prospective parents/guardians of children from Year 3. They are awarded at the discretion of the Finance Governors, the Head and School Bursar are responsible for the management and coordination of the process.

- Step One - Interview and Application
Parents/guardians seeking a bursary are required to meet with the Head or Bursar before being invited to complete an application form which seeks to establish the financial circumstances of the household. The form requests details of income and capital and must be accompanied by full documentary evidence. The completed forms, together with the necessary documentary evidence; including (but not limited to): P60s, SA302 tax computations, 3–6 months of bank statements, mortgage/rent statements, asset declarations, and business accounts (where self-employed must be returned to BAL (Bursary Administration Limited)
- Step Two - Financial Verification
BAL assesses all applications in order to establish the likely level of support which will be required in order to allow the child to attend the School. This may involve a representative from BAL visiting the parents/guardians' home to ensure the information has been correctly interpreted and the basis of the financial assessment has been fair or a telephone call.

- Step Three - Assessment & Suitability
BAL prepares a recommendation which is considered with the Bursar and Head.
- Step Four - Board Decision
A joint recommendation is presented to the School Governors for approval.
- Step Five - Acknowledgement
The parents/guardians are advised whether their child is to be offered a Bursary.
- Step Six - Offer.
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.

4. **Assessment Criteria**

The Head 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 child's suitability for the school is the first consideration in granting support.

- **Suitability:** 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 Head, be likely to make sound academic progress and possess the potential to develop the quality of his or her work, and benefit from participation in the wider, extra-curricular activities on offer at the School. Each applicant should meet the School's normal entrance requirements. Previous school reports will be consulted.
- **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 available funding. 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 bursary grants 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 substantial equity 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.
 - 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 the following (but not limited to) would not be consistent with the receipt of a bursary:
 - Combined earnings in excess of £85,000 per annum.
 - Frequent or expensive holidays.

- New or luxury 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 should be considered. These include:
 - Where the social needs of the child are relevant (eg: may be suffering from bullying at their present school).
 - Where a parent/guardian is terminally ill or is unable to secure permanent employment due to poor health.
 - Where a separation has resulted in the child having to be withdrawn from the School adding to the stress of coping with the parents/guardians separating.

Existing Pupils - Change in Family Circumstances

Parents/guardians with a child at the School whose financial circumstances suddenly change may apply for a bursary to the Bursar, explaining their situation and completing the relevant application form. Such awards are subject to a similar process as with new admissions to the School detailed above and are equally subject to the availability of funding and cannot be guaranteed.

5. Terms, Conditions & Annual Review

5.1 Annual Re-assessment: 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 early in the Spring Term each year so that decisions regarding the continuation of an award may be made before the end of the Spring Term.

5.2 Withdrawal or Variation of Awards: For those previously in receipt of bursaries, the Head and Bursar, in making their joint recommendation to the School Governors, have the discretion to recommend to the Governors 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.

5.3 Confidentiality: The School ensures that all data related to bursary requests, evaluations, and granted awards is handled with the utmost discretion. It is a condition of the award that parents/guardians observe total confidentiality concerning the specifics and value of any support provided.

6. Alternative Grants & External Funding

In instances where the School's internal funding is either fully committed or inadequate, parents/guardians are urged to investigate support from external educational trusts and charitable organisations. Further information on how to pursue such assistance may be obtained via the website of the Educational Trusts' Forum at <http://educational-grants.org> which maintains a list of charities who may be able to assist.

Bursar - July 2026