



BURSARY COMMITTEE POLICY AND PROCESS

Reasons for allocating Bursaries

Offering substantial help with fees for some pupils is a key part of the School's public benefit to ensure that people of all backgrounds can benefit from the transformative education that the School provides. Bursaries are awarded to pupils who will take full advantage of a St Edward's School education and who will in turn contribute fully to the life of the School.

The School's ambition, subject to additional philanthropic fundraising and the generation of income from sources other than the school fee, is to grow the number of bursaries awarded to a total of 160 over the 10 years to 2033, representing around 20% of the total pupils at the School.

There are two main reasons for allocating Bursaries:

1. because it matters to a pupil: an award would be considered life-changing for the pupil because of all the opportunities they can access at the School e.g. bursaries awarded in conjunction with Royal Springboard or to refugees;
2. because it matters to the School: the pupil brings diversity, talent and enthusiasm to the School; the pupil shows the potential to contribute significantly in other ways to their House or year group.

In addition to general means-tested bursaries, the School has several named bursaries awarded to children because of their specific family background: the Mutch Award for the children of members of HM Armed Forces; the Rotherfield Award for children where one or both parents have died; the Chamberlain Award for the children of priests; and the Toby Smith award for a day pupil with particular talent in sport.

Bursary allocation guidelines

In general, within certain limits of tolerance, the School will seek to allocate bursary awards using the following guidelines.

1. 75% by value of all bursary awards each year should be at 75% of fee remission or more.
2. The number of 90%+ bursaries awarded will grow to 35% of the total number awarded.
3. 90%+ bursaries, when they reach 35% of total awards (by number), will mean 50% of all bursary funding is deployed at that level.
4. 90%+ bursary award holders will also receive a School laptop on admission in the Shell or Fourth Form and full support with purchasing school uniform, sports kit, and leavers ball tickets for themselves and their parents.
5. For pupils on 80% bursaries or more, the School will cover the cost of essential school trips in proportion to their bursary award.
6. In general bursaries up to eight full fee equivalent place will be awarded in Shell. To be clear, 16 50% fee places would be equivalent to eight full fee places.
7. In addition, bursaries up to six full fee equivalent places will be awarded to Sixth Form applicants (current entry of approximately 60 pupils).

8. On top of this, there is ambition, subject to additional philanthropic funding and commercial income, to grow the number of bursaries awarded to a total of 160 over the next 10 years to 2033, representing 20% of pupils at the School.
9. Scholarships, Exhibitions, Arts Awards, free music lessons and hardship bursaries will make up the difference. In addition to the value of all talent based fee remission and means-tested Bursaries, the annual employment costs of the Partnerships Manager and Assistant, the time allocated by other staff in the Beyond Teddies department to support partnerships work, partnerships expenses, laptops, support with uniform and leavers ball tickets for 90%+ Bursary award holders and essential School trips for 80% or more bursary award holders and the costs of the BAL mean-testing process annually will be included in the reporting against the overall target set by Governors of 10% of the School's Gross Fee Income being expended in such ways.
10. Parents must inform the School as soon as possible if their financial circumstances change. Parents should expect home visits from BAL assessors from time to time while their children hold bursaries at the School. All bursaries will be financially reassessed at the end of Years 9 and 11.
11. Continuing bursary support is dependent on a pupil making good academic progress and contributing positively to the life of the School. As is the case for all students, bursary award holders must maintain the required academic standards to ensure their entry in to the Sixth Form.

Hardship bursaries will be made according to perceived need.

Bursary assessment and allocation timeline

1. The deadline for bursary applications will be 1st September of the year in which the child is being assessed for entry. Children are assessed for entry at the following points:
 - a. For Shell entry: Year 6, Year 7, Year 8
 - b. For Sixth Form: Year 11

For Shell entry, it is intended to allocate the percentage of bursaries in approximately the following proportions: Year 6 - 40%; Year 7 - 10%; Year 8 - 50%. These allocations are intended to be flexible and will monitored and reviewed regularly.
2. Applications will be screened by the Bursar before being sent to BAL for means-testing assessment. This is to ensure that only applicants who are likely to be successful in the means-testing process will be assessed by BAL.
3. Applicants in receipt of Free School Meals will not be required to complete a BAL assessment. However, those applicants who are eligible for the Pupil Premium Grant or who receive Universal Credit will be required to complete the BAL process. The registration fee for all State School applicants or current bursary holders within Prep Schools will be reduced to £150 per pupil but waved/reduced depending on the outcome of the BAL assessment.
4. Results of means-testing should be received by the School in mid-October. Each report will include a recommended level of assistance, where this is considered necessary.
5. Following the School's entry assessments for the year, the Bursary Committee will meet (Lower Sixth Entry – mid-November, Shell entry - mid-February) with the Warden, Bursar, Sub-Warden Academic and Registrar to review the bursary applications and to assess the relative merits of all applicants alongside the available funds, to determine which candidates will be offered a place at the School and a bursary, and the level of bursary to be offered. The Partnerships Manager will be invited to attend this meeting in an advisory capacity for those candidates that he/she has been involved with.

6. Parents are advised by the Registry team whether or not their child is to be offered a place in the School and a bursary.

In exceptional circumstances, bursarial support may be available to families who make a late application to the School or who are successful in gaining a place but subsequently face a change of financial circumstance before their child begins at the School. This will be handled in the same way as applications received within the published timeframe, through BAL means-testing or full prior consultation with the Bursary Committee.

Hardship Bursaries

The Bursar is responsible for the assessment and recommendation of hardship bursaries, which must be approved by the Bursary Committee.

Hardship bursaries may be applied for by parents if their ability to pay the school fees of their child (or children) has been unexpectedly affected by circumstances beyond their control, for example redundancy or death of a spouse.

The purpose of a hardship bursary is to minimise the disruption to a pupil's education of a dramatic change in parental finances which would otherwise mean the pupil would need to be withdrawn from the School.

Hardship bursaries are prioritised for those pupils who are already enrolled in the two-year programme of GCSE, A-Level or IB. For this reason, they are generally only awarded for the period of the programme for which the pupil is currently enrolled.

Hardship bursaries are unlikely to be awarded to prospective pupils or pupils in Shell.

On completion of the CSFC, BAL will be engaged to conduct an independent means-testing of an application for a hardship bursary, which will be assessed in the same way as standard bursaries. However, particular attention will be paid to the causes of the change in circumstances.

As well as current earnings, other factors which will be considered in determining the necessary level of hardship bursary that may be appropriate including:

1. 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 for other dependents, or the requirements of their partner's work;
2. 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;
3. in cases of separation, the contribution made by the absent parent; contribution to household costs by other family members or relatives, any adults unrelated to the child, or by outside sources.

Hardship bursary recommendations will be presented by the Bursar to the Bursary Committee on a termly basis for approval.

Appendix 1

Scholarships, Exhibitions and Awards

In addition to the exclusively means-tested bursaries offered to pupils through the framework of the Bursary Policy, non-means-tested fee remission is offered to pupils joining the School with Academic Scholarships or Exhibitions, with Music Scholarships or Exhibitions, and with Awards in Sport, Dance, Drama, Design or Art. Scholarships attract fee remission of 5% of the boarding or day fee which would otherwise be paid in full. Exhibitions and Awards attract fee remission of 2.5%. Those levels are subject to annual review by the Governors, although it is expected that they will be maintained at the awarded level throughout a pupil's time at the School.

Further fee remission

In addition to those fixed proportions, the School may at the sole discretion of the Admissions Committee offer additional non-means-tested fee remission either to pupils joining the School with Scholarships, Exhibitions or Awards or to pupils whose applications fall outside the timeframe for the related assessments but whose talents are sufficiently likely to gain them an Honorary Scholarship or Award at the end of their first term at the School. The Admissions Committee is chaired by the Warden, and its membership includes the Sub-Warden, the Sub-Warden Academic, the Registrar and, for all financial decisions, the Bursar.

Such awards are made in recognition of the potential of the holders of such Scholarships, Exhibitions and Awards not only to achieve individual excellence in their areas of endeavour but also to inspire other pupils with whom they are working, training, rehearsing, competing and performing. The funding for such fee remission is an investment not only in those individual pupils but also in the areas of the curriculum and the co-curriculum in which they will enhance the life of the School and consequently the experience of all pupils. It is also an investment in the marketing and promotion of the School, to assure the operation of the Admissions Policy, the level of the school roll, and the consequent fee income necessary to support the provision of means-tested bursaries awarded purely on financial need.

The Admissions Committee is authorised by the Governors to provide such additional funding every year without reference to the Bursary Committee up to a maximum level equivalent to 1.5 full-fees boarding places in aggregate, and up to a maximum level of 25% of the boarding or day fee (as applicable) for any individual pupil. Such fee remission will not require the completion of the BAL assessment process outlined in the main framework of the Policy, and it will usually be offered by the Warden alongside the pupil's place at the School. Such fee remission may, however, also be granted at the end of their Shell and Fifth Form years).

This arrangement means that the annual cost of non-means-tested fee remission for the holders of Scholarships, Exhibitions and Awards beyond the 5% and 2.5% automatically granted on receipt will be equivalent at its fullest extent to 7.5 full-fees boarding places.

Priority will be given to pupils entering the School in the Shell and in the Fourth Form, but non-means-tested fee remission will be available to pupils at all entry points to the School. Consideration of financial need will be an important element in the assessment of whether and at what level any non-means-tested fee remission should be provided. Consideration will also be given to any prospective candidate's external commitments, for example to sports clubs and other organisations related to their area of talent and interest, and any offer of additional non-means-tested support would make clear both the School's expectations of the pupil's commitment to St Edward's and the extent of any future flexibility around it.

On application to the Bursary Committee and subject to the completion of the BAL assessment process, it may be possible for the Admissions Committee to make additional non-means-tested awards to individual pupils greater than 25% of the relevant annual fee. In aggregate, however, additional non-means-tested fee

remission beyond the standard 5% and 2.5% awards will not amount to more than a further 10% of the total funds available for fee remission, both means-tested and non-means-tested.

Monitoring and review

The contribution of all pupils in receipt of non-means-tested fee remission will be the subject of annual reports for Housemasters, Housemistresses and Tutors for review by the Bursary Committee. The maintenance of such fee remission will ordinarily be conditional on pupils' continuing contribution to the area of school life relevant to the original decision and on their ongoing engagement with the opportunities available to them in the School.

The Governors approved this appendix to the Bursary Policy in September 2023. The Warden will provide commentary on its operation to the Governors every year in the Summer Term before the appendix is formally reviewed in June 2028. A decision on the continuing operation of this framework will then be made.

Version:	4.0
Person responsible for Policy:	Bursar
Approved by:	Governing Body
Review cycle:	Annually
Last reviewed:	May 2023
