



Policy on the means-tested financial support of fee payments ("bursaries")

I. Introduction

The Governors of Highgate School are committed to broadening access to the School by offering to eligible parents / carers means-tested financial support of the payment of school fees. Such support is known as a **bursary**. Bursaries may be awarded in the form of a discount of up to 100% on the fees payable, depending on the financial or other pertinent circumstances of each applicant. Holders of large bursary awards may also be eligible for support with associated costs such as uniform. All parents, including those whose children hold bursary awards, are able to apply for financial assistance towards the cost of educational trips organised by the School.

Bursary awards are subject to the annual review of parents' / carers' means; their means may be assessed formally (the steps are described in paragraph 3), or through a signed self-declaration. Bursary awards may be varied upwards or downwards depending on any changes in financial circumstances. Awards are made on the basis of Highgate School's *Indicative Scale of Awards*, which outlines award levels in relation to a family's financial circumstances. The *Indicative Scale of Awards* is reviewed and revised annually by the Bursar, to reflect changes in fee costs and other relevant factors. It is approved annually by the Governors' Charity Committee, in the Summer Term, and is made available to parents / carers on the school website and in print. Although awards are generally informed by this scale, they may be increased or decreased depending on individual parents' / carers' 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), and also because of compassionate or other pertinent considerations.

Holders of bursaries usually fall into two categories:

- new pupils in the school, to whom a place has been offered but parents / carers are unable to fund the tuition fees;
- existing pupils, where a change in parents' / carers' financial circumstances has resulted in their difficulty in paying the full tuition fees, which may lead to the child being withdrawn part way through a stage of education. The Friends of Highgate School (a registered charity, no. 1056624) also supports a number of families in such circumstances.

New applicants to Highgate School

2. Awareness

Information provided by the School alerting the parents / carers of potential pupils to the possibility of gaining means-tested financial support with the payment of schools fees is provided

- in the School's Admissions materials and publications;
- on the School website;
- in advertisements in the local press;
- through links with primary schools;
- via other appropriate media that reach a socially diverse audience.

3. The Application Process

Bursaries may be made available to parents / carers of children entering Highgate School (please see the School's Admissions Policies for additional information). They are awarded at the discretion of the Head Master and the Bursar. The Director of Admissions and the Director of Sir Roger Cholmeley's Charity are responsible for the management and coordination of the process, and for advising the Head Master and the Bursar. Key dates at each stage are made clear to parents / carers.

- *Stage 1 (September to December in the academic year of the child's application)* : Parents / carers seeking a bursary are sent a *Statement of Financial Circumstances*. They are required to answer the questions (where applicable) on the form, and to collate supporting documents. The Director of Sir Roger Cholmeley's Charity contacts parents / carers to arrange a visit to their home. The purpose of this visit is to help parents / carers complete the *Statement of Financial Circumstances* correctly, to see and take copies of evidence presented in support of the Statement, and to answer questions. In doing so, Highgate School hopes to make as fair as possible the financial assessments that underlie the bursaries that it awards. Not every set of parents / carers will be visited, but any parent / carer can request a home visit. The *Statements of Financial Circumstances* and copies of supporting documentation are held by the Bursar.
- *Stage 2 (February in the academic year of the child's application)* : After the relevant entrance tests and subsequent interviews have been completed (by all applicants, not just those that have asked for financial support), The Bursar receives the names of applicants to whom it is expected that offers of places will be made. These are cross-referenced with the names of applicants who have asked for financial support, and then the Bursar assesses the *Statements of Financial Circumstances* of these families in order to establish the likely level of support each will require. At this stage, the Bursar may require a further meeting with particular applicants to discuss some of the information provided.

Parents / carers are advised that their child being called for an academic interview in the light of the assessment tests should not be interpreted as an indication that a bursary will necessarily be awarded. The Director of Admissions is committed to giving applicants for bursary awards the opportunity to demonstrate their potential at every stage of the selection process, and so an applicant may be interviewed even though the evidence from the written tests or the *Statement of Financial Circumstances* suggests that it is unlikely that a place and / or a bursary award will be offered.

- *Stage 3 (February and March in the academic year of the child's application)*: The Bursar prepares recommendations about these applicants with regard to Highgate School's *Indicative Scale of*

Awards. This is considered with the Head Master, and a joint recommendation is then reached.

- *Stage 4 (March in the academic year of the child's application):* The joint recommendation is finalised at or shortly after the meetings of the Selection Panels.
- *Stage 5 (March in the academic year of the child's application):* Parents / carers are advised whether their child is to be offered a place at the School, and of the bursary offer.
- *Stage 6 (March in the academic year of the child's application):* Parents / carers are required to sign a letter accepting the place at the School, and an acknowledgement agreeing to the conditions relating to the bursary.

4. The Case for Assistance

The Head Master and the Bursar will consider a number of factors when making the judgement as to the justification for support, and the extent of such support. Usually, an applicant's suitability for the school is the first consideration when granting support.

- *(i) Suitability* In assessing an applicant's suitability, careful attention will be given to the results of academic assessments and entrance tests. Appropriate consideration will be given to the applicant's social and educational background. Bursary funds are limited and those deemed likely to gain most from the educational provision offered at Highgate School will be given priority. Each pupil to whom support is offered must, in the opinion of the Head Master, be likely to make sound academic progress following admission, to develop the quality of his or her work, and to benefit from participation in the wider extra-curricular activities on offer at Highgate School. In normal circumstances, each applicant should meet the School's usual academic requirements. Previous school reports will be consulted.
- *(ii) Financial Limitations* The amount of the bursary award is not influenced by the level of the academic ability of the applicant, 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 given the overall budget.

It is recognised that judgements about the 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 capacity of the family. For example, where there are two parents / carers, 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 the 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 values in properties.
- The contribution made by the absent parent, in cases of separation.
- Contribution to household costs by other members of the wider family, by other adults unrelated to the child, or by outside sources.
- Other educational outgoings, in particular fees paid to other schools (or universities).

This list is indicative but is not exhaustive.

Highgate School considers that the following would not be consistent with the receipt of a bursary:

- frequent or expensive holidays;
 - new or luxury cars;
 - investment in significant home improvements;
 - a second property, or land holdings.
- (iii) *Other factors* Highgate School recognises that, in addition to academic ability and financial constraints, there may be other circumstances which should be considered. The following examples are indicative but not exhaustive.
 - Whether an applicant has siblings at the School;
 - Where the social or academic needs of the applicant are significant;
 - The applicant's social or educational context and background;
 - Whether the duration or complexity of the applicant's journey to School is significant enough to be a limit on social interaction and / or participation in extra-curricular activities if a place were awarded;
 - Where a parent / carer is terminally ill or is unable to secure permanent employment because of poor health or a registered disability.

5. Existing pupils: adverse changes in family circumstances

Within overall budget funding, Highgate School does in normal circumstances set aside reserves to support cases of sudden, unforeseen need (for example, for families in which one or both of the main earners has become seriously ill, or has died), or where applications meriting bursary assistance are, in exceptional circumstances, received out of the normal calendar cycle for bursary submission, scrutiny and award. This sum will be set within budgetary constraints.

Parents / carers with a child at the School whose financial circumstances suddenly change adversely may apply for a bursary. They should explain their situation to the Bursar in writing, and then they will be asked to submit a completed *Statement of Financial Circumstances* with appropriate supporting documentation. Parents / carers may ask for a home visit to assist them, or it may be decided that consideration of their application is dependent on a home visit being carried out. The Bursar may also require a meeting at School with the parents / carers to discuss the information they have provided.

Highgate School works in association with The Friends of Highgate School to give financial support to pupils whose family circumstances have deteriorated suddenly. Usually the Bursar will discuss with the Secretary of The Friends of Highgate School a bursary application made by parents / carers of an existing pupil. Awards are made (either by the School or by The Friends of Highgate School) subject to the availability of funding, and it cannot be guaranteed that any will be made in a given year.

6. Annual Review

All bursary awards are subject to review of parents' / carers' means each year, and may be varied upwards or downwards depending on changes in financial circumstances. Parents / carers of bursary holders in Years 8, 10 and 12 are required to complete a *Statement of Financial Circumstances* in January (Year 8) and June (Years 10 and 12), for return by the end of that month, and are visited at home. The Bursar may require a further meeting with parents / carers to discuss the information they have provided. Parents / carers of bursary holders in other years are asked to sign a declaration that their financial circumstances have not changed since the preceding home visit.

For those previously in receipt of bursaries, the Head Master and the Bursar have the discretion to reduce or withdraw an award where a pupil's progress, attendance, attitude or behaviour has been unsatisfactory despite appropriate consultation and pastoral support, where the School's Terms and Conditions have been breached, and also where the parents / carers have disregarded the school's expectations, for example by repeatedly making late payments of their contribution (if any) towards the fees. The School may give parents / carers not less than one term's notice that an award is to be withdrawn. Complaints concerning such a decision should be made in accordance with the School's Complaints Procedure.

7. Confidentiality

All staff (namely the Head Master, the Bursar, the Director of Sir Roger Cholmeley's Charity and the Secretary of The Friends of Highgate School) who may have access to the *Statement of Financial Circumstances* and associated documentation will sign an annual declaration that they will hold the data securely and treat them confidentially.

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

8. Parents / carers who live separately

Highgate School recognises that the financial arrangements of and between parents / carers who live separately, or who are intending or expecting to do so, can be complex. However, in general, the financial circumstances of both parents / carers of an applicant will be assessed, and both assessments will inform the size of award made (which may be no award). If either of an applicant's parents / carers are absent, then Highgate School will decide to what extent the absent parent's / carer's financial circumstances should be assessed. In all situations, the financial information collected from each parent / carer will be kept confidential, and will not be disclosed to the second parent / carer without explicit consent. Further guidance can be sought from the Director of Sir Roger Cholmeley's Charity.

9. Other sources of financial assistance

In addition to the School's bursary fund and The Friends of Highgate School, 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 who may be unable to remain because of an adverse change in family circumstances.

Highgate School expects parents / carers to apply for such support where it is felt that a good case for assistance can be made. Further information can be obtained by speaking to the Director of Sir Roger Cholmeley's Charity.

A comprehensive list of educational trusts and charities can be found in The Educational Grants Directory, published by the Directory of Social Change (www.dsc.org.uk). This book should be available in local libraries. The website www.grantsonline.org.uk can also be searched. The Royal National Children's Foundation (www.rncf.org.uk) may be able to offer advice; parents / carers should contact

Royal National Children's Foundation
Sandy Lane
Cobham
Surrey
KT11 2ES

Tel: 01932 868622
Fax: 01932 866420
Email: admin@rncf.org.uk

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Supplementary documentation: *Confidential Statement of Financial Circumstances in support of an application for a Bursary* (effective from September 2009).