

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

1 Introduction

The Governors of Highgate School are committed to broadening access to the School by offering to eligible parents and 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 and carers, 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' and carers' means; their means may be assessed formally (the steps are described in Section 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 bursary awards, which outlines levels of support in relation to a family's financial circumstances. The indicative scale of bursary awards is reviewed and revised annually, to reflect changes in fee costs and other relevant factors. It is made available on the school website. Although awards are generally informed by this scale, they may be increased or decreased depending on individual parents' and 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 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 and carers are unable to fund the tuition fees;
- existing pupils, where a change in parents' and 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circumstances has resulted in their difficulty in paying the full tuition fees, which may lead to the child being withdrawn part way through a stage of education.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. See section 5 for further details.

2 Awareness

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

- in the School's Admissions materials and publications and the Admissions Office's communications;
- 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 and 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 and the Bursar. The Head of Admissions and the Admissions Officer (Widening Access) are responsible for the management and coordination of the process, and for advising the Head and the Bursar. Highgate School waives the Registration Fee (£150) for families whose gross family income (including dividends) is less than 1.5 times the annual school fees. Key dates at each stage are made clear to parents and carers.

- *Stage 1:* Parents and carers indicate on the application form that they are seeking a bursary.
- *Stage 2:* Parents and carers are sent a *Financial Details* form to assess initial eligibility.

For 16+, this must be completed in advance of the Assessment Day in November. The Admissions Officer (Widening Access) contacts parents and carers to arrange a meeting to finalise the *Financial Details* form in full, to see and take copies of evidence presented in support of the details provided on the form, and to answer any questions. In doing so, Highgate School hopes to make as fair as possible the financial assessments that underlie the bursaries that it awards.

For 11+, this form must be completed and returned before the entrance exams in December. The Admissions Officer (Widening Access) then contacts parents and carers of 11+ bursary applicants who have been invited to interview to arrange a meeting in January. This meeting involves finalising the *Financial Details* form, taking copies of evidence and answering further questions.

Parents and carers should familiarise themselves of the likely timing of a meeting should their child be called for interview (January). Parents and carers will be advised what documents they will need to bring to the meeting in advance of the entrance exam so that sufficient time is available to collate the required evidence.

At both entry points these meetings will usually take place at Highgate School, but a home visit can be arranged if requested.

- *Stage 3:* After the relevant entrance assessments 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 *Financial Details* forms of these applicants to establish the likely level of support each family will require. At this stage, the Bursar may require a further meeting with applicants to discuss some of the information provided.

Parents and carers of 11+ applicants are advised that their child being called for an academic interview subsequent to the entrance exam should not be interpreted as an indication that a place or a bursary will necessarily be awarded.

- *Stage 4:* The Bursar prepares recommendations about these applicants with regard to Highgate School's indicative scale of bursary awards. This is considered, if necessary with the Head, before a final decision is then reached at the Admissions Panel.
- *Stage 5:* Parents and carers are advised whether their child is to be offered a place at the School, and of the bursary offer. Please note that the academic selection process is separate from the bursary process, so if a prospective pupil meets our academic standards, he or she will still be offered a place, regardless of being awarded a bursary.
- *Stage 6:* Parents and 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

A number of factors will be considered 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* The School will consider an applicant's academic performance in our selection process. 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 Admissions Panel and the Head, be likely to make sound academic progress following admission, to develop the quality of his or her work, and to benefit from participation in co-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.

Preference will be given to bursary award applicants who have been pupils in a state school for at least two years prior to the date of prospective entry to Highgate School.

Apart from in exceptional circumstances, it is expected that bursary applicants ordinarily will have been resident and educated in the UK for at least two years prior to the point of entry to Highgate School.

It is unlikely that Highgate School will award a bursary to a pupil who is currently in receipt of a bursary at an independent school, especially if it is possible for the pupil to continue studying at that school, except in exceptional circumstances.

- *(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 is unlikely to award a bursary if the family gross income is more than four times the school fees. Furthermore, 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 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 or 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).

The School may decide to provide an enhanced level of bursarial support over a wider range of total family income if both parents and carers are key workers living in the local area. The School defines a key worker as someone who is employed by the public sector, in a frontline role delivering an essential public service. Examples of such roles include: clinical NHS staff (other than doctors and dentists), teachers in schools, further education and sixth form colleges, police officers and Community Support Officers, prison officers, probation service staff, firefighters, ambulance service crew and members of the armed forces. 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 co-curricular activities if a place were awarded;
 - Where a parent or carer is terminally ill or is unable to secure permanent employment because of poor health or a registered disability.

5 Parents and carers who live separately

Highgate School recognises that the financial arrangements of and between parents and 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 and 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 and 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 and carer will be kept confidential and will not be disclosed to the second parent and carer without explicit consent. Further guidance can be sought from the Admissions Officer (Widening Access).

6 Confidentiality

All staff (namely the Head, the Bursar, the Bursar's Executive Assistant, the Head of Admissions, the Admissions Officer (Widening Access) and the Secretary of The Friends of Highgate School) who may have access to the *Financial Details* form and associated documentation will sign a 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.

Upon joining Highgate, a small number of members of staff (for example, the Head of Section, the Head of Year, the Head of House and the Form Tutor) will be made

aware which pupils are in receipt of a bursary. This is for pastoral reasons only and the information is kept confidential. These staff members are not party to any of the family's financial details.

Many bursaries at Highgate are supported by the generosity of donors. By sending pseudonymised reports to donors regarding the progress of the pupil whom they financially support, we are able to demonstrate the impact of their donation. We aim to ensure that there is no way of the donor identifying the pupil from the report; we do not include the pupil's name or gender, the subjects they learn, or the teachers whom they are taught by. Any other identifiable features are also omitted. Parents and carers (and pupils where applicable) of donor-supported pupils are contacted to seek their permission for anonymised reports to be sent to donors.

7 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 and 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 *Financial Details* form with appropriate supporting documentation. Parents and carers may ask for a meeting to assist them, or it may be decided that consideration of their application is dependent on a meeting being organised. The Bursar may also require a meeting at School with the parents and 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 or 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. Please also note that the length of these bursary awards is made at the discretion of the Bursar. There is no guarantee that this support would cover the pupil throughout their entire time at Highgate and priority may be given to pupils enrolled in exam years.

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 existing parents and 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 Admissions Officer (Widening Access).

8 Annual Review

All bursary awards are subject to the review of parents' and carers' means each year and may be varied upwards or downwards depending on changes in financial circumstances. Routinely parents and carers of bursary holders in Years 8, 10 and 12 are required to complete a *Financial Details* form in May (Year 8) and June (Years 10 and 12), for return by the end of that month, and meet with the Admissions Officer (Widening Access). The Bursar may require a further meeting with parents and carers to discuss the information they have provided. Parents and carers of bursary holders in other years are asked to sign a declaration that their financial circumstances have not changed since submitting the preceding *Financial Details* form. If circumstances have changed, parents and carers are advised to contact the Admissions Officer (Widening Access) to complete a new *Financial Details* form.

For those previously in receipt of bursaries, the Head 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 and 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 and carers not less than one term's notice that an award is to be withdrawn. See Section 9 and 10 for further details. Complaints concerning such a decision should be made in accordance with the School's Complaints Procedure.

9 Monitoring the performance (academic) and conduct (behaviour) of a bursary award holder

When parents and carers submit an application for a bursary award on the *Financial Details* form, they sign a declaration which includes the following statement:

We / I understand that if we / I are / am offered a bursary for our / my child and accept a place for him / her at Highgate School, the following terms and conditions (in addition to the standard Terms and Conditions) will apply as between ourselves / myself and Highgate School

These bursary terms and conditions include the following statement:

- *the bursary may be withdrawn or reduced if:*
 - *we / I act or our / my child acts in breach of the School's Terms and Conditions attached to the Acceptance Form for our / my child at Highgate School;*
 - *(...)*
 - *in the opinion of the Head, and after appropriate consultation and support, our / my child's progress, attendance, attitude or behaviour no longer merits the continuation of the award;*

The Admissions Officer (Widening Access) monitors the performance of all the bursary award holders, by tracking their attainment and effort as recorded in pupils' regular Learning Reviews; by reading the written comments from teachers on Learning Reviews and Full Reports; and through discussion with colleagues with pastoral oversight of the bursary award holders, usually the relevant Assistant Head

(of Lower School, Middle School, or Sixth Form) and the Heads of House. If a significant drop in an award holder's performance or conduct is perceived, the Admissions Officer will raise this with the appropriate Assistant Head in the first instance and with the Head of House. Outcomes of this discussion could include:

- no action being taken, but the pupil being monitored in the run-up to the next reporting point;
- the issue being raised with the pupil (by the appropriate Assistant Head or Head of House), and an action plan being agreed;
- the Assistant Head or Head of House raising the issue with the pupil's parents, and an action plan being agreed.

Initially, the emphasis of any response will be providing support to the pupil to help him or her address the underlying cause(s) of the drop in performance or conduct. If there is no noticeable improvement by the time of the next Learning Review despite this support, and / or if any such improvement is not sustained in the medium term, then the Admissions Officer will discuss the pupil's performance or conduct with the appropriate Assistant Head. Outcomes of this discussion could include:

- a meeting with the pupil and also the parents and carers, after which a formal letter reporting on the meeting would be sent by the Assistant Head to the parents and carers, and added to the pupil's record;
- a more detailed package of support being prepared, in which the pupil's participation would be required rather than recommended;
- exploring with parents and carers alternatives for the pupil's education, for example for the pupil to move to a sixth form college for Sixth Form study after finishing Year 11;
- the school engaging the services and guidance of external professionals, for example specialist counsellors.

10 The School's actions if the performance (academic) or conduct (behaviour) of a bursary award holder does not meet expectations

Following the process of consultation and support detailed above, in the event that improvements in performance or conduct are not forthcoming or sustained, the Admissions Officer will present a case review (agreed by the Assistant Head of the relevant section of the school) to the Head. Following this, the Head will take action if "in [his / her] opinion ... [the] child's progress, attendance, attitude or behaviour no longer merits the continuation of the award". This action could include written notice being sent to the parents and carers that the bursary award will be withdrawn from the start of the next or the next-but-one school term.

It is possible for a bursary award holder's conduct to be sufficiently poor for the bursary award to be withdrawn, but still to be within the limits of tolerance of the conduct expected of a fee-paying pupil at the school. The bursary being withdrawn does not automatically mean that the pupil's place is also withdrawn. This is because bursary award holders are required to follow Terms and Conditions set out in the Declaration of the *Financial Details* form that are "in addition to the standard Terms and Conditions". In such cases, the circumstances would be reviewed by a Governor from the Charity and Development Committee.