

Bursaries (Fee Assistance) and Means-Tested Scholarships Policy

Emanuel School is committed to providing an exceptional education to the most talented children regardless of social or demographic background or financial circumstances.

The governors of the school are committed to broadening access to the school's education by offering eligible parents financial support for the payment of school fees (bursaries) based upon budget for a fixed number of pupils who meet the school's entry criteria. A bursary differs from a scholarship in that it is based on the financial need of the applicant.

A bursary award may be awarded for up to 100% of the school tuition fees and in addition include a provision for the payment of extras such as external exam fees, chrome book lease charge, uniforms. Discretionary contributions may also be made towards the costs of trips and other items. The contribution towards any extras would be pro-rated based on the bursary award. Bursary awards of 50% or more, will attract a discount on the acceptance deposit, pro-rated based upon the award level.

Generally, unless there is a significant change in circumstances midway through a pupil's time at the school, bursaries are not available outside normal entry points (Year 6/ year 7/ sixth form).

Bursary awards are subject to repeat testing of parental means each year, with updated financial information being required for every year that their child attends the school. The school does not guarantee that a bursary will be held for the duration of a pupil's career at the school and the amount may be adjusted depending on the information given in the financial reassessment.

In recent years, Emanuel has sought to grow its capacity to offer fee assistance to prospective and current pupils. Details of the school's campaign *Giant Strides* can be found on the school's website and by contacting the development team (development@emanuel.org.uk).

Bursary Eligibility Considerations

Bursary funds are limited and the school exercises discretion in awarding a bursary. Pupils must be likely to make sound academic progress following admission, based on the headmaster's opinion, and possess the potential to develop their quality of work. All applicants for fee assistance should meet the school's normal academic requirements.

The amount of the bursary award is influenced by the extent of financial need. Each case is assessed on its own merits with awards made accordingly, subject to the school's available budget.

It is recognised that judgements about what sacrifices a family should make to pay school fees will be personal. The award of a bursary is not meant to sustain or support personal lifestyle choices; therefore, in addition to the level of current gross earnings, the following factors will also be considered in determining the level of the award:

- 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, requirements of their partner's work or responsibilities for younger children or dependants.
- Significant capital savings or investments, and equity values in houses, would be expected to be used for the payment of school fees. For example, families with more than one property may be expected to release equity in one of these properties.
- The financial circumstances of both parents will be assessed, including in circumstances where the parents do not live together, unless there is sufficient evidence that it would not be reasonable to do so. Parents making an application without the consent of another parent should be aware that divorce or separation is not sufficient evidence of the other parent's inability to support the child financially.

- Contribution to household costs by other, wider family members, any adults unrelated to the child or by outside sources.
- Any fees already being paid to other schools, including Emanuel School, will be taken into account when considering the level of award for new bursary applicants.
- The gross earnings threshold is currently set at £80,000. Pupils whose parents have earnings above this threshold would not be eligible for any bursary support.

Bursary Application Process

The headmaster, bursar and head of finance are responsible for the management and coordination of the bursary application process.

Parents seeking fee assistance are required to register their child as a candidate for entry at Year 6/ Year 7/ sixth form before completing the online bursary application form which must be completed in the autumn term for starters in the following September. Deadlines for completing the bursary application form are published on the school website.

Following completion of the online bursary application form, applicants will be sent a link from the school's secure bursary portal to submit their formal bursary application which seeks to establish the financial circumstances of the household and requires full documentary evidence.

The head of finance and bursar will assess all applications to establish the likely level of support required by the pupil. The bursar or head of finance may ask to meet with the parents to discuss details of the bursary application, the supporting documents and possible duration of the award. A home visit may also be arranged as part of the application process. Families who do not make themselves available for a home visit will not be able to proceed with their bursary application.

The head of finance and bursar prepare a recommendation for bursary award, which is discussed and agreed with the headmaster.

Once pupils have been offered a place and informed of any bursary award, the parent(s) must confirm that they have read and understood the terms and conditions relating to a bursary award.

Means-Tested Scholarships

Bursary applicants/recipients can also hold/be offered a scholarship due to exceptional talent in academia, music, sport, drama and/or art and design. A combination of both awards is defined as 'means-tested scholarship'.

Throughout the tenure of the award, pupils who hold means-tested scholarships are expected to retain a ranking position in progress reports and/or internal examinations within the top half of the year group.

Means-tested scholarships will not be awarded or renewed if the pupil's performance is outside the top half of the achievement rankings. In addition, if a pupil's behaviour record is poor in the opinion of the headmaster, the bursary award may be withdrawn with one term's notice.

Annual Review of Bursary Awards

The bursary award is discretionary and is subject to an annual re-assessment of the family's financial circumstances. The value of any award is calculated against a sliding scale, which means if the family income increases the amount of assistance may diminish and vice-versa. Though awards are generally tied to this scale, they may be varied upwards or downwards depending on individual family circumstances (e.g. their savings, investments and realisable assets, as well as their income, the size of the family, any other persons dependent on them and like factors), compassionate or other pertinent considerations.

The bursary/means-tested scholarship can be reduced or withdrawn, with one term's notice, if any of the following apply:

- a) The parents' income, savings and financial situation has significantly improved since the bursary was first given and/or exceeds the stated thresholds.
- b) For means-tested scholarships (academic) if the pupil's academic performance is such that the pupil is no longer placed in the top half of the year group (based on rankings of progress reports and/or internal exams).
- c) For means-tested scholarships (co-curricular) if the scholarship in art and design, music, drama or sport is withdrawn.
- d) A pupil's behaviour record is, in the opinion of the headmaster, unsatisfactory.
- e) Late or non-payment of any contribution towards fees.
- f) Other reasons where the parents have failed to support the school or otherwise have not acted in accordance with their obligations under the school's *Terms and Conditions* and or *Terms and Conditions for Scholars and Bursary Holders*.

Existing Pupils – Change in Family Circumstances (Hardship Award)

If a place is accepted for a pupil without a bursary award, financial assistance will only be provided where a family's ability to pay has declined suddenly and significantly due to unforeseen circumstances. These hardship awards are subject to the availability of funding and intended to provide short-term support. These are reviewed on a termly basis and can be granted up to a maximum of one school year's fees per family during the course of the pupil's education.

Families with a child at the school who wish to apply for a hardship award will be asked to email the head of finance or bursar in the first instance. Applicants would then be invited to apply using the bursary application forms.

Decisions regarding Bursary Support

The school receives a large number of applications for bursaries annually. Each request is assessed on its own merit, and it is the school's intention to support as many pupils as it can. However, funding is limited, and it is not possible to make an award for every application or to provide justification for each decision. The school's decision is final.

Confidentiality

The data provided in the bursary application and on the bursary management platform is only used for the purposes of assessing the application for financial assistance.

Once a bursary place is awarded, only certain members of senior staff will be aware of bursary recipients and this information is treated with great discretion. There are some circumstances where a donor who has supported a bursary award may ask us to share information about the recipient of the award. In these circumstances, the school will ask parental consent, as well as the pupil's consent, before doing so.

The school requires bursary recipients not to disclose the fact of the award or any terms that have been agreed between themselves and the school without first obtaining the prior consent of the school.

Data Retention

The school does not keep information for longer than is necessary for the purpose it was collected for. Data that was collected to assess bursary applications and annual re-assessments will be kept in line with the school's data retention schedule.

During the retention period, the data is subject to robust safeguards and controls to ensure it is managed securely and in accordance with relevant data protection regulations.

Related Policies and Documents

- Admissions Policy
- Bursary Application Form
- Scholarship and Exhibitions Policy
- Privacy Notice for Parents/Pupils
- Terms and Conditions for Scholars and Bursary Holders

Policy Review & Approval

The bursar and head of finance will review the policy each year during the summer term and will be presented to Cabinet and the governor's finance & building committee for approval.

Policy Owner	Bursar
Date of last review	Spring 2023
Approved by	Cabinet: May 2023 Finance & Building Committee: May 2023
Responsible Committee	Finance & Building
Date of next review	Spring 2024

Table of Key Changes

Date	Change
September 2023	<ul style="list-style-type: none"> ▪ 'Bursary Application Process' was updated to reflect the implementation of a third party bursary management platform. ▪ Paragraph 'Data Retention' was added.