Heathfield Knoll School

Bursary Policy

This policy is supported and complemented by the following policies:

- Admissions
- Equal Opportunities
- Recruitment

Key personnel:

Headteacher	Lawrence Collins
Chair of Governors	Claudia Bickford - Smith
Office Manager	Julie Onions

This document is reviewed at least annually by J.Onions, Office Manager or as events change or legislation requires. This is then approved by the Governing Board.

The CEO of KSI Education Ltd and Chair of the Governing Board is Claudia Bickford-Smith.
The Governors have the skills to support and advise the school in its decision making.

Reviewed July 2024
Next review due: August 2025

Contents

2

1. Introduction 2
2. Award of bursaries 3

2.1 New Applicants to the School 3

The Application Process. 3

The Case for Assistance. 4

Existing Pupils - Change in Family Circumstances 5

3. Annual Review 5

4. Confidentiality 6

ANNEX A Heathfield Knoll School Bursary Paperwork 6

ANNEX B Bursary Application-Documentary Evidence Required 13

ANNEX C Guidance For Completion of Bursary Application Form 14

Amendments to the Policy 18

1.

1. Introduction

The Governing Board of Heathfield Knoll School are committed to broadening access to the school by offering to eligible parents/guardians means-tested financial support with the payment of school fees. Such support is known as a bursary and bursaries may be awarded at the discretion of the Governors and Headteacher.

Due to the financial constraints of the school the award of a bursary is not automatic.

2. 2.Award of bursaries

Bursary awards are subject to repeat testing of parental means each year and may be varied upwards or downwards, depending on parental circumstances. Awards are made on the basis of the confidential Heathfield Knoll School scale of awards which sets out award levels in relation to a family's financial circumstances. The scale of awards is reviewed and revised annually by the Office Manager and the Governing Board to reflect any changes in fee costs and is approved by KSI Directors. Though awards are generally tied to this scale, they may be varied upwards or downwards depending on individual parents'/guardians' 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), compassionate or other pertinent considerations.

Requests for financial support usually fall into two categories:

- New applicants to the school where a place has been offered but parents/guardians are unable to fund the tuition fees.
- 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.

1. 2.1 New Applicants to the School

Awareness - information provided by the school alerting the parents/guardians of potential pupils to the possibility of gaining means-tested financial support with the payment of schools fees is included in:

- The school prospectus. The actual application form for financial assistance is made available from the school office.
- The Heathfield Knoll School school website.
- The local press by means of advertisements (as appropriate).

2.1.1 The Application Process.

Bursaries may be made available to parents/guardians of children entering any year group of the main school (Reception to Year 11) of Heathfield Knoll School. They are awarded at the discretion of the Governors and the Headteacher. The Office Manager is responsible for the management and coordination of the process.

- **Step one** - parents/guardians seeking a bursary are required to complete an application form which seeks to establish the financial circumstances of the household. The form, which requests details of income and capital, is available from the main office and must be accompanied by full documentary evidence. The completed forms, together with the necessary

documentary evidence, are to be submitted to the Governing Board at the earliest convenience.

- **Step two** - the Office Manager 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 Governor visiting the parents'/guardians' home to ensure the information has been correctly interpreted and the basis of the financial assessment has been fair.
- **Step three** - the Office Manager prepares a recommendation in accordance with the Heathfield Knoll School confidential scale of awards which is considered with the head and a joint recommendation is then reached.
- **Step four** - the joint recommendation is presented to the Governing Board for approval.
- **Step five** - the parents/guardians are advised whether their child is to be offered a place at the school and of the bursary offer. The letter to parents is sent within 28 working days of the application being received at school.
- **Step six** - 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.

2.1.2 The Case for Assistance.

The Headteacher and the Governors 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 - in assessing a child's suitability, attention will be given to the academic assessment result of each applicant but potential will also be considered as well as actual achievement. 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 following admission 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. In normal circumstances, each applicant should meet the school's normal academic requirements. Previous school reports will be consulted for evidence of good behaviour.

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 ability to fund these within the context of what is viable within the context of its overall budget. 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 focused 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 equity values 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 would not be consistent with the receipt of a:
    - frequent or expensive holiday;
    - new or luxury car;
    - 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 a child has siblings at the school.
- Where the social needs of the child are relevant (e.g: 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.

2.2 Existing Pupils - Change in Family Circumstances

Within overall budget funding, the school will in normal circumstances set aside each year a hardship fund, for cases of sudden, unforeseen need or where applications meriting bursary assistance are received out of the normal calendar cycle for bursary submission, scrutiny and award. This sum will be set within budgetary constraints. Parents/guardians with a child at the school whose financial circumstances suddenly change may apply for a bursary to the Governors, explaining their situation and using the forms. Such awards are subject to the availability of funding and cannot be guaranteed.

3 Annual Review

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 at least one month in advance of the annual review date. For those previously in receipt of bursaries, the Head and Office Manager, in making their joint recommendation 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.

4 Confidentiality

The school respects the confidentiality of bursary awards made to families and recipients are expected to do likewise. Failure to respect the confidentiality of any bursary award will result in the award being removed.

3. ANNEX A Heathfield Knoll School Bursary Paperwork

Confidential Statement of Financial Circumstances in support of an application for a Grant

Please read the Notes for Guidance before completing this questionnaire

1. CHILD

a	Full Names	
b	Date of Birth	
c	Term/Year of Entry	

2. PARENT CONTACT DETAILS (see note 1)

		Father/Step Father	Mother/Step Mother
a	Name		
b	Title		
c	Address		
d	Post Code		
e	Day time Phone #		
f	Evening Phone #		
g	Mobile #		
h	Email Address		

3. PARENTS OCCUPATIONS

a	**Employed (complete employers address and phone #)**		
b	**Self-employed (complete type of business)**		
	Are you a Director or Shareholder or Proprietor of this Company or Business?	**Yes/No**	**Yes/No**
	If YES state proportion of Company or Business you and/or your spouse/partner own		
c	**Unemployed**		
d	**Retired**		

4. INCOME (see note 2)

(Please enter below your current earnings and expected income from all sources for this tax year)

		Father/Step Father	**Mother/Step Mother**
a	**Gross Salary and other emoluments (including all taxable benefits and expenses)**		
b	**Taxable profits of trade or profession for last two accounting periods**	a b	a b
c	**Gross pension, widow's pension, State pension etc.**		
d	**Gross investment income from:** **Building Societies/Banks** **Dividends & Interest (other securities)**		
e	**Gross rental profit**		
f	**Social Security benefits (including Child Benefit & Child Tax Credits)**		
g	**Separation or Maintenance Allowance**		
h	**Is there a Court Order/Separation Agreement? If YES, please state annual amount payable for school fees**	**Yes/No**	**Yes/No**

i	**Benefits in Kind provided free by reason of employment not already included in (a) above**		
j	**Any other income or gains not included in (a) to (i) above e.g.: trust or estate income, gains on sale of capital assets, surrenders of life assurance policies etc.**		
k	**Please send a copy of your self-assessment tax calculation for the previous year**		

5. OUTGOINGS (see note 3)

a	**Tax payable on Incomes declared above (including tax deducted at source)**		
b	**National Insurance Contributions**		
c	**Pension or superannuation contributions (net)**		
d	**Mortgage repayments (including capital repayment as well as interest)**		
e	**Endowment mortgage insurance**		
f	**Any other interest payable e.g. Overdrafts, credit cards, loans, etc. (please specify)**		
g	**Annual landlord rent payable on principal residence**		

6. CAPITAL ASSETS (see note 4)

		Father/Step Father	**Mother/Step Mother**
a	**Approximate market value of all investments:** **Building Society/Bank deposits/National Savings Accounts** **Equity investments (shares, unit trusts, corporate bonds and other securities) and Government stocks**		

	PEPs, ISAs, TESSAs, TOISAs		
	Life assurance bonds and policies including endowments		
b	**Approximate market value of principal residence (freehold or leasehold)**		
c	**Approximate market value of other possessions including house contents, car, collections, paintings, jewellery etc.**		
d	**Cash at banks or elsewhere (current accounts only)**		
e	**Approximate market value of any other assets (please specify and include the market value of any Insurance policies maturing in this tax year or the last five years)**		
f	**Net worth/value of any businesses which you own or share**		
g	**Approximate market value of your interest in any other property, land or buildings either at home or abroad**		
h	**Redundancy or other termination payments**		
i	**Monies that are owed to you**		
j	**Other assets not listed e.g. Share options, trust interests/assets held on your behalf by a third party, assets likely to be received in the foreseeable future etc.**		

7. CAPITAL LIABILITIES (see note 5)

Please give details of any capital charges against the assets declared in Section 6

		Father/Step Father	**Mother/Step Mother**
a	**Mortgage Details**		
b	**amount outstanding on principal residence**		
c	**a final payment date**		

d	other liabilities (please specify)		

8. NET ASSETS

Please explain any reasons why net assets cannot be converted or utilised to pay school fees

a	Total Assets (6)	
b	Liabilities (7)	
c	Net Assets (6+7)	

9. DEPENDENT CHILDREN (see note 6)

Include the child to whom this application refers: if more than 4 children, give details on a separate sheet

		1	2	3	4
a	Forename				
b	Date of Birth				
c	School or College				
d	Boarding or Day				
		£	£	£	£
e	Annual school or other educational fees (excluding extras and sundry disbursements)				
f	Compulsory additional school charges				
g	Amount of fees shown in (e)covered by: Scholarships, Bursaries or other allowances given by school				
	Annual sum arising from capital repayment scheme				
	Services/Diplomatic/Company Education Allowances (gross) (state whether sum has been included in gross salary at 3 (a)				
	Annual sum arising from Educational Insurance policies				
	Assistance from any other sources e.g. Grandparents, trusts, charities, etc. (please specify)				
h	Annual income of child (if any)				

i	Capital Value of Trust				

The details requested with regard to the fees payable and grants on behalf of your other children are for information only and will not normally be taken into account in the assessment of the level of grant awarded.

10. OTHER DEPENDENTS (See Note 7) (Please give details)

11. VERIFICATION OF INCOME

Please enclose documentary evidence in support of the income figures in Section 3.
Please tick those you are enclosing

a	P60 and P11D		Copy of HMRC tax calculation issued under Self-Assessment
b	Copy Pay Advice		Confirmation of schedule D self-employed income from an independent accountant
c	Report and Accounts (including Balance Sheet) for the years		
d	Others (please specify)		e.g. Copies of dividend vouchers, bank interest certificates

12. VERIFICATION OF ASSETS

Please enclose documentary evidence in support of capital assets
Please tick those you are enclosing

a	P60 and P11D		Copy of HMRC tax calculation issued under Self-Assessment	
b	Property Valuation	£	Investment Portfolio	£
			Valuation	
c	Mortgage Statement	£	Contents Insurance	£

13. HOME VISIT

The school may wish to visit you at your home address to discuss your application for support. Please indicate whether you are happy to receive a visit from the school's representative	**YES/NO** **Delete as appropriate**

ANY ADDITIONAL INFORMATION

14. DECLARATION

After having read the attached notes, the following declaration should be signed by both parents/applicants (or see below):

We/I have read the notes and have made a complete and accurate declaration of our/my income and assets.

We/I understand that if we/I are/am offered a Grant for our/my child and accept a place for him/her at the school, the following terms and conditions will apply as between ourselves/myself and the School:-

a) **our/my child's fees account with the School will be credited termly with the amount of the Grant for so long as the award remains in effect;**

b) **any award of a Grant is subject to annual review and we/I must complete an annual declaration of our/my financial circumstances on the form sent to us/me by the School and supply all relevant supporting evidence by the return date indicated;**

c) **we/I will report immediately any material change in the financial position declared;**

d) **the Grant may be withdrawn or reduced if:**

i. 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 the school;
ii. We/I have failed to return the annual declaration of our/my financial circumstances by the return date indicated;
iii. We/I have failed to produce any additional information required by the School to evidence our/my financial circumstances;
iv. In the opinion of the Headteacher, our/my child's attendance, progress or behaviour no longer merits the continuation of the award;

v. We/I are more than 28 days in arrears in respect of any amount due and owing to the school;
vi. There is a material change in our/my financial circumstances.
vii. The School's resources are insufficient to maintain the level of award.

e) **the Grant will be withdrawn and the value of any amount of the Grant previously credited against our/my child's fee account will become repayable to the school forthwith if we/I have fraudulently, knowingly or recklessly provided false information in relation to the award of the Grant.**

Signatures: (See Guidance Note 2)

Parent/Guardian*

……
….

Date ……..

Parent/Guardian*
……
….

Date …….....

4.

5. ANNEX B Bursary Application-Documentary Evidence Required

Your application for a bursary should be supported by the following documentation, where applicable, for both parents.

Section	Sub-section	Detail of Documents	Father Enclosed Y/N	Mother Enclosed Y/N

INCOME	ALL	Bank Statements for 3 consecutive months. If you operate subsidiary accounts, statements for these should also be submitted		
	Gross Salary	Payslips-Most recent and Month 12(March)		
		P60 End of Year Notice		
	Taxable Profits	Report and accounts, including balance sheet.		
		HMRC tax calculation issued under self-assessment		
		Confirmation of schedule D self-employment income from an independent accountant		
	Social Security benefits	Child allowance statement		
		Full working/child tax benefit		
		Statements of any other benefits		
OUTGOINGS	Mortgage	Mortgage statement		
	Other Interest	Other interest statements E.g.; credit cards		
	Landlord Rent	Rent payable agreements		
CAPITAL ASSETS	Market Value of Investments	Building society and other deposit account statements		
		Equity investment statements		
		ISA, PEP's etc. statements		

This list is not exhaustive, and you should certainly include any other document that you feel may support your application. It is, however, a guide as to what evidence we expect to see. If it is not submitted, we may well have to contact you for it, and this may hold up the process of assessing your financial circumstances.

PLEASE NOTE; WE REQUIRE ORIGINAL DOCUMENTATION. PHOTOCOPIES ARE NOT ACCEPTABLE

6. ANNEX C Guidance For Completion of Bursary Application Form

Before completing the form, please read these notes carefully, and contact the Office Manager if further information or advice is required. These notes refer to the corresponding paragraph on the Form.

The School reserves the right to see any other documentary evidence in support of the income and asset figures submitted, and to make enquiries which it deems necessary.

All financial values should be shown in Sterling. References to Her Majesty's Revenue and Customs (HMRC) include the relevant national Taxation Authority.

ASSISTANCE FROM OTHER SOURCES

In order to help the greatest number of parents who need financial assistance, all those who apply for a Bursary from the school are asked first to enquire if they are eligible for assistance from any other source.

Please state whether you have applied to trusts or foundations for a grant, and if so to which and with what result.

NOTE 1: PARENTS/APPLICANTS

These are defined as:

The natural father and mother of the child where they live together (whether or not they are married to each other) and the child normally resides with them both in the same household; or

The parent of the child with whom the child normally resides and the partner (if any) of that parent where the partner normally resides with that parent and the child in the same household; or

The child's guardian appointed in accordance with section 5 of the Children Act 1989 (or any earlier enactment) and the partner (if any) of that guardian where the partner normally resides with that guardian and the child in the same household; or

The person with whom the child resides in accordance with either:

A subsisting residence order made under section 8 of the Children Act 1989; or any subsisting court order (other than a residence order) which specifies who is to have actual custody or care and control of the child; or

Where a pupil either has no parents as defined above or the school is satisfied that no such parents can be found, and he is either looked after by a local authority or provided with accommodation within the meaning of section 105(1) of the Children Act 1989, the pupil shall be treated as one whose parents have no income for the purposes of the scheme; or

Where none of the above applies, the parent is the person with whom the pupil normally resides in accordance with any informal care or fostering arrangement and that person's partner (if any) where the partner normally resides with that person and the pupil in the same household.

If parents are separated or divorced before or while their child attends the School, both mother and father will require to complete and sign the Application Form

NOTE 2: INCOME

The gross annual amount of salaries and wages, including any earnings from profit related pay, part-time employment and any sum received as bonus, commission etc., statutory sick pay, statutory maternity pay giving GROSS amounts (before deduction of tax, NI, superannuation, etc.) for the current or latest financial year. Taxable benefits in kind agreed with HMRC should also be shown (free or subsidised housing, meals, petrol, cars, etc.) – at the amount agreed for taxable purposes.

Profits from a business or profession – at the amount of GROSS income agreed by HMRC or relevant tax authority for the year in question (deductions should be made only in respect of capital allowances). Copies of the latest set of accounts should be included.

All other Investment income (e.g. Interest or National Savings Bank deposits, dividends, annuities etc.) should be entered GROSS of tax. If tax was deducted at source, parents should add in the amount of tax paid or tax credit notified. Building Society interest must be disclosed GROSS.

All social security benefits received should be declared and the type of benefit specified.

Court Orders, Legal Separation Agreements and Voluntary Arrangements for School Fees – Where a parent is required by a Court Order, or a legal binding separation agreement (e.g. Deed of Separation) to pay part of the School fees, then only that part of the fee which is not covered by the Court Order/agreement will be used to calculate any grant to be awarded. This is irrespective of whether or not the order or agreement is being complied with. Where the whole amount of the fees are required to be paid by virtue of a Court Order or separation agreement, applicants are not eligible for a grant. You should indicate how many years are payable and any annual variations. All receipts relating to maintenance payments, separation allowances and sums in respect of Child Support maintenance must be declared.

Include free benefits in kind agreed by HMRC as not subject to tax, e.g. representative occupation of house, free meals.

Enter income from letting or subletting of property at the amount of the NET profit agreed with HMRC; and royalties and all other sources including entertainment and travel allowances etc.

NOTE 3: OUTGOINGS

Enter Income Tax and tax on unearned income SEPARATELY.

Enter annual superannuation contribution of (if applicable) payments to other Pension Schemes.

Enter capital as well as interest payment on a mortgage for the principal residence.

Only complete this if repayment is effected by means of a full Endowment Policy.

Include bank overdraft and other loan charges incurred during the year (specifying the purpose of the loan).

NOTE 4: PARENTS/APPLICANTS CAPITAL ASSETS

In addition to taking account of all relevant sources of income, the School takes account of the following assets:

The capital sum of any monies on deposit with any bank, deposit taker or building society. Investments in stocks and shares, valued as near as possible to the date of submitting the application form.

The current market value of your principal residence. The current market value should be estimated by parents where a current valuation is unavailable.

If you run your own business or are partners in a business, then you should show the net worth of the business. Shares in a company not listed on a stock exchange should be valued at the relevant proportion of the net value of the company.

In the case of second homes and/or other properties, these should also be included at their estimated current market value; no allowance will be made for any outstanding mortgage.

NOTE 5: PARENTS/APPLICANTS CAPITAL LIABILITIES

Details of other liabilities should be provided along with the lender.

NOTE 6: DEPENDENT CHILDREN

Use column number 1 for the child for whom you are now applying at his/her current school rate. Enter in other columns any other of your children who are unmarried and at a school, university or other educational institution which attracts a county grant.

The figures to be inserted here refer to the current academic year.

Members of HM Forces and Diplomatic Service should include the amount of any Educational Allowances which they receive. Parents in other occupations should include any similar sum.

Insurance Policies for School Fees – If any insurance policy for the payment of School fees exists, then the amount declared is the amount receivable under the policy for the academic year for which the application is being made. If the insurance policy covers the full cost of the tuition fees, then the pupil is not eligible for a bursary. The types of policy concerned are those which stipulate that the company shall pay the school fees, in whole or in part, to the school in respect of the pupil.

Where a Trust has been established in favour of the child for whom you are applying, details of the annual amount available and the date of commencement of payment from the Trust should be given.

Where the child has any unearned income e.g. Interest from National Savings, bank or building society deposits, or receives share dividends, you should enter the source of income and the gross amount received before deduction of any tax. Do not include any income from part time employment or student grants. You should enter the capital value of any beneficiary or other trust set up for each child.

NOTE 7: OTHER DEPENDENTS

If you qualify for a Carer's Allowance, or have an aged grandparent or relative living with you or dependent upon you, please provide details including age, address, condition etc.

ANY OTHER RELEVANT INFORMATION

Please enter here, or on a separate sheet if necessary, any details which may affect the assessment of a grant e.g. A significant change in income or outgoings for the coming year.

7. Amendments to the Policy

26/07/22	Staff changes	J.Onions
11/08/23	Updates	J.Onions
27/03/2024	Changes Local Advisory Board to Governors	T.Stooksbury
27/07/2024	Annual review	J Onions