

# **Bursary and Hardship Awards Policy**

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**St Helen's School**

September 2021

## 1. Introduction

St Helen's offers a limited number of bursary and hardship awards each year which are designed to enable pupils whose parents might not be able to afford the full fees to attend the school or who are experiencing short-term financial difficulties and need support. Both bursary and hardship awards are means-tested and subject to ongoing review.

## 2. Availability

### Bursary Awards

- 2.1 The Governors of St Helen's are keen to promote the attendance at the School by pupils whose parents might not be able to afford full fees. At the same time, the School does not benefit from a large bursary endowment and has limited resources from which it can offer bursaries. As a result, the number and size of bursaries offered can vary from year to year.
- 2.2 Bursaries may be awarded on entrance to St. Helen's at 11+ (Year 7) and 16+ (Year 12) **only**.
- 2.3 Those awarded a 100% bursary will receive additional support and benefits as outlined in the School's Bursary Programme – details of which are available from the School's Admissions Office on registration.
- 2.4 Bursary awards are reviewed on an annual basis to allow changing financial circumstances to be taken into account. Bursary awards may go up or down as a result of the review.

### Hardship Awards

- 2.5 Hardship awards are available to a current pupil at any stage during her time at the School in circumstances where her parents are experiencing short term financial difficulties and to assist in allowing the pupil to reach the next stage of her education.
- 2.6 Hardship awards are reviewed on a term-by-term basis and granted up to a maximum of one school year's fees per family during the course of the pupil's education. Families who remain unable to support the ongoing fees at the end of the hardship period will need to consider alternative arrangements for education and give the requisite full term's notice to the School in order to avoid payment of fees in lieu.

## 3. Criteria

- 3.1 Applications for either a bursary or hardship award are means assessed on their own merits and awards are made accordingly, within the limitations of the funding available.
- 3.2 The School aims to build up a comprehensive picture of family financial circumstances and due to the complex and varied nature of each assessment, St Helen's does not publish detailed criteria for the allocation of funding. However, as a starting point, the following information is assessed:

- Income and outgoings
- Assets, including property, savings and pension funds
- Liabilities, including mortgages and loans
- Fees paid and financial awards received for siblings at other private schools

3.3 It is recognised that judgements about what sacrifices a family should make to pay school fees will be personal to that family. However, as well as the information in 3.2 above, the School considers other factors including, but not limited to:

- The ability to improve the financial position or earning capacity 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 or the need to care for children under school age.
- The opportunities available to release equity, capital, savings or pension funds to finance school fees either in whole or in part.
- In cases of separation, any contribution made by the absent parent.

3.4 It is recognised that, in addition to financial constraints, there may be other circumstances which should be considered. These include:

- Where a parent/guardian is terminally ill or is unable to secure permanent employment due to poor health.
- Where a parental bereavement may result in the child having to be withdrawn from the school.

3.5 Acknowledging that others might have a different view, the School considers that the following are examples of circumstances that would not usually be consistent with the receipt of a bursary or hardship award:

- Total family annual income over £75,000
- Significant capital savings and investments
- Significant equity values in owned properties
- Frequent or expensive holidays
- Investment in major home improvements
- A second or multiple properties and/or land holdings
- New or luxury cars
- Siblings at other private schools

3.6 There is usually a greater demand for bursary and hardship awards than the School has the funding to provide. If this is the case, in respect of bursaries, reference is also made to the results of the entrance examination and the potential contribution of the pupil to the wider fabric of School life.

#### 4. Responsibilities

- 4.1 Any pupil who receives a bursary or hardship award is required to work hard, contribute positively to the life of the School, be a credit to the School and set a good example to other pupils.
- 4.2 Parents are expected to support and encourage the pupil and uphold the aims and the good name of the School. Parents are also required to pay the balance of the account by the first day of term.
- 4.3 The bursary or hardship award may be withdrawn by written notice sent to a parent if, in the opinion of the School, the pupil or a parent has not complied with the obligations mentioned above. Withdrawal of the bursary or hardship award shall take effect from the start of the following term.
- 4.4 All parents receiving a bursary or hardship award, regardless of its value, and who wish to remove their daughter are bound by the School's Terms and Conditions and must give a full term's notice in writing or become responsible for payment of the full term's fees. For the purposes of clarity, any fees in lieu that are payable will not be reduced by the value of the bursary.

#### 5. Application Process

- 5.1 To apply for either a bursary or hardship award, an applicant must complete a confidential Financial Assessment Form and send it to the School together with a covering letter explaining why the bursary or hardship is needed. This is intended to provide a clear picture of the family's position in order to allow the School to make a fair assessment of financial need. The Financial Assessment Form requires full details of a family's financial circumstances and supporting documentary evidence (e.g., copy bank statements, payslips, company accounts, mortgage and credit card statements etc.) will also need to be forwarded with the form.
- 5.2 The School may ask parents to attend an interview at the School or virtually or may visit the applicant's house to make sure the School fully understands the family's financial situation. Following this, an assessment is made and notified
- 5.3 The Financial Assessment Form is available to those who are registered with the School from the Admissions Department.
- 5.4 Potential new pupils seeking a bursary must return the Financial Assessment Form prior to the published registration deadline relevant to that age group. Only in exceptional circumstances will the school consider assessing a bursary application after that date.

- 5.5 Existing pupils whose families are experiencing short term financial difficulties should return the Financial Assessment Form 10 working days before the first day of the term for which the hardship award is requested.
- 5.6 Questions about the Financial Assessment Form or any aspect of the bursary or hardship application process can be addressed to, Amanda Jones, Head of Finance on 01923 843224 or at [bursaries@sthelens.london](mailto:bursaries@sthelens.london)

## 6. Confidentiality

- 6.1 The School respects the confidentiality of bursary and hardship awards made to families and recipients are expected to do likewise.
- 6.2 Bursary information is shared with staff with the proviso that the confidential nature of this information is respected at all times. All bursary recipients are encouraged to take a full part in the school's Bursary Support Programme. In order to be able to benefit from all elements of its comprehensive bursary provision including specialist mentoring and coaching if appropriate, the School advise that pupils are aware that they are in receipt of a bursary. However, the school appreciates that all parents reserve the right to opt out of those aspects of the bursary programme with which they are less comfortable.

## 7. Other sources of financial support

- 7.1 There are a number of educational charitable trusts who provide assistance with school fees. In the majority of cases, these are to assist children who are already attending a fee-paying school. The following link provides information on the support available:  
<https://educational-grants.org/about-etf/>

## 8. Review

- 8.1 This policy will be reviewed by the Business Director on an annual basis.

### Authorised by

<b>Date</b>	July 2021
<b>Effective date of the policy</b>	1 <sup>st</sup> September 2021
<b>Date of Next Review</b>	July 2022