



## **The Policy and Process for the Award of a means tested Bursary**

**Please read this policy together with Summer Fields' Admissions Policy**

### **Introduction**

Summer Fields is an independent boarding and day school for approximately 330 boys aged 4 to 13. All pupils in the Pre-prep school (Reception to Year 3) are day boys; the majority of pupils in the prep school (Year 4 to Year 8) are boarders, but with a substantial number of day boys too. Since the opening of the Pre-prep school in September 2018, Reception, Year 4 and Year 7 have been the main entry points to the school, although places in other years do become available. All enquiries regarding admissions and points of entry should be made to the Registrar.

### **Rationale**

The Headmaster and the Governors of Summer Fields are committed to ensuring that pupils who would benefit from an education at Summer Fields are not excluded from entering the school owing to their financial circumstances by offering means tested financial support with school fees to pupils who have met Summer Fields' minimum academic entrance criteria. This support is known as a bursary. Bursaries are awarded in the form of a discount ranging from 25% to 100% in cases of proven need, depending on the individual circumstances of the individual.

A bursary is distinct from a scholarship in that it is given to recognise financial need whereas scholarships are given to recognise outstanding achievement regardless of financial need. Bursaries are awarded to pupils who are likely to gain most from a Summer Fields education and who will contribute fully to the life of the School.

### **The Maclaren Foundation**

Summer Fields is fortunate to be able to fund bursaries with the help of its sister charity, The Maclaren Foundation founded in 2005 and before this as the Maclaren Trust founded in 1993. The Foundation represents the core values of the school: academic excellence, character development and social engagement and is overseen by an independent board of trustees appointed by the Summer Fields Board of Governors. The Foundation does not have sufficient funds to satisfy all the bursary applications received. Summer Fields has charitable status and therefore the Governors have an obligation to ensure that the limited pool of available funds is used prudently to support parents who otherwise would not be able to send their son to the school.

In this document the word 'parents' is taken to mean parent(s), carers or legal guardians.

### **Who is eligible to apply for a bursary?**

Parents of new pupils entering the school in Year 6 and Year 7 who are of limited financial means, can apply for a bursary award.

Summer Fields considers that the following would not be consistent with the receipt of a bursary award:

- Frequent and/or expensive holidays
- New or luxury cars
- Investment in significant home improvements
- A second property or landholding

## **How are applications for financial support assessed?**

Means testing is conducted in partnership with a third party. Parents are required to fill in a form, provide evidence of their financial circumstances and a representative from a third party will either visit you at home or meet with you online.

The means testing process considers the affordability of school fees based on each family's financial circumstances. Summer Fields recognises that judgements about what sacrifices a family should make to pay school fees will be personal. The assessment primarily considers family income, assets and liabilities.

However, the following factors will also be considered:

- 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 property and land holdings;
- In cases of separation, the contribution made by the absent parent (see the section on separated parents below);
- Contribution to household costs by other members of the wider family, by other adults unrelated to the child, or by outside sources;
- Where siblings are at other fee paying schools or places of education, it is expected that those organisations are also offering assistance with fees.
- The ability to improve the financial position or earning power of the family subject to the wider family context.

The school reserves the right to amend its assessment process at any time

## **How do I apply?**

In the first instance, please register your child with the Registrar and indicate that you would like to apply for a bursary. For further information, please visit the Admissions section of the school website.

## **Is a pupil's academic ability considered when making a bursary award?**

The bursary application process is separate to the academic admissions process. However, bursaries will only be offered to pupils who have met the academic criteria for admission to the school. Where demand for bursaries exceeds funds available, awards will be made on the basis of our assessment of an applicant's potential, including, but not limited to, their performance in the entry assessments. Each pupil to whom financial support is offered must in the opinion of the Headmaster, be likely to make sound academic progress following admission, possess the potential to develop the quality of their work, and benefit from a boarding school environment and participation in the wider, extra-curricular activities on offer at the school.

## **How are bursary applications from separated or divorced parents considered?**

In most circumstances, the financial circumstances of both parents of an applicant will be assessed. The school will be guided by any court orders or legal arrangements. Separated or divorced parents may complete a separate online form if they wish, and the information collected will not be shared with the other parents without explicit consent.

## **Are pupils on Bursaries eligible for support with extras?**

Pupils who are awarded a full (100%) bursary may also be offered support with extras such as educational trips, transport costs, music tuition, learning support. Parents of pupils on lower bursary awards are expected to pay for extras.

## **Does financial assistance with fees remain confidential?**

The school respects the confidentiality of bursary awards made to families. Likewise, parents are not expected to disclose to others the details of the bursary award they have been granted. A breach of confidentiality may result in the termination of the bursary award. Under the terms of the General Data Protection Regulation 2016/679 and the Data Protection Act 2018, the school is the Data Controller and information submitted in connection with an application for financial support will be processed lawfully and fairly in accordance with this legislation and the school's Privacy Notice.

## **How often are bursary awards reviewed?**

Bursary awards are subject to an annual review of a family's financial circumstances, with current information required for every year that a child applies for a bursary. Bursary awards may be varied up or down, depending on financial circumstances.

## **Can a bursary award be removed at any time?**

A bursary award may be withdrawn in its entirety in accordance with the terms and conditions upon which an award is made, or otherwise in accordance with the School's Terms & Conditions. A bursary may also be withdrawn in its entirety if, in the opinion of the Headmaster, the child's attendance, progress and/or behaviour (and/or the parents' behaviour or conduct) no longer merit the continuation of the award.

## **ANNEX A**

### **FAQs**

#### **What is a bursary?**

A bursary is a reduction in the fees charged by the school to parents for a child's education. The reduction can range from 25% up to 100%.

A bursary reduces the amount the pupil's parents, legal guardians or fee payers ('Parents') pay for the pupil's education at Summer Fields.

#### **Who is eligible for a bursary?**

Bursaries are available for boys joining Summer Fields most typically in Year 6 and Year 7. All applicants must meet the minimum academic standard of entry and there must be a genuine financial need for assistance with fees.

All bursaries are 'means-tested'. The amount of help with fees depends on each family's circumstances. Family assets, income, liabilities and lifestyle will all be taken into consideration.

Where demand exceeds funds available for bursaries, awards will be made on the basis of the applicant's potential and performance in the entry assessments.

In addition, each pupil to whom support is offered must, in the opinion of the Headmaster, be likely to make sound academic progress following admission and possess the potential to develop the quality of their work, and benefit from participation in the wider, extra-curricular activities on offer at Summer Fields.

#### **How do I apply?**

In the first instance, please register your child with our Registrar, Mrs Christine Berry and indicate that you would like to apply for a bursary. Email: [admissions@summerfields.com](mailto:admissions@summerfields.com) Tel: 01865 459204 / 07483 357895.

Applications should be submitted by the end of October of the year prior to entry. Means-testing is conducted in partnership with a third party. Parents are required to provide evidence of their financial circumstances.

#### **Who decides on the level of bursary awards given?**

The Maclaren Foundation awards are assessed by the Board of Trustees with advice from the Headmaster and the Finance Director. Further bursaries may sometimes be made available at the discretion of the Headmaster.

#### **How is the level of bursary award decided?**

Bursary awards are made following a financial evaluation based on a combination of family income and the value of assets and liabilities. A range of other criteria will also be reviewed including ownership of second properties, number of dependents, additional income potential for those parents not in full-time employment, lifestyle and holidays, the potential for additional support from family members, pension contributions, and the ability to release capital where assets and property exist. The school does not disclose specific financial thresholds or detailed criteria used in the financial evaluation.

### Is there a deadline for bursary applications?

Applications should be submitted no later than the end of October of the year prior to entry.

### How does a bursary differ from a scholarship?

Bursaries are 'means-tested' which means they take into account a financial need, whereas scholarships recognise achievement regardless of financial need.

### Who will know my child has been awarded a bursary?

Bursaries are always treated confidentially. Only those responsible for awarding your child's bursary will know your child has been awarded a bursary.

### What must I do if my financial circumstances change?

If you are already in receipt of a bursary then you must advise the School of any important changes in your financial circumstances as soon as possible.

### How often are bursary awards re-assessed?

Bursary awards are reviewed annually when in the Lent term the school sends parents a request to update their financial information. Existing bursary holders can expect requests for updates on their financial situation from time to time. The updated information is then reviewed by the school and awards can either be increased or decreased according to changes in circumstances. Continuing bursary support is subject to a pupil making good academic progress, demonstrating satisfactory behaviour, and contributing positively to school life.

