



MERCHISTON

MEANS -TESTED BURSARIES

General

The Governors of Merchiston Castle School are committed to broadening access to the school by offering to eligible parents/guardians means-tested financial support with the payment of schools fees. Such support is known as a Bursary and these may be awarded in the form of a discount of up to 100% on tuition fees payable, depending on the financial, compassionate or other pertinent circumstances of applicants.

Bursary awards are subject to repeat testing of parental means and may be varied upwards or downwards, depending on parental circumstances. Awards are made on the basis of the Merchiston Castle 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 Bursar to reflect any changes in fee costs, and approved by the Governors. 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 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parents/guardians' circumstances has resulted in difficulty in meeting tuition fees and may result in the child being withdrawn part way through a stage of education.

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 School website.
- The local press by means of advertisements.

The Application Process

Bursaries may be made available to parents/guardians of children entering any year-group at Merchiston Castle School. They are awarded at the discretion of the Governors and the Head and Bursar are 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, may be found at Annex A and must be accompanied by full documentary evidence. The completed forms, together with the necessary documentary evidence, are to be submitted to the Bursar no later than the **31st January** in any year for bursaries to start the following September.
- **Step Two:** The Bursar 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 the Bursar, or his representative, 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 Bursar prepares a recommendation in accordance with the Merchiston Castle School 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 School Governors for approval.

- **Step Five: End of February.** The parents/guardians are advised whether their child is to be offered a place at the School and of the Bursary offer.
- **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.

The Case for Assistance

The Head and Bursar 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 work, and benefit from participation in the wider, co-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 focussed 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 bursary:

- Frequent or expensive holidays
- New or luxury cars
- 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 (eg: 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.

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 Bursar explaining their situation and using the forms at **Annex A**. Such awards are subject to the availability of funding and cannot be guaranteed.

Annual Review

All bursary awards are subject to repeat testing of parental means and may be varied upwards or downwards depending on parental circumstances. Current bursary holders will be issued with repeat means-testing forms at the beginning of **May** each year for return by the end of the month. For those previously in receipt of bursaries, the Head and Bursar, in making their joint recommendation to the School Governors, 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.

Confidentiality

The School respects the confidentiality of bursary awards made to families and recipients are expected to do likewise.

Other Sources of Bursary Assistance

In addition to the School's Bursary Fund, 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 and due to a change of circumstances may be unable to remain. Merchiston Castle School encourages parents/guardians to apply for support where it is felt a good case can be made for assistance. Further information on how to pursue such assistance may be obtained from:

The Bursar

Merchiston Castle School

Or

The Educational Trusts Forum/The Joint Educational Trust

6 Lovat Lane

London EC3R 8DT

Email: admin@jetcharity.org

Website: www.jetcharity.org