

## **BGS Bursary Policy**

### **INTRODUCTION**

BGS is a registered charity subject to obligations contained within the Charities Act 2006. The school seeks to adhere to the principles of public benefit identified by the Charity Commission. This policy is reviewed annually to ensure compliance with the latest guidance issued.

### **AIMS**

1. To widen access to the school ensuring that the benefit of an education at BGS is available to children from as broad a spectrum of the community as is possible.
2. To provide support to those families already within the school community that may require hardship/emergency funding on a short term basis or whose circumstances fundamentally alter.
3. To meet and if possible exceed public benefit requirements as laid down by the Charity Commission.

### **ELIGIBILITY/PROCEDURE**

1. The governors welcome applications for financial assistance from parents/guardians of prospective pupils and from those with children already at the school where financial need can be demonstrated.
2. It would be usual for applications to be considered during the spring term but applications at other times of the year may be considered should the need arise.
3. The parents/guardians of the child must complete a means test application form (see Annex A) which is available from the School Business Manager. This should be submitted together with a covering letter setting out the basis on which the bursary is sought. If successful this will be retained for the duration of the Bursary.
4. All applications will be considered by the Bursary Committee comprising the Headteacher, School Business Manager and representatives of the governing body. It is possible that an interview or home visit may be required to ascertain certain facts. The decision of the committee is final and will be communicated to the applicants in writing.
5. All bursary applications will be treated in the strictest confidence and pupils will not be made aware that they are in receipt of a bursary unless informed by their parents/guardians.
6. All bursary awards are reviewed annually and may be increased or decreased according to need. This review would normally take place before the end of the spring term.

### **FINANCIAL CONSIDERATIONS**

The amount of the bursary award is not determined in any way by the academic ability of the child but by financial need alone. Each case is assessed on its own merits and awards made accordingly having regard to the amount of bursary funding available within the school budget at that time.

A range of factors are taken into account in considering the making of an award and there are no hard and fast rules. However, the following will always be considered pertinent:

1. The current income and outgoings of the family. It is unlikely that applications where the family income exceeds £42,000 (01/2019) will be successful.
2. The ability of the family to release capital. It is unlikely that a request would be successful where the family has significant capital savings and investments or significant equity within the family home.
3. In cases of separation, the contribution made by the absent parent.
4. The "lifestyle choices" made by the family. For example the bursary committee would generally consider frequent or expensive holidays, new or luxury cars, investment in major home improvements or second properties to be incompatible with a request for bursary assistance.

In all cases the bursary committee reserves the right to request an interview or home visit to establish the financial circumstances of the family applying for a bursary. The decision of the committee is final but if the application is declined there is no bar to the family reapplying if their circumstances change.

## **Bursary Scheme**

### Conditions of Award

**1. Obligations of the pupil:** A pupil who is the subject of an Award is required to work hard, to contribute positively to the life of the School, to be a credit to the School and to set a good example to other pupils. These are the Purposes of the Award.

**2. Obligations of the Parent/s:** The parents are expected to support and encourage their child to achieve the purposes of the Award and to uphold the aims and the good name of the School. The parents are also required to pay the balance of the account by the first day of term.

**3. Withdrawal of the Award:** The Award may be withdrawn by written notice sent to a parent if, in the opinion of the Governors acting in good faith, the pupil or a parent has not complied with the obligations set out in paragraphs 1 and 2 above or otherwise the pupil has fallen below the required standards of conduct and progress and in the further opinion of the Governors there has been no significant improvement following consultation with a parent and/or the pupil and a written warning. Withdrawal of the award shall take effect from the start of the following term.

Further, the Award may be withdrawn by written notice if:

- the balance of the account remains unpaid 28 days after a written reminder has been sent to the parents:
- the parents fail to disclose accurate information about their financial position.

**4. Repayment events:** Parents shall be required forthwith upon written notice to repay all or part of the benefits they have received under the Award in any of the following circumstances at the discretion of the Governing Body:

- a) up to three terms' benefits (if received) if the pupil has engaged in serious misconduct or has been expelled or removed for reasons of misconduct by the requirement of the Head acting in good faith;
- b) up to three terms' benefits (if received) in a case of the pupil being withdrawn for any reason during a School term without a term's written notice having been given;

**5. Fees in lieu of notice:** For the avoidance of doubt, the benefits receivable under an Award do not apply to any term for which the School has required payment of fees in lieu of notice.

**6. Terms and Conditions:** These Conditions of Award take precedence over any of the School's terms and conditions which are inconsistent with them but in all other respects the terms and conditions as amended from time to time shall apply and these Conditions of Award shall be interpreted in accordance with them.



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## Confidential Statement of Financial Circumstances

[This questionnaire is in the form recommended by the Independent Schools' Bursars Association]

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

2. PARENT CONTACT DETAILS			
		Father/Step Father	Mother/Step Mother
a	Names		
b	Title		
c	Address		
d	Post Code		
e	Day time Tel		
f	Evening Tel		
g	Mobile		
h	Fax		
i	E Mail Address		

3. PARENTS' OCCUPATIONS			
a	Employed ( complete employer's address and phone number)		
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		
<b>4. INCOME</b>			
<i>(Please enter below your current earnings and expected income from all sources for this tax year)</i>			
		<b>Father/Step Father</b>	<b>Mother/Step Mother</b>
a	Gross Salary and other emoluments (including all taxable benefits & 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:		
	<ul style="list-style-type: none"> <li>• Building Societies /Banks</li> <li>• Dividends and interest (other securities)</li> </ul>		
e	Gross rental profit		
f	Social Security benefits (including Child Benefit and 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 eg: 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.		

<b>5. OUTGOINGS</b>			
a	Tax payable on Incomes declared above <i>(including tax deducted at source)</i>		
b	National Insurance Contributions		
c	Pension or superannuation contributions (net)		

d	Mortgage repayments (include 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			
		Father/Step Father	Mother/Step Mother
a	Approximate market value of all investments		
	<ul style="list-style-type: none"> <li>• Building Society/Bank deposits/National Savings accounts</li> <li>• Equity investments, (shares, unit trusts, corporate bonds and other securities) and Government stocks</li> <li>• PEPs, ISAs, TESSAs , TOISAs</li> <li>• Life assurance bonds and policies including endowments</li> </ul>		
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		
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7. CAPITAL LIABILITIES			
		Father/Step Father	Mother/Step Mother
<i>(Please give details of any capital charges against the assets declared in Section 6)</i>			
a	Mortgage Details		
	<ul style="list-style-type: none"> <li>amount outstanding on principal residence</li> <li>a final payment date</li> </ul>		
b	Other liabilities <i>(please specify)</i>		

8. NET ASSETS			
	TOTAL ASSETS (6)		
	LIABILITIES (7)		
	NET ASSETS (6-7)		
<i>Please explain any reasons why net assets cannot be converted or utilised to pay school fees.</i>			

9. DEPENDENT CHILDREN					
<i>(Include the child to whom this application refers: if more than 4 children, give details on a separate sheet)</i>					
		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 <i>(excluding extras and sundry disbursements)</i>				
f	Compulsory additional school charges				
g	Amount of fees shown in (e) covered by:				
	<ul style="list-style-type: none"> <li>Scholarships, Bursaries or other allowances given by school</li> <li>Annual sum arising from capital repayment scheme</li> <li>Services/Diplomatic/Company Education Allowances (gross) <i>(state whether sum has been included in gross salary at 3 (a))</i></li> </ul>				

	<ul style="list-style-type: none"> <li>Annual sum arising from Educational Insurance Policies</li> </ul>				
	<ul style="list-style-type: none"> <li>Assistance from any other sources eg Grandparents, trusts, charities, etc (<i>please specify</i>)</li> </ul>				
h	<ul style="list-style-type: none"> <li>Annual income of child (<i>if any</i>)</li> </ul>				
	<ul style="list-style-type: none"> <li>Capital Value of Trust</li> </ul>				

#### 10. OTHER DEPENDENTS

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#### 11. VERIFICATION OF INCOME

Please enclose documentary evidence in support of the income figures in Section 3.

Please tick those you are enclosing:

	P60 and P11D		Copy of HMRC tax calculation issued under Self Assessment	
	Pay Advice		Confirmation of Schedule D self employment income from an independent accountant	
	Report & Accounts (including Balance Sheet) for the years			
	Others ( <i>please specify</i> )		e.g. copies of dividend vouchers, bank interest certificates	

#### 12. VERIFICATION OF ASSETS Please enclose documentary evidence of capital assets and tick those you are enclosing:

	Property Valuation	£	Investment Portfolio Valuation	£
	Mortgage Statement	£	Contents Insurance	£

**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.

Signatures: (See Guidance Note 2)

Parent/Guardian\* .....Date .....

Parent/Guardian\* .....Date .....



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