LOCHINVER HOUSE

Bursary Policy

The Governors of Lochinver House 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 these may be awarded, at the absolute discretion of the Governors, in the form of a discount of up to 100% on tuition fees payable.

Bursaries are subject to annual review and changes in financial circumstances may result in appropriate adjustment in the level of bursary offered the following year. Awards are made on a discretionary basis and the School cannot guarantee an increase in funding if the family circumstances change. The scale of any award is approved by the Head and Bursary Committee subject to the overall budget agreed by the Finance and General Purposes Committee.

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 (please refer to the School's Admissions and Attendance Policy)
- 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parents/guardians' circumstances has resulted in difficulty in meeting tuition fees and may result in the child being withdrawn part way through a stage of education.

Information about possible support through a Lochinver bursary is included in the School website, Open Morning advertising and PR campaigns.

Application Process

1. If the parents/guardians meet any of the following criteria they are unlikely to be considered for a bursary unless there are exceptional circumstances surrounding their application.:
   - A gross family income in excess of £102,500 when the family (or a parent/ guardian) has one child attending an independent school or expecting to attend an independent school.
   - A gross family income in excess of £123,000 when the family (or a parent/ guardian) has two children attending an independent school or expecting to attend an independent school.
   - If the parents/guardians main property (less the mortgage) is worth more than £615,000.

   The School cannot guarantee that every application for support will be successful; eligibility does not guarantee a bursary will be awarded. 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 its overall budget.
2. Applications for a bursary are accepted from any family whose child has been offered a place at the School or is currently a pupil at the School. An application for a new bursary must be made in writing to the Bursar as soon as possible after an offer has been made. Bursaries are allocated in March with the exception of hardship cases where there has been a change in a family's financial circumstances which may occur at any time of the year. Where the application is for a new pupil, the School will hold the requirement to accept the place until the outcome of the bursary application is known.

3. The School uses a 3rd party to assess the applications in order to establish the likely level of support which will be required in order to allow the pupil to attend the School. This assessment may involve the assessor visiting the parents'/guardians' home to ensure the information has been correctly interpreted and the basis of the financial assessment has been fair.
4. All applications will be assessed by the Head and Bursary Committee in line with the agreed budgeted funds by the F&GP Committee. The Head and Bursary Committee will have full discretion in allocating the Bursary funds. The decision of the Head and Bursary Committee is final and not subject to review.
5. The parents/guardians are notified after the meeting whether their bursary application has been successful and if so the level of the bursary.
6. For a new pupil the parents/guardians are required to sign a letter accepting the place at the School and an acknowledgement agreeing to any conditions relating to the bursary. For an existing pupil, the parents/ guardians are required to sign a letter acknowledging and agreeing to any conditions relating to the bursary.

The Case for Assistance

The **Head and Bursary Committee** will consider several factors when exercising their judgement whether grounds for support exist and, if so, the extent to which support should be offered. Usually, the suitability of the child 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 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 benefit most from the educational provision. 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 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 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 bursaries are well focussed and so, as well as current earnings, other factors which will be considered in determining the necessary/appropriate level of grant will include:
  - 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.
  - 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 both parents.
  - Contribution to household costs by other, wider, family members, any adults unrelated to the child or by outside sources.
  - Other educational outgoings, in particular fees paid to other schools or universities.
  - 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
    - A lifestyle that reveals a high level of discretionary spending on eating out, clothes, entertainment etc
    - New or luxury cars
    - Investment in significant home improvements
    - Additional property/land holdings
    - Attendance on overseas non-educational school trips.

- 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:
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  - Where the social needs of the child are relevant.
  - Where a parent/guardian is unable to secure permanent employment due to poor health or terminal illness.

- Where a separation has resulted in the child having to be withdrawn from the School, thus adding to the stress of coping with the parents/guardians separating.

Existing Pupils - Change in Family Circumstances
The School will, in normal circumstances, consider hardship applications 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. Such awards are subject to the availability of funding and cannot be guaranteed.

Bursary Review
All bursaries are subject to repeat testing of parental means each year, which may result in appropriate adjustment in the level of bursary depending on parental circumstances. Current bursary holders will be issued with repeat means-testing forms at the beginning of December each year for return by a specific date as directed by the Bursar**. Applications received after this date will not be considered for a bursary unless there are exceptional circumstances**. In addition, the Bursary Committee require that applicants cooperate fully by providing comprehensive and accurate information for the assessment and planning promptly for a home visit by a third-party company if required.

For those previously in receipt of bursaries, the Head, in their review with the Bursary Committee have the discretion to recommend the reduction or withdrawal of an award where a pupil's progress, attitude or behaviour has been unsatisfactory and where the parents/guardians have failed to support the School, for example by the late payment of school fees. Any withdrawal of an award under such circumstances will take place with effect from the start of the following term.

The School may require parents/guardians in receipt of a bursary to submit additional mid-year information when more up to date financial information/details becomes available, such as P60's issued by employers post April year end.

Confidentiality
The School respects the confidentiality of bursary applications and awards made to families and recipients are expected to do likewise. The obligation to make full disclosure of any change in circumstances pertinent to eligibility for the existing award is binding upon signing the award acceptance letter. If the School becomes aware or is made aware that the information provided is not accurate the bursary may be amended or terminated the following term. In all circumstances parents/guardians are bound by our terms and conditions, including the requirement to give a full term's notice if a child is to be withdrawn from the School.

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 most 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. Lochinver House School encourages parents/guardians to apply for support from these trusts where it is felt a good case can be made for assistance.

Final Remark
Bursaries are awarded without any obligation to repay them however we would be most grateful if parents whose circumstances subsequently improve, consider a donation to the school to help other families in difficult financial circumstances.

Policy Reviewed:	1.04.2026
Policy Review Date:	30.03.2027
Policy linked to:	Admissions and Attendance Policy, Children Missing from Education Policy, Data Protection Policy, Privacy Notice.

Any data held in relation to the content of this policy will be managed in accordance with our Data Protection Policy and Privacy Notice.