SHERBORNE
SCHOOLS GROUP

Bursary Award Policy

Approving body: Finance Committee
Owner: Chief Operating Officer (COO)
Author: Operations Bursar (SG)

Executive Summary

This document is for staff, current parents, and prospective parents. It sets out the Sherborne Schools Group's policy on the allocation of means-tested financial support (bursary awards) for applicants new to the Schools as well as current pupils. Processes and guiding principles behind application and assessment, as well as annual review, are outlined.

Date of Review: Michaelmas 2026
Date of Approval: 23 October 2026[1]

Issue Number: 2.1
Review Due: Trinity 2027

[1] Approved by the COO pending ratification by the Finance Committee.

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Introduction

In line with the objectives of the Charity, the governors of the Sherborne Schools Group (the Group) are committed to offering to eligible parents / guardians means-tested financial assistance with the payment of school fees to enable a pupil to attend Sherborne Boys, Sherborne Girls, Sherborne Prep, or Hanford Prep (the Schools) who otherwise would not be able to do so. Such support is known as a bursary award (or bursary).

A bursary may be considered where, having taken into account the family's full financial position – including all income, wider family support, pensions, investments and savings, a reasonable expectation that both parents or guardians are working to the extent possible, and any realistic ability to release equity from property – it is clear that the funds available are insufficient to meet the School's fees. In assessing this, only essential expenditure will be considered (which does not include, for example, significant holiday costs). Families in these circumstances are encouraged to apply, with full and transparent financial disclosure.

The Group engages the services of Bursary Assessment Associates (BAA) to collate the financial circumstances of bursary applicants on behalf of the Group, for onward consideration by the Chief Operating Officer (COO). Awards are subject to annual review, including repeat testing of financial circumstances, and may be varied upwards or downwards.

Bursaries are also available to scholars and other award holders and for existing pupils where a change in parents / guardians' circumstances has resulted in difficulty in meeting termly fees and may result in the pupil being withdrawn part way through a stage of education. It is unlikely that funding in such circumstances will be available for pupils in the lower years or for those moving into the Sixth Form as priority is given to pupils who are studying for public examinations.

The Group's funding available for bursary awards is finite. Therefore, it is not always possible to award assistance to all families of pupils that are offered places at the Schools where their financial circumstances might justify it, nor can funding be guaranteed for assisting current parents where their financial circumstances suddenly and unexpectedly change.

There are a number of educational and charitable trusts which provide assistance with school 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. The Group 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 Educational Trusts' Forum (www.educational-grants.org).

Application and Assessment

The School websites set out the timescale and process for applications and the award of scholarships and bursaries for pupils wishing to enter the Schools. Applications for bursaries for new pupils will not be considered before the application date specified on the website. Late applications will only be considered in exceptional circumstances and if funds remain available.

Parents / guardians will be required to complete the online form provided by BAA and will be required to sign a declaration that the information they have provided is both accurate and complete. If any information provided in a bursary application, or as part of the broader assessment process, is subsequently discovered to be false, misleading, or incomplete, the Group may withdraw any award which has been made with immediate effect and, depending on the circumstances may require reimbursement. In certain circumstances, the relevant School may also terminate its contract with the parents and require the removal of the child from the School.

Failure to supply the required information to BAA adequately and or omission of appropriate documentation may cause delays in or invalidate the assessment of an application.

The Group expects anyone with legal parental responsibility to complete the form even where they are separated, divorced, estranged, or the absent parent does not contribute to the financial upkeep of the pupil for whom the application is made. Parents are expected to co-operate fully with the assessment process undertaken by BAA. It is extremely important that all bursary applicants provide full and accurate disclosure of their and their household's financial circumstances. If the parents are divorced or live separately, they will each be required to complete a separate application and provide full financial disclosure, including information about other partners/dependents. The Group will then consider the financial circumstances of each parent's household and assess the overall situation.

The Group will not accept a bursary application by one parent only (e.g. where the other parent is refusing to participate in the process) unless there is a Court Order in place which has removed the responsibility of one parent. It is recognised, however, that these cases may be complicated and therefore parents are encouraged to discuss any relevant circumstances with the COO before proceeding with an application.

It is recognised that judgements about what sacrifices a family should make to pay school fees will be personal. However, the Schools have a duty to ensure that all bursaries are justified and so, as well as current earnings, other factors which will be considered in determining the necessary level of assistance 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;
- The size and value of the family home and its location relevant to the parents' work or other relevant circumstances;
- ISAs, investment portfolios and other realisable savings that might be accessed towards the payment of fees;
- Opportunities to release any capital. Significant capital savings and investments would be expected to be used for the payment of school fees, as would surplus equity values in the family home and other property;
- 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;
- Payment of fees to other schools (or further education/university), the value of any fee remissions such as bursaries or scholarships;
- The pupil's and other dependents' income including income from trusts;
- Lifestyle of family. 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;
    - Expensive or luxury cars, antiques, works of art, jewellery, boats etc.;
    - Investment in significant home improvements;
    - Devoting resources to expensive or luxury hobbies or past times;
    - A second property / land holdings other than for the parents' business interests which are held solely to provide the family's income.

BAA will contact the parents to make arrangements for a meeting in person or remotely to ensure that any financial review is as correct as it can possibly be.

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

- Where a pupil has siblings at the Schools;
- Where the social and/ or educational needs of the pupil are relevant;
- Where a parent / guardian is terminally ill or is unable to secure permanent employment due to poor health.

Parents/guardians who are alumni of Sherborne Boys or Sherborne Girls or whose children are the close relatives of alumni are asked to indicate as such as part of the bursary application process.

Parents of **current pupils** whose financial circumstances suddenly and unexpectedly change should contact the Finance Department as soon as possible by emailing billing@sherborneschools.group or telephoning 01935 818347.

Cost

To contribute towards the administrative and third-party costs associated with processing bursary applications, a non-refundable charge of £150 (inc. VAT) will be applied.

By submitting a bursary application, prospective parents/guardians confirm their agreement to this arrangement. This contribution supports the costs of administering the bursary scheme, helping to ensure that available funds can be distributed as effectively as possible to families in need.

Where an offer of a place is accepted and the pupil subsequently attends the School, this amount will be deducted from the value of the acceptance deposit, which is credited towards the final payment of extras or other fees owing when the pupil leaves the School.

Where a prospective pupil does not take up a place at the School after having applied for bursarial support, and the level of support deemed by the School to be required cannot be provided, the School will refund the deposit less the charge of £150.

Award Decisions

BAA will compile a report based on their assessment of the application. This report is sent securely to the COO, and BAA will then withdraw from the process unless the COO has any

further enquiries it wishes BAA to make. Each case is considered on its own merits, and the decision of the Group is final.

In general, the maximum bursary awards offered will be 70% of the standard boarding or day boarding fees at the senior schools (with any associated overnight charges not remitted), 50% of the standard day fees at the prep and senior schools, and 60% of the standard boarding fees at the prep schools. The exception to the above is any full bursaries under schemes such as the Royal National Children's SpringBoard Foundation (RNCSF) or internal equivalents.

No awards will be made before Year 3, and any other available remissions (sibling discount, scholarship awards, etc.) will be subsumed within the overall means-tested value. Compulsory extras will not be remitted.

Parents / guardians will be notified of the decision in writing. Where an award is made, it will usually be made for a full academic year but on occasions awards may be for one or two terms only.

The Group is unlikely to award a bursary where parents have failed to honour school fee payments to another school.

The Group will not normally award a bursary where the child in respect of whom the application is made has a sibling who has a full fee-paying place at another independent school.

Annual Review

All bursary awards are subject to repeat testing of parental means each year and may be varied upwards or downwards depending on the circumstances. Recipients will be required to complete the necessary forms to reflect their financial circumstances, when requested, and provide any further information requested. This process may be untaken by BAA or internally, depending on the pupil's stage of education. This process is usually carried out early in the Lent term for the following academic year. Parents/guardians will be notified, normally by the end of the Lent term, of the outcome of their reviewed application.

Should a family's circumstances significantly improve during the academic year, parents / guardians should contact bursaries@sherborneschools.group immediately.

Terms & Conditions

Each individual with parental responsibility for a pupil in receipt of a bursary is required to agree to certain terms and conditions which are outlined in the Bursary Award Terms & Conditions (Appendix 2). This document is issued upon the original offer of an award and annually, as awards are assessed for continuation. Failure to sign and return this document or to abide by the accepted terms and conditions may result in the bursary being withdrawn.

Any pupil in receipt of a bursary will be expected to abide by all the relevant School's policies and to meet its academic expectations. Heads have the discretion to reduce or withdraw 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 school fees.

Data Protection and Confidentiality

Parents applying for a bursary submit information about their families for consideration by BAA and the School(s). For data protection law purposes, the Group is the data controller and BAA is a data processor in relation to the information submitted.

BAA is registered with the Information Commissioner's Office (ICO) and has satisfied the Group as to its arrangements regarding the security of any information and documents an applicant may provide.

In making a bursary application and completing the bursary application form, parents / guardians will be taken to have consented to the processing of financial and personal data relating to the applicant, personal data relating to their child(ren), and sensitive personal data relating to the applicants and the child(ren), both by BAA and by the relevant School(s). Relevant information may also be obtained from third parties in order to assess the award.

It should be noted that the report produced by BAA is the property of the Group and the ICO regards the report as confidential and exempt from the provisions in the data protection legislation in relation to Subject Access Requests.

BAA will retain application forms for seven years and supporting documentation for two years, after which they will be destroyed.

Similarly, when awards are assessed internally using the Group's means-tested form, the relevant School will retain application forms for seven years and supporting documentation for two years, after which they will be destroyed.

The Group respects the confidentiality of bursary awards made to families and recipients are expected to do likewise. All letters confirming any awards will refer to the requirement for confidentiality.

Appendix 1: Summary of Changes in Issue 2

- Addition of detail regarding maximum value of awards offered and associated conditions of awards.
- Addition of detail regarding the cost of the bursary award assessment process.
- Clarification on process of alumni of Sherborne Boys or Sherborne Girls to indicate this as part of the application process.

Changes in Issue 2.1

- Contact details updated under 'Annual Review'.

Appendix 2: Bursary Award Terms & Conditions

We/I enter into this agreement on the understanding that, with the level of Bursary Award (Bursary) on offer, we are in a position to fund the fees at our/my child's school(s) within the Sherborne Schools Group.

The financial value of the Bursary is a charitable gift. As such we/I will act as ambassadors of the charity which has awarded the gift (i.e., the Sherborne Schools Group).

Specifically, we/I will support and encourage our/my child/children to achieve the purposes of the Bursary and uphold the aims and the good name of their school both outside the school and amongst the parent body.

We/I understand that the Bursary from the Sherborne Schools Group is subject to the following terms and conditions as between ourselves/myself and our/my child's school(s):

1. Our/my child's/children's fees account(s) with the school will be credited termly with the amount of the Bursary for so long as the remission remains in effect;

2. The Bursary is subject to annual review and, if required, we/I must complete a declaration of our/my financial circumstances, supplying all requested relevant supporting evidence by the return date indicated;

3. We/I will immediately report any material change in the financial position declared;

4. The Bursary may be withdrawn or reduced if:
    a. We/I act or our/my child/children act(s) in breach of the accepted Terms and Conditions/Parent Contract;
    b. Our/my child/children act(s) in breach of the school's Pupil Code of Conduct;
    c. We/I have failed to return the requested declaration of our/my financial circumstances by the return date indicated;
    d. We/I have failed to produce any additional information required to evidence our/my financial circumstances;
    e. In the opinion of the Head of our/my child's/children's school, our/my child's/children's attendance, progress or behaviour no longer merits the continuation of the Bursary;
    f. We/I are more than 28 days in arrears in respect of any amount due and owing to the school;
    g. There is a material change in our/my financial circumstances;
    h. The Sherborne Schools Group's resources are insufficient to maintain the level of award.

5. The Bursary will be withdrawn and the value of any amount of the Bursary previously credited against our/my child's/children's fees account(s) will become repayable to the school forthwith if we/I have fraudulently, knowingly or recklessly provided false information in relation to the award of the Bursary.