



## Brentwood School

### Means-Tested Bursaries Policy

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## **MEANS-TESTED BURSARIES POLICY**

### Our Commitment to Widening Access

Each year, Brentwood School sets aside financial support designed to broaden access to the School by enabling children to come to the School who could not otherwise do so and allowing pupils to remain in the event of an unforeseen change in family circumstances.

Through our means-tested bursary scheme, we are able to offer the opportunity of a Brentwood School education to 130 day pupils. This means that 1 in 10 Senior School pupils receive some element of means-tested fee assistance. In 2024/25, we spent nearly £2.6m on bursaries, with 100 children receiving a discount of at least 70% of tuition fees and 57 children paying no fees at all for their education at Brentwood. Means-tested bursaries are not available for children in the Preparatory School.

This means-tested support is known as a '**bursary**' and may be awarded in the form of a discount of up to 100% on tuition fees. Support is also provided towards the cost of uniform, home-school coach travel and educational trips through the [Additional Support](#) scheme. All this brings a Brentwood School education within reach of the most disadvantaged families. Bursary funding has transformed the lives of children with the potential to achieve well academically in a supportive environment.

The reach of our bursaries is growing, but parents should be aware that the School does not have sufficient funds to satisfy all requests. Currently around one in five applications for bursary funding is successful. We try to ensure that all applicants are treated fairly and reasonably by prioritising candidates according to the criteria set out in the Admissions Policy. For those applicants who achieve exceptionally well against the admissions criteria, we use an independent specialist, Bursary Administration Ltd (BAL), to review finances on our behalf. We also provide support through Hardship Awards to current pupils where family incomes may have been unexpectedly and severely affected by the death of a parent or serious or terminal illness. Again, we try to ensure fairness through an assessment of academic potential and financial means.

Whilst the majority of funding is set aside for bursaries, over 200 further children benefited from non-means tested academic and specialist scholarships in 2023/24. Where bursary applicants are eligible for scholarships, these will be included within the overall award.

Although means-tested bursaries awarded on entry to the School (usually at 11+ or in the Sixth Form) are usually awarded for the duration of a child's time in the School, they are subject to regular review and may be varied upwards or downwards, depending on parental circumstances and the child's academic performance and behaviour.

A Bursary may be awarded where applicants achieve highly in the 11+ or 16+ academic assessment or are recommended for a Specialist Scholarship (as set out above) but require additional funding to allow them to take up the place. All bursaries are independently means-tested to ensure that the bursary award is appropriate to the financial need.

The success of a bursary application is dependent on two main criteria:

- First, by performance in the 11+ or 16+ academic assessment and/or in the assessments for specialist awards. A number of additional factors are also taken into account including relevant information relating to character and values.
- Second, should assessment against the admissions criteria be sufficiently strong, a financial assessment will be carried out to determine need.

Requests for financial support usually fall into two categories:

- New applicants to the School, primarily at 11+ or into the Sixth Form, where a place has been offered but parents/guardians are unable to fund the tuition fees. These are referred to as 'Bursaries'.
- Existing Senior School pupils where a change in parents' circumstances has resulted in difficulty in meeting tuition fees and may result in the child being withdrawn part way through a year. Such support is referred to as 'Hardship Awards'

### **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
- Information to prospective parents
- Liaison with local schools to identify pupils who might not otherwise consider a fee-paying school

### The Application Process.

Bursaries are available to parents/guardians of children entering Year 7 (First Year of the Senior School) or Year 12 (Lower Sixth Form) of Brentwood School. (This is set out in the School's Admission's Policy on the School website). They are awarded at the discretion of the Governors on the recommendation of the Headmaster. The Deputy Head (Academic) and the Finance Director are responsible for the management and coordination of the academic and financial reviews required in the process.

- Step one – parents or guardians seeking a bursary are required to complete an on-line Bursary Application which seeks to establish the financial circumstances of all those within the household(s). Where a parent indicates via OpenApply (the

School's Admissions portal) that they wish to be considered for a bursary, they are sent a link (during September/October) to the Brentwood School secure bursary portal and must complete a detailed financial application. This application, which requires details of income, expenditure, assets and liabilities must be submitted **no later than 1<sup>st</sup> November** in any year for bursaries to start the following September. The bursary application will need to be submitted by all those with parental responsibility for the child for whom the application is made. Where parents are separated, financial information will be requested from each parent separately via their own confidential login to the Bursary Portal. Financial information should include any spouses/partners within the household.

- Step two – once the results of the Entrance Examination or other academic or specialist assessment are confirmed, the bursary applications (and supporting financial documentation) of those children who have performed particularly well against the admissions criteria set out in the Admissions Policy will be released via the secure Bursary portal to BAL. BAL will contact these families to arrange an interview. This will usually be in the form of a zoom or telephone interview but may involve a home visit. Families of children who have not met the necessary criteria (including where bursary applications do not meet the financial criteria for a bursary) will be contacted by the Admissions Team to confirm that their bursary application is not being put forward for financial assessment.
- Step three – BAL will carry out interviews at the end of January following the academic and specialist assessments. During the interviews they will review supporting documentary evidence and assess the financial means of the households of all those with parental responsibility. Following their interview, BAL will issue a confidential report to the Finance Director, recommending the level of bursary, if any, required for a child to attend the School. We reserve the right not to progress the bursary application further where a parent fails to attend the confirmed interview or provide full financial information.
- Step four – where an application has met the admissions criteria and the financial report from BAL indicates that financial assistance may be required, the Director of Development will arrange an interview via Zoom with the parents.
- Step five – following the interviews, the final recommendations for awards are presented to the Governors' Scholarships & Awards Committee for approval.
- Step six – Parents or guardians are advised of any bursary offer. A full fee place will not normally be offered where parents have confirmed as part of the bursary application process that they require substantial financial support for their child but where it is not possible to offer a bursary. The intention is to avoid offering a place where it is unaffordable for the family.
- Step seven – Parents/guardians are required to sign an Acceptance Form accepting the place at the School and an acknowledgement agreeing to any conditions relating to the bursary. A copy of the Conditions of Awards can be found [here](#).

### The Case for Assistance.

A number of factors will be considered 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 – A child's suitability is assessed against the admissions criteria set out in the Admissions Policy.
- Financial limitations – although, only those with strong academic achievement or where additional factors are taken into account as set out in the admissions criteria, will be considered for bursaries, 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 by independent specialist assessors, BAL, on its own merits and awards are made accordingly subject to funds set aside for this purpose. In making their recommendation, BAL will assess the 'maximum amount' that a family has available to fund school fees through income and adjust this to take into account any savings which could be made or other potential sources of funds.

The School has a duty under its charitable obligations, to ensure that all bursary grants are well focused and so, during interviews, as well as current earnings, BAL will also consider the following elements:

- The ability to improve the financial position or earning power of the family. For example, where there are two parents, both would normally be expected to be fully employed unless one is prevented from doing so through incapacity, the need to care for children under school age or other dependents or other reasonable factors
- 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. Where, for example, a home is considered to be too large, in an expensive area or where excess equity could be released, a family may be expected to downsize or re-mortgage as necessary to release funds. It is also expected that savings in shares, ISAs, other investments and equity in second homes will be released.
- In cases of divorce or separation, the contribution made by all those with parental responsibility and other adults within the parents' household(s).
- Contribution to household costs by other, wider family members, any adults unrelated to the child or by outside sources.
- Where fees are being paid for siblings at Brentwood or other schools or in providing university support, the bursary may take into account these outgoings. However, where children attend other fee-paying schools, Brentwood would not expect to be the only School providing bursary funding.
- The School considers that the following would not be consistent with the award of a bursary: frequent or expensive holidays; new or luxury cars (including on finance plans); investment in significant home improvements; a second property/land holdings; overpayment of mortgage or pension contributions.
- Whether the application and supporting evidence present a complete and fair view.

If in doubt of eligibility for a bursary, the School encourages parents to apply.

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- Other factors- it is recognised that, in addition to academic and/or specialist ability and financial constraints, there may be other circumstances that should be considered. These include:
  - o Where the social needs of the child are relevant.
  - o Where a parent/guardian is terminally ill or is unable to secure permanent employment due to poor health.

#### Existing Pupils – Change in Family Circumstances

Although bursary awards are usually made on entry to the Senior School or Sixth Form, the School sets aside each year a hardship fund for cases of **sudden, unforeseen need** or where applications meriting financial 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 Senior School whose financial circumstances suddenly change may apply for a short term hardship award via [bursaryapplications@brentwood.essex.sch.uk](mailto:bursaryapplications@brentwood.essex.sch.uk).

Such short-term hardship awards are usually given for one or two terms to allow parents breathing space to make alternative arrangements for their child to attend a non-fee paying school. (Where hardship is advised to the School in the summer holidays, a short-term award may be provided for the Michaelmas Term.) The term of the Hardship Award may be extended at the Headmaster's discretion where a pupil is in a public examination year.

While the School is committed to providing short-term support to families where there is a genuine and unforeseen hardship, parents should be aware that such support is limited and will not continue beyond the end of the academic year in which the award is made.

In summary, short-term hardship applications will be assessed using the following criteria in order of priority (**and are subject to funds being available**).

1. Pupils in any year group impacted by the sudden death or serious illness of a parent or pastoral circumstances of a similar magnitude
2. Pupils in examination years (Y6, Y11 or U6)
3. Senior School pupils in Y9 or Y10 where there are exceptional circumstances which could not have been foreseen prior to commencing at the School
4. Other pupils

In order to be fair to all and ensure our limited funds are used to help as many families as possible, those with younger children also in independent education will be asked to consider non-fee-paying alternatives for those children before a hardship bursary is awarded for the elder sibling.

#### **In-School Applications for Bursary Awards (other than at Y7, Sixth Form or on other entry to the School)**

Bursary awards are made prior to entry into Year 7 and Lower Sixth and the School does not typically have funds to make further awards at any other time. However, where parents of current Senior School pupils believe that they are likely to need ongoing financial support with fees, beyond the term of any hardship award, they are encouraged to contact the Finance Director to apply for a bursary to enable their child(ren) to continue in the School to the end of the Key Stage. Bursaries are not available for Prep pupils.

The bursary assessment would then be subject to the normal academic and financial assessment (as for new applicants to the School). **Parents should be aware that a child would usually be expected to be achieving in the top quartile of their cohort or where there are exceptional pastoral reasons to be considered for a bursary award.** This ensures that late bursary applications are assessed on a consistent basis with bursaries provided on entry at 11+ or in the Sixth Form.

Parents should be aware that bursary applications for a child who is already a pupil at the School are unlikely to succeed where financial need could reasonably have been foreseen at the time of application for entry to the School. In such circumstances, parents would have been expected to have completed a bursary form as part of the application process to ensure that their application could be assessed fairly in relation to others applying for bursary funding at the time.

#### Regular Review

The School will arrange for all means tested awards to be subject to a full review in Year 9 and Year 11 in advance of moving to a new Key Stage. The School may also request a review of means tested awards in intervening years. In all cases, the Parents shall be required to complete a full financial disclosure. The review will be carried out by external assessors on the School's behalf. After any review, the School reserves the right to vary the value of the award with immediate effect and will confirm the new value in writing to the Parents. An award will also be adjusted or removed where Parents fail to provide full financial information when requested. This ensures that the School's charitable funds continue to be applied fairly and equitably.

The Headmaster, in making his recommendation to the Scholarships & Awards Committee, also has the discretion to recommend to the Governors the reduction or withdrawal of an award 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 or lack of cooperation with the annual review process. Continuation of any award is dependent upon the conditions of the award being fulfilled.

#### Confidentiality

Whilst we celebrate our bursary holders, under the Conditions of Award, it is a requirement that the value and terms and conditions of the award remain confidential. A breach of this confidentiality may result in the withdrawal of the funding.

### Data Protection

Completion of the bursary application may be time consuming and will involve a degree of intrusion by the School and its specialist assessor, BAL, into a family's private financial affairs. Applicants may be assured that their bursary information submitted via the Bursary portal and any confidential reports from BAL will be carefully handled. If a child gains a place, the application form, BAL's confidential report and annual review form will be retained digitally for our records. If, by the September following the application, the child does not enrol at Brentwood School, application forms and reports will be deleted from our records.

In signing the Bursary Application, parents/applicants are giving their explicit consent to the sharing of this information with our specialist assessors, BAL. Without this explicit consent, we will be unable to give any further consideration to bursary applications.

The law requires that we hold basic accounting information on grants for at least six years. Information will not be held longer than needed and all the papers on file, other than a note of your name, will usually be shredded within seven years of our last contact with you.

Information concerning the value of bursaries is kept confidential within the Bursary and shared only with those involved in the award of bursaries. However, to ensure that we provide tailored support to bursary holders throughout their time at Brentwood School, we have a dedicated Bursary Mentor who is available to provide pastoral support and to be an intermediary with teachers. We are proud of our highly successful bursary programme. Our bursary students achieve highly both in and outside the classroom and are invariably highly motivated and engaged, making the most of the opportunity provided. Many of our older bursary students become bursary Ambassadors, encouraging other deserving families to apply to Brentwood.

Any questions pertaining to the financial aspects of bursaries should be directed to the Finance Director ([bursaryapplications@brentwood.essex.sch.uk](mailto:bursaryapplications@brentwood.essex.sch.uk)).

### 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. Brentwood School encourages parents/guardians to apply for support where it is felt a good case can be made for assistance. The following organisations offer information and advice on obtaining assistance with fees:

- The Educational Grants Advice Service +44 (0) 1932 865 619
- The Educational Trusts Forum: [www.educational-grants.org](http://www.educational-grants.org) who can signpost to other organisations eg. *The Emmott Foundation, Thornton-Smith & Plevins Trust, The Cannon Holmes Trust*
- *The Scholarship Hub* [www.thescholarshiphub.org.uk](http://www.thescholarshiphub.org.uk)