

# The Mill Hill School Foundation

## Bursary Award and Policy Procedure

February 2020

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## BURSARIES

### 1. Introduction

The Mill Hill School Foundation (the “Foundation”) aims to provide excellence in education, to support pupils in the passage from childhood towards adulthood and develop in every pupil self-discipline, responsibility, spiritual and moral values, leading to the highest possible standards of behaviour, consideration for others, pride in oneself and in one’s achievements.

To this end the Foundation is committed to broadening access to Mill Hill School (MHS) and Belmont Mill Hill Preparatory School (Belmont) [ the ‘Schools’] by offering to eligible Parents and/or those who have Parental responsibility (i.e. legal responsibility) for a child at the Foundation [the ‘Parents’] means-tested financial assistance with the payment of schools fees. Such assistance is known as a Bursary and may be awarded in the form of annual financial assistance of up to 100% of tuition fees payable, depending on the financial, compassionate, or other pertinent circumstances of applicants.

The Bursary Award does not cover the costs of the Registration Fee, Acceptance Deposit, or any extras except for those stipulated when the award is made. In exceptional circumstances additional assistance may be provided to help Parents meet the other costs of a child’s education at the Foundation, such as the Acceptance Deposit and extras.

Bursaries may be made available to Parents of children entering Year 7 (11+) of Belmont and Year 9 (13+), Year 10 (14+) and Year 12 (Sixth Form) of MHS. (See the Foundation Admissions Policy). The Foundation does not offer bursarial support to Parents of pupils at Grimsdell Mill Hill Pre-Preparatory School and The Mount, Mill Hill International. Bursary Awards are made on admission to the Foundation and an application for Bursary support from parents who have already accepted a place on a full fee basis will only be considered in very exceptional cases, and then only for pupils in MHS.

This policy has been authorised by the Court of Governors who are the trustees of the Mill Hill School Foundation [the ‘Charity’]. It is addressed to prospective and current Parents and pupils and to all members of the teaching and administration staff. The Policy, together with all ancillary documentation, is made available to all prospective and current Parents on request.

The Policy contains an overview of the Bursary Scheme currently in operation at MHS and Belmont and details the procedure for applications and awards.

A Bursary Award is subject to the Foundation’s ability to fund such awards within the financial resources available to it and not every eligible application for a bursary will necessarily be successful.

### 2. Bursary Awards

#### 2.1 Aims of the Foundation Bursary Award Policy [‘the Policy’].

The aims of the Policy are as follows:

- to ensure compliance with the Foundation’s charitable purposes
- to offer awards to a child who will benefit from an academic education and who will contribute to and benefit from the ethos and activities of the Foundation community. The Foundation will only admit a child who has met the academic criteria in accordance with the Foundation Admissions Policy
- to offer children of Parents eligible for means-tested financial support as a consequence of financial, compassionate, or other pertinent circumstances, the opportunity to benefit from a Foundation education through the provision of bursarial support
- to broaden access to a Foundation education to children of the highest educational calibre

- to ensure that all applicant families for bursarial support are considered equitably and consistently
- to ensure that no applicant family for bursarial support is treated unfairly on any grounds including race, colour, nationality, ethnic or national origin, religion or religious belief, sex or sexual orientation, marital status, disability, or age

## 2.2 Scale of Awards and Annual Review

Bursary awards are subject to an evaluation and review by the Director of Finance and Resources (DFR) of Parental financial circumstances each year and may be varied upwards or downwards, depending on individual Parents' circumstances (e.g. their savings, investments, assets and liabilities, as well as their gross joint income), as well as compassionate or other pertinent considerations. The annual review will consider the impact of planned changes in tuition fees.

Bursaries are awarded at the discretion of the Governors on the recommendation of the Bursary Committee. The DFR is responsible for the management and coordination of the process.

Recommendations to the Governors are made after applications have been considered by the Bursary Committee which comprises:

- The CEO, Mill Hill School Foundation
- The Head of Mill Hill School
- The Head of Belmont
- The DFR

## 2.3 Categories of Requests for a Bursary Award

- **Admission Bursaries:** New entrants to the Schools, where a place has been offered but Parents are unable to fully fund the School fees themselves.
- **Hardship or Emergency Bursaries:** The Foundation recognises that a family's financial circumstances may suddenly and substantially change during a child's time at the Foundation because of a sudden, unforeseen change in Parents' circumstances which has a long-term material impact on the ability to pay fees with the result that the child is likely to be withdrawn part way through a stage of education. Typically, such exceptions are likely to include the death of the parent who is the main earner and/or the terminal or acute illness of one of the parents, which forces the other parent to care for the other with the consequential loss on earnings. Hardship or emergency bursaries will not be considered in cases of unemployment, redundancy, separation, or self-employed business difficulties.

## 2.4 Pre-testing applications for children in Year 6 or Year 7 for entry in Year 9 to Mill Hill School.

The Foundation offers a pre-testing application for children in Years 6 and 7 for admission and entry in Year 9 to Mill Hill School. Please contact the Mill Hill School Admissions Office for information and guidance on the pre-testing application procedures.

A parent who wishes to apply for an Admission Bursary when their child is applying for entry to Mill Hill School through the pre-testing application procedure is required to follow the relevant guidance set out below in Clause 3: Eligibility and procedure for applications.

An offer of a pre-testing application bursary for Year 9 made to a child in Year 6 or Year 7 will be provisional only and subject to a re-assessment of the family financial circumstances in the Autumn of Year 8.

### **3. Eligibility and procedure for applications**

#### **3.1 Step One: Confidential Statement of Financial Circumstances in support of an Application for a Bursar.**

All Parents, whether seeking an Admission Bursary or a Hardship or Emergency Bursary, are required to complete a Confidential Statement of Financial Circumstances in support of an Application for a Bursary (the 'Form') that seeks to establish the financial circumstances of the fee payer(s). The Form, requests details of both Parents' income, outgoings, assets, and liabilities. The Form will be provided on written request to the Head of the relevant School or the DFR. This Form must be completed accurately and in full and must be accompanied by full supporting documentary evidence. Incomplete Forms will be returned and not considered until completed in full. The initial determination of qualification for a bursary will be dependent on the financial circumstances of the Parent(s). The Schools need this information so that they may assess those families with the greatest financial needs and may consult with Parents about the financial commitment which the family can reasonably make to cater adequately for the child's needs both during the admission process and if an offer of a place is made.

In exceptional circumstances and with the written agreement of the Head of the relevant school or the DFR, late applications will be considered in accordance with the procedure described in this Policy and will be subject to the School's ability to fund these within the context of availability of funds.

#### **3.2 Step Two. Assessment of Suitability**

The DFR will assess the eligibility and financial circumstances of each Parent and make recommendations to the Foundation Bursary Committee with regard to the number and level of awards to be made in the coming academic year. The Foundation Bursary Committee will consider a number of factors when making the judgement as to the justification for financial support, and the extent of such financial support.

##### **3.2.1 Interviews**

An applicant family considered by the School to be a potential candidate for either an Admission Bursary or a Hardship or Emergency Bursary award may be invited to attend an Interview (the 'Interview') with the DFR at which time their bursary application will be discussed in more detail. The DFR will usually conduct the interview.

##### **3.2.2 Home Visits**

The DFR or a delegate, accompanied by a colleague, may conduct a home visit in support of a Bursary application to ensure the information has been correctly presented and interpreted and that the basis of the financial assessment is fair. A minimum of two days' notice of such visits will be provided to Parents and it is expected that one or both Parents are expected to make themselves available for this visit.

#### **3.3 Step Three. The Procedure for determining awards.**

The Bursary Committee will decide on individual cases and the total allocation of Bursary awards each year based on the joint recommendations of the DFR and the Head. The Bursary Committee will notify the Finance Committee of their decision as part of the annual budgeting cycle.

## **4. Admissions Bursaries**

### **4.1 Applications**

Parents who apply for an Admission Bursary must return the completed Form, together with the necessary documentary evidence, to the DFR no later than the date shown on the admissions schedule for that year for bursaries to start in the September of the following year..

The School will not consider an application for a bursary unless the child for whom the Parents seeking bursarial assistance is registered for admission and entry to the School.

### **4.2 Assessment of Suitability**

Each child for whom an Admissions Bursary application has been made will be assessed for suitability for entry to the relevant School in accordance with the Foundation's Admission Policy and procedures. Bursary Awards are means-tested based on the Parent's financial circumstances, however, attention will be given to the academic assessment for each applicant where the Foundation determines it is unable to support all eligible applicants. Bursary funds are limited, and priority will be given to those who, in the view of the Foundation Bursary Committee, are most likely to make an outstanding contribution to the academic or extra-curricular life of the relevant School. Each pupil to whom support is offered must, in the opinion of the Head, be likely to make good academic progress following admission and possess the potential to develop the quality of his or her work, and benefit from extensive participation in the wider, extra-curricular activities on offer at the relevant School. In normal circumstances, each applicant for financial support should at the very minimum meet the relevant School's normal academic requirements. The confidential reference received from the child's Head Teacher and previous school reports will be consulted for evidence of good behaviour.

It is recognised that, in addition to academic ability, the potential to contribute to and benefit from the ethos and activities of the school and financial constraints, there may be other circumstances which could be considered, these might include:

- Where a child has siblings at the School
- Where the social needs of the child are relevant

### **4.3 Award**

An offer of a Bursary is conditional on the offer of a place at the Foundation which is subject to the successful completion of the Admission Procedures which are set out in the relevant School's Admission Policy. The Parents are advised whether their child is to be offered a place at the School and of the Bursary offer, if any. Parents are then required to sign the appropriate documentation for the acceptance of a place at the School and the Bursary including their agreement to any conditions relating to the Bursary.

Parents who have made a pre-testing application for admission and entry to Year 9 at Mill Hill School for their child will be advised whether the child is to be offered a place. Those who have been offered a place and who have applied for an Admissions Bursary under the pre-testing application procedure will be advised of one of the following:

- That a provisional Bursary is being offered, or
- That the School is not able at this time to confirm that a Bursary will be available or
- That no Bursary is being offered

The offer of a pre-testing application provisional Bursary will be subject to a further assessment of the Parent's financial circumstances in Autumn of Year 8 when a new completed Form, together with the necessary documentary evidence, must be returned to the DFR no later than the closing date shown on the admissions schedule for the relevant academic year of entry for bursaries to start in the September of the next academic year. Following this further assessment, the final sum being awarded will be confirmed. If the School advises that a Bursary is not being offered the Parents may cancel, without penalty, their acceptance of the offer made as part of the pre-testing application and any acceptance deposit will be refunded.

#### **4.4 Expectations**

The Foundation expects that a pupil in receipt of an Admission Bursary award will, subject to good conduct and academic attainments and contribution to the School community, progress through the Foundation and complete the Upper Sixth Year at Mill Hill School.

### **5. Hardships or Emergency Bursaries**

#### **5.1 Applications**

Parents with one or more children at Belmont or Mill Hill School whose financial circumstances suddenly change may apply for a bursary to the Head of the relevant School explaining their situation in line with the circumstances outlined above. If appropriate, a Bursary Application Form will be provided by the DFR for the Parents to complete. The award of a Hardship Bursary is at the absolute discretion of the Head of the relevant School and the DFR.

#### **5.2 Assessment of Suitability**

Hardship or Emergency Bursary applications will be considered initially by the Head of the relevant School consulting with the DFR who will consider a number of factors when making the judgement as to the justification for financial support, and the extent of such financial support to be offered, if any. In addition to the exceptional circumstances outlined at paragraph 2.3 the pupil's academic ability and potential to contribute to and benefit from the ethos and activities of the School are the first considerations in granting support.

Each pupil to whom support is offered will be expected to make very strong academic progress, develop the quality of his or her work, and participate extensively in and contribute to the School community.

#### **5.3 Award**

Such awards are at the discretion of the Governors on the recommendation of the Bursary Committee and are subject to the availability of funding and, even where the basic conditions set out in this Policy are met, cannot be guaranteed.

Hardship or Emergency Bursaries may be awarded on a termly or annual basis, or to help with a one-off cost, such as a school trip.

## 6 Financial Limitations

The level of bursary awards made each year varies according to the number of applicants and funds available to distribute for bursaries. The Foundation will consider whether Parents are eligible for Bursary support within a range of gross joint income (means), where the upper range of income (means) may change from time to time subject to funds available for Bursary support.

Bursary awards are means-tested based on gross (pre-tax) joint income. This includes benefits, maintenance payments and other sources of income. For the self-employed the Foundation refers to net profit, but gross profit and turnover are also considered. Assets (such as savings, investments and second homes) will also be considered in the assessment, especially where they are significant.

It is recognised that judgements about what sacrifices the Parents should make to pay school fees will be personal. However, the Foundation has a duty to ensure that all Bursary awards are carefully and comprehensively considered and so, as well as current earnings, other factors which will be considered in determining the appropriate level of award will include:

- The ability to improve the financial position or earning power of the family
- 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
- Acknowledging that others might have a different view, the Foundation considers that the following examples may not be consistent with the receipt of a Bursary:
  - Frequent or expensive holidays
  - New or luxury cars
  - Investment in significant home improvements
  - Second property/land holdings

## 7. Annual Review

All Bursary awards are subject to a review of Parental means each year and may be varied upwards or downwards depending on Parental circumstances. Current Bursary holders will be issued with further means-testing forms at the beginning of January each year for return by the end of the month.

As part of the renewal process, the DFR, will consult with the respective Head to ensure that the Conditions of the Award continue to be met and he/she will also notify the Head where there is likely to be a significant reduction or withdrawal of an award. Any changes in the Parent's financial circumstances will be considered and may result in the reduction of the amount of a Bursary award or the removal of a Bursary award. The determination of a Bursary award is at the discretion of the Governors on the recommendation of the Bursary Committee.

## 8. Applications by Bursary Award holders for additional financial support during the academic year for remission of additional charges incurred at the School

### 8.1 Bursary Award of 100% fee remission:

Bursary award holders whose award provides a total of 100% fee remission will not be charged for those items we consider would normally be incurred by a pupil at the School which may include such charges as the Subscription for the Sixth Form (including surcharge) and the Old Millhillians Club; his or her House events when the pupil is expected to attend; School and House Awards; public examination fees and Morrisby careers test fees; the course finder and UCAS convention charges.

In addition, no charges will be made for School events which the pupil is required to attend, such as a curriculum course or field trips. School sports trips where the pupil is an essential member of the team and CCF camp will be considered on a case by case basis. No charge will be made for CCF kit unless kit is lost or not returned.

Those pupils whose 100% fee remission includes the awarding of a Music Scholarship will not be charged for the hire of a musical instrument, where it is their main instrument or an additional one agreed by the Director of Musical Performances at MHS and Director of Music at Belmont, nor for music examination fees. For those pupils at Belmont who have 100% fee remission and will be required to use the Late Room whilst waiting for the bus at the end of the school day, there will be no charge for the Late Room.

Consideration will also be given to assisting with the costs of transport and uniform, subject to individual circumstances and the availability of funds.

## **8.2 Other Bursary awards of less than 100% fee remission:**

The DFR, in consultation with the Head, will consider applications to assist Parents in receipt of a Bursary award to meet the cost of School trips or other remission of charges on an individual basis. Any such application should be made in writing to the Head of the relevant School as soon as possible before the trip or event or charge is incurred, and ideally before the start of the term in which the charge is to be made. The determination of any additional financial support will be subject to the individual circumstances and is intended to be a contribution to the total cost or charge. Any support offered is at the discretion of the Head and subject to the availability of funding and cannot be guaranteed. All applicants for additional financial support will be expected to contribute to the cost of the trip or other charge on which relief is sought.

All Bursary awards of additional assistance shall be subject to review in accordance with the conditions of award provided in the letter of offer.

## **9. Conditions of Award**

All new Parents seeking Bursary support and those awarded continuation awards on renewal will be asked to sign and comply with the Conditions of Award for Bursaries and Scholarships.

## **10. Confidentiality and Data Protection**

All bursary applications are treated in the strictest confidence. All information provided by the Parents will be processed in accordance with the Data Protection Act 2018 and the Foundation's Privacy Notice, which can be found on the Foundation's website. It will be used for the purpose of assessing the need for a bursary and not for any other purpose.

## **11. Retention of Financial Information**

The Foundation will:

- store Financial Information and other confidential documents provided by an applicant family either in locked, non-portable storage containers or in an encrypted form on the Foundation's server and access will be restricted to *those members of the Foundation entitled to see it as part of their duties*
- retain all relevant financial Information and associated correspondence in accordance with the Foundation's Retention of Records, Policy and the Data Protection Act 2018

## **12. Other Sources of Bursary Assistance**

In addition to the Foundation's own Bursary funds, there are several 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. The Foundation encourages Parents 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:

Ms J Warbey  
EA/CEO  
The Mill Hill School Foundation  
Walker House, Millers Close, The Ridgeway, London NW7 1AQ  
Telephone 0208 959 8131

## **13. Review**

The Foundation will review this policy on a biennial basis. The next review is scheduled for Summer 2021.

**This Policy was approved by the Bursary Committee on 3<sup>rd</sup> February 2020**