



A GUIDE TO BURSARIES

(Dated Dec 2023)

What is a bursary?

The Governors of Strathallan School are committed to supporting deserving pupils and to broadening access to the School by offering means-tested financial support towards the payment of school fees - such awards are referred to as 'Bursaries'. Bursary awards are made in terms of a % remission (money off) of the full fee and they are assessed according to the parents' ability to pay full fees and the availability of bursary funds to the School. Parental assets and income are assessed and bursaries may be awarded up to 100% of the full fee but the vast majority will be at a lower level. Full 100% Bursaries are not normally awarded to pupils seeking entry to the Prep School (ie below 3rd Form(S2)).

Unlike some Schools who are fortunate enough to fund bursaries through endowment funds, Strathallan essentially funds such support from fee income. We have begun a Bursary fund in order to assist in the making of charitable awards, but in the nature of these funds, this will take many years to build up to a position where this will materially effect the amount of support that can be given. Parents applying for a Bursary should therefore be in no doubt that the availability of funds is limited and that charitable principles must be followed – please pay particular attention to the eligibility and 'case for assistance' criteria which follows in this guide.

This document aims to cover the application process in further detail and to outline the eligibility criteria that should be considered ahead of making an application. Any parent or guardian wishing to apply for a Bursary is encouraged to contact the Bursar's Office at any time for support and guidance with the process; please rest assured that confidentiality is guaranteed every step of the way.

Who is eligible?

Bursary support is only available to 'core pupils' at the School – and are not available to any short-term students. Where possible, Bursary Applicants must be registered for entry and have been offered a place at the School or have achieved the standard required for entry. A parent submitting a Bursary Application should be able to demonstrate that they are committed to sending their child to Strathallan and it might compromise an Application if this is considered not to be the case, in particular if it is felt that a parent is 'shopping around' for the best remission possible.

Owing to high demand for places at certain entry points and the limited funds available, bursary support will generally be prioritised for Senior School years and directed towards boarding places, but it should be noted that awards are still possible to Day and Prep School Applicants.

Only in exceptional circumstances will the School consider Bursary Applications from families living abroad due to the practical difficulty in undertaking the necessary due diligence in reviewing the parents' financial situation.

How is a bursary awarded?

Awards are made on the basis of affordability, a process known as 'means-testing'. A thorough review of the family's financial circumstances will take place including a review of:

- Income
- Savings, investments and realisable assets
- Size of the family anticipated to wish to come to the School and number of dependents not at the School.
- Aspired entry point into the School



The application process

Bursary applications should be made in writing to the Bursar who will request that the parent/s complete a Bursary Application Form. The Application form **must be fully completed** before it will be reviewed by the School. In completing your Application, we would particularly recommend that you follow the deadlines given and complete your Application thoroughly and to the highest standard. We do require parents to adequately answer question 13, which asks how much money they consider they have available per annum for School fees following their own financial review. This should be a monetary value, and in the case of boarding pupils should reflect the saving to household bills that not having a child at home will produce. **We do require original supporting documentation and so electronic copy is not sufficient** – we will copy all supporting documentation and return it to you.

The Application will be reviewed in the strictest confidence.

The Parent contract includes providing permission for the school to access a third-party credit reference agency, parents should note that in applying for a Bursary Award from the School will make this more likely in order to verify the financial figures as supplied on the application form and to assist with the Bursary application process.

The School undertakes its main Bursary award process in March and April. The Bursary awards process has two functions: firstly, to decide the priority of who should receive an award and secondly, the scale of the award. The School reviews the academic and overall strength of the Bursary candidate, taking due cognisance of any social or educational circumstance and put the candidates in priority order. Bursary funds are limited and, all things being equal, priority will be given to those likely to gain most from and contribute to a Strathallan education. The Bursar and Finance Manager then review the financial need of each candidate and allocate bursary funds appropriately and in accordance with the priority order given to them until such bursary funds as are available are exhausted.

We appreciate such a process might seem daunting, so please contact the Bursar on **01738 812 504** or bursar@strathallan.co.uk if you would like to discuss your circumstances in person. All your information will be treated with complete confidentiality.

Below is a guide to the standard stages of a Bursary Application:

Stage 1 (Autumn & Spring Terms)

Register your child with the Admissions Department as the admissions process runs parallel to the bursary process. It will assist a parent's chances of securing an award if the School has had the opportunity of meeting both the pupil and the parents so that we can assess the academic achievement and other potential of the pupil.

Stage 2 (end of Autumn Term/Early Spring Term)

Parents/guardians seeking a bursary are required to complete an application form to establish the financial circumstances of the household. The form, which requests details of income, expenditure and capital, is available by contacting the Bursar's PA at bursarpa@strathallan.co.uk

Stage 3 (Mid-Late Spring Term)

The Bursar & Finance Manager assesses all applications in order to establish the likely level of support required. This is likely to involve follow-up correspondence or a meeting with the parents to ensure the information has been correctly interpreted and the basis of the financial assessment has been fair. Although not routine, a home visit may be required as part of the assessment process.



Stage 4 (Mid-Late Spring Term)

The Bursar prepares a recommendation based on the assessment. This is then considered by the School's Bursary Awards Panel and a joint decision reached.

Stage 5 (Mid-Late Spring Term)

Following a review by the School Bursary Awards Panel, and subject always to the School offering the pupil a place, the Bursar will write to individual parents informing them of any bursary remission awarded. The parent is then required to write confirming acceptance of the award (and place at the School if not already done so) and the conditions relating to it within seven days, in order to allow funds to be redirected to worthy alternative pupils if the offer is refused. Should parents feel that the award is insufficient to allow the pupil to attend the School, they should contact the Bursar immediately.

The case for assistance

Whilst the School accepts prospective parents will reflect varied backgrounds and employments, Bursary Applicants will be expected to be doing all they can in terms of employment and lifestyle to be able to pay the school fee, as a charitable means-tested award cannot be expected to support life-style choices. For instance, the following factors will be considered in addition to current earnings and financial assets:

- Have you taken all opportunities to release capital either through increased mortgage(s) or sale of investments? Significant capital savings and investments are expected to be used for the payment of school fees as are significant equity values in houses
- Are you able to improve the earning power of your 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.
- 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;
- Where reasonable fees are being paid to other schools (or universities) the school's level of support will ordinarily consider these outgoings and whether you have applied for a bursary there? We will consider commitments to the education of other siblings, but will expect you to have made Bursary applications to the other schools also;
- 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;
 - new or luxury cars;
 - investment in significant home improvements;
 - significant discretionary costs in relation to lifestyle/leisure interests
 - a second property/land holdings.
- If you live locally, have you considered day fees? We would expect you to consider a day place if you live locally and boarding fees are beyond your means.
- Strathallan School may refuse to offer a means-tested Bursary on the grounds of high levels of assets, even if cash or earnings are low when parents choose not to liquidise or obtain funds against such assets.



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:

- Where a child has siblings at the school;
- Where the social needs of the child are relevant (e.g. may be suffering from bullying at their present school);
- Where a parent is terminally ill or is unable to secure permanent employment due to poor health;
- Where a separation may result in the child having to be withdrawn from the school adding to the stress of coping with the parents/guardians separating.

The ultimate obligation to finance school fees lies with the parents of the pupils. Financial support in the form of a means-tested Bursary will only be considered after all other avenues for financing school fees have been exhausted.

Scholars

Parents of a pupil awarded a scholarship who remain unable to afford the fees, are also entitled to apply for a bursary. Scholars who merit an additional bursary award will normally take precedence over non-scholars. If a pupil, having previously been awarded a Bursary, is then awarded a scholarship, the scholarship will have no additional monetary benefit on the basis that the Bursary award will have been made at a level that makes the fees affordable and so whilst the pupil will receive a scholarship award, the Bursary will be readjusted to reflect the value of the scholarship.

Deadlines

Entry in Academic Year 2023/24: All Bursary awards for entry in Sept 23 have been made and no further funds are available.

Entry in September 2024 for Academic Year 2024/25

New Bursary applications for Entry in September 2024 should be with the School by the **Friday 2nd February 2024**. Bursaries are NOT awarded on a 'first come first served' basis and so parents are advised not to submit forms more than three month's early, as they may be asked to resubmit a full, revised Bursary Form closer to the deadline, to ensure that their financial situation on the Application is as up to date as possible.

Please note that if an Application is received after the deadline, the Application can still be processed and an award made but only if Bursary funds remain after the initial Awards process has been completed.

Unsuccessful Applications

Please recognise that the number of families applying for fee assistance invariably exceeds available funds and so Bursary support cannot be guaranteed however deserving the Application – and inevitably there will be those we cannot help even though we accept that their Application would merit an award.

The Registration Fee will only be refunded to unsuccessful applicants who, following means-testing would have been eligible for an award, but who did not receive one through lack of bursary funds. In all other cases the Registration Fee will be non-refundable.

The School will not enter into any detailed discussion with families who are not successful in securing an award.



Existing pupils - change in family circumstances

Bursary applications for current pupils can be made at any time as the result of an unforeseen change of circumstance in the family financial situation which leads to a genuine difficulty which would otherwise necessitate the removal of the pupil. Parents experiencing such financial difficulty should contact the Finance Manager or the Bursar without delay as Bursary awards cannot be applied retrospectively in order to remove a fee debt. However, such awards remain subject to the availability of funding and cannot be guaranteed. Emergency Bursaries will also be awarded on a **temporary** basis and will not be guaranteed for the remainder of the pupil's education

For the avoidance of doubt, Bursary support for existing pupils is only available if the events leading to the application were demonstrably and unequivocally unforeseeable at the time the child joined Strathallan or that such an approach was authorised by the Bursar when the pupil joined the School.

Review

Bursaries are reviewed on a regular basis whereby parents are required to resubmit details of their financial situation to ensure that they still merit an award and may be varied upwards or downwards depending on parental and family circumstances. Should parents not adequately engage with the review process, or fail to inform the School of an improvement in their financial circumstance whilst in receipt of a Bursary, the School reserves the right to remove the award in its entirety.

While not linked to specific levels of achievement such as with a scholarship, any bursary award is based on the understanding that the pupil will by his/her application, behaviour and involvement in the School community merit such an award on an ongoing basis. Should the pupil's application, behaviour or involvement fall below the standards expected, the School reserves the right to remove the award. The Head and Bursar have the discretion to recommend to the Governors the reduction or withdrawal of 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 any contribution they are making to the fees, or by a failure to comply with the Terms and Conditions of the Parent Contract.

Extras

Bursary awards apply to tuition and boarding fees only. Extras must be paid in accordance with the Terms and Conditions of the School. Any extras above £250 to be incurred on behalf of a pupil in receipt of a bursary award for a trip or event should be approved by the School before a commitment is made.

Confidentiality

The school respects the confidentiality of Bursary awards made to families and recipients are expected to do likewise.

Acknowledgment of and 'Giving Back' in respect of Bursary Support

Strathallan School celebrates the opportunity to widen access through the provision of Bursaries and, with the perpetuation of such support in mind, it is deemed to be a condition of an award that parents and recipients of Bursaries will not only support the aims and objectives of the School in general, but in particular, support and promote the School's Bursary Awards process and ethos. To this end, it will be an expectation that those who have benefitted from an award will contribute as their means allow to future Bursary campaigns and funding opportunities and that they may be contacted during their final year at Strathallan or as Former Pupils by the School to share their Strathallan experiences and the difference the Bursary made to them so that others may benefit from similar support.



Other Sources of Financial 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. Strathallan School encourages parents/guardians to apply for support where it is felt a good case can be made for assistance. As a School we do not, however, keep a list of Trusts or act as agents of the parents in trying to source such funding and parents will be expected to do their own research in this area.

Further information on how to pursue such assistance may be obtained from:

The Educational Trusts Forum

Website: www.educational-grants.org

Appendices:

- 1. Conditions of a Bursary Award**
- 2. Acceptance Slip**



Conditions of Bursary Award

1. Bursary remission is not guaranteed to continue at the same level each year, but Strathallan endeavours to ensure that bursary remission levels remain as constant as possible, taking into account the changing circumstances of parents and availability of bursary funds. We also cannot guarantee that by making a bursary award to a pupil, we can make a similar award to any sibling of the pupil in the future.
2. **Obligations of the pupil:** Whilst not linked to specific levels of achievement such as with a Scholarship, any Bursary award is based on the understanding that the pupil will by their application, behaviour and involvement in the School community merit such an award on an ongoing basis. Should the pupil's application, behaviour or involvement fall below the standards expected, the School reserves the right to remove the award. 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**.
3. **Obligations of the Parent/s:**
 - a. The parents are expected to support and encourage the pupil 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 the Term. Any extras above £250 to be incurred on behalf of a pupil in receipt of an award for a trip or event should be approved before a commitment is made. Should a bursary pupil be invited or selected to take part in a discretionary trip, tour or pupil exchange that incurs significant expense, the parents are expected to discuss this with the Bursar before applying to, accepting or agreeing to attend the activity, so that the financial aspects can be fully understood and agreed.
 - b. It is an explicit condition of this Bursary award that parents keep such information confidential and do not discuss the nature or level of award with any other parent, past, present or future without the School's express agreement.
 - c. It is a condition of a Bursary award that parents will declare to the School if their financial situation improves during the period they are receiving such support and failure to do so may mean that future support is withdrawn. In addition, should the pupil be awarded any Scholarship post an award of Bursary support, you must understand that the value of the Bursary will reduce by the amount of the Scholarship to reflect the lesser fee you will be asked to pay under means-testing.
 - d. Parents must, when requested to provide an update of their financial situation, fully cooperate and engage with the Bursar's Department in undertaking such a review and ensure that all information requested is submitted in accordance with any deadlines stipulated.
 - e. We do expect any parent(s) who are applying for charitable fee assistance to be doing **all they can** to improve their financial situation, or to explain why it is not possible for them to do so. Charitable fee assistance cannot be awarded or continued if it is assessed as being required to fund a lifestyle that is incompatible with such an award, or it is assessed that the parent(s) could do more to improve their financial situation. Acknowledging that others



might have a different view, the school considers that the following would not be consistent with the ongoing receipt of bursary support:

- frequent or expensive holidays;
- investment in significant *discretionary* home improvements;
- a second property/land holdings from which equity could be realised;
- Any other large discretionary expenditure.

4. **Review of Financial Situation:** Bursary remission of fees is subject to regular review and will be *reassessed at any time* should we believe your financial situation to have changed. As a matter of routine, Bursary Awards are reviewed when a pupil moves from SPS to the Senior School and when moving from 5th Form into Lower 6th. **If noted in the Award Instruction** an annual review of finances will be required to reflect the fact that the parent's financial situation has been assessed as having the potential to change within the course of the forthcoming academic year, and you should expect us to initiate such an annual review. Should a parent's financial situation change significantly from the situation when an award was made, the award may be varied or discontinued.
5. **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 2 and 3 above or 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 will take effect from the start of the following Term.
6. 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.
7. **Fees in lieu of notice:** For the avoidance of doubt, the benefits receivable under an Award will not apply to any Term for which the School has required payment of fees in lieu of notice.
8. **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.
9. **Acknowledgment of and 'Giving Back' in respect of Bursary Support:** Strathallan School celebrates the opportunity to widen access through the provision of Bursaries and, with the perpetuation of such support in mind, it is deemed to be a condition of an award that parents and recipients of Bursaries will not only support the aims and objectives of the School in general, but in particular, support and promote the School's Bursary Awards process and ethos. To this end, it will be an expectation that those who have benefitted from an award will contribute as their means allow to future Bursary campaigns and funding opportunities and that they may be contacted during their final year at Strathallan or as Former Pupils by the School to share their Strathallan experiences and the difference the Bursary made to them so that others may benefit from similar support.



Acceptance Slip

We accept the offer of the award of a Bursary, along with the conditions set out in the Conditions of Award which we have received.

Name of Child Date

Signature of Father / Guardian

Signature of Mother / Guardian

Please note an acceptance slip will be sent out with any offer of bursary support and must be returned for the award to be finalised.

November 2023 Version