



Wakefield Grammar School Foundation

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VALIDITY – Policies should be accessed via FireFly to ensure the current version is used.

CHANGE RECORD - REVIEW PERIOD 2 YEARS

| Version | Date | Change details |
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| V1.04 | Mar 2017 | Updated L Perry |
| V1.05 | July 2019 | Updated L Perry |
| V1.06 | July 2021 | Reviewed L Perry |
| V1.07 | June 2023 | Updated J Cocker, reviewed against ISBA standard |

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WGSF Bursary Policy

1. Aim

The aim of this policy is to provide a framework for the Foundation that enables it to offer financial support in the form of bursaries to able pupils who would otherwise not be able to attend and benefit from the Foundation's schools. It should be read in conjunction with the Foundation's Public Benefit Policy. The object of the Foundation, a charitable company, is given below:

"The object for which the company is established is to advance education by the provision of a school or schools in or near Wakefield or elsewhere in Britain and by ancillary or incidental educational activities and other associated activities for the benefit of the community."

Some bursaries are also known as Foundation Awards at Wakefield Grammar School Foundation.

It should be noted that the majority of the bursarial support available is in the senior sections as Governors believe that supporting pupils through their examination years provides a greater benefit than that for junior section pupils.

2. Qualification for a Bursary

In order to qualify for a bursary, a pupil must meet the academic entrance criteria for the Foundation school being applied for. Details of the entrance criteria are found in the Admission Policy.

It should be noted that qualification for a bursary does not necessarily mean that a pupil will be offered a bursary. When there are more qualifying pupils than there are bursaries available, bursaries for qualifying pupils will be offered based on achievement in the schools' entrance assessments.

Children of Foundation staff or Governors can also apply for a bursary subject to the conditions detailed in the Admissions Policy and the Fee Remission Policy.

Parents are advised that Section 3c of the parental terms and conditions states that *"An award may be withdrawn with immediate effect if, in the opinion of the Head, your child's attendance, progress or behaviour no longer merits the continuation of the award but any such withdrawal of an award will not operate so as to increase the fees in respect of a term which has already commenced."*

3. Access to Bursaries

Any pupil can apply for a bursary and indeed the Foundation welcomes applications from a cross-section of the community. The availability of bursaries and how to apply is clearly noted on the Foundation website (www.wgsf.org.uk), in the school prospectuses and in other Foundation literature which may be handed out at recruitment events at the schools. The information may also be made available through the admissions portal or may be mailed out to prospective parents. In addition it is noted in any advertisements placed in newspapers, magazines, on radio and other media channels.

Parents can also find out information about bursaries and how to apply by calling the schools (WGHS T. 01924 372490 and QEGS T.01924 373943) and/or the Governors' Office directly (T. 01924 231600).

4. Monetary Amount of Bursaries Offered to Pupils

Annually, as part of the budget process, the Governors will identify a sum of money available for bursaries. The Governors will review the guidance published by the Charity Commission to ensure that the bursary provision for the year will satisfy the public benefit requirements made on charities. Further to this the Governors will also consider the financial forecast for the year and the level of reserves to ensure any award of bursaries does not have a significant adverse effect on the Foundation's financial stability.

5. Type of Bursaries Offered

Bursaries are provided to qualifying pupils as a reduction in school fees. The amount awarded varies depending on parental resource. A small number of 100% bursaries are also sometimes available. Occasionally a bursary may be increased, at the discretion of the Head, with an amount from alternate funds.

5.1 Senior Sections at Year 7

Bursaries are most frequently awarded in Year 7 (the first year of senior section). This award is then carried forward through a pupil's time in the senior section until he or she leaves, subject to annual parental net income reviews.

5.2 Senior Section, Year 12 (entry to 6th Form)

Further bursaries are available to pupils entering the 6th Form at both QEGS and WGHS. These are means tested and awards are made on a case by case basis.

5.3 Junior Section and Wakefield Grammar Pre-Preparatory School

Bursaries are not offered to pupils in Junior sections or WGPPS unless there are exceptional circumstances. In this event any bursary offered to pupils in these age groups must be agreed by the Head and the Bursar.

Bursaries made to WGPPS children will automatically cease at the end of Year 2. A new application for a junior section bursary may be made but cannot be guaranteed.

Bursaries made to Junior section pupils will automatically cease at the end of Year 6. A new application for a senior section bursary may be made but can not be guaranteed.

5.4 Other Circumstances

Bursaries may be available to pupils in the Senior Sections in year groups other than year 7 if there are unallocated bursary funds available.

As noted in Section 2 *Qualification for a Bursary* above, a pupil does not automatically qualify for a bursary. All bursaries are subject to funds being available. Typically the Foundation will receive more requests for bursaries from qualifying pupils than there are available and therefore the bursaries are awarded based on performance in the schools'

entrance assessments or examinations. This may mean that a qualifying pupil may not be offered a bursary or may be offered less than he or she would otherwise qualify for.

6. Means Testing

The level of bursary that may be offered to a pupil is dependent on the financial circumstances of the child's parents or legal guardians. The Foundation has agreed cut off levels at which bursarial support may be offered. Prospective parents or legal guardians are required to complete a financial questionnaire and provide documentary evidence to support responses. The Foundation's financial assessment questionnaire is a sector standard document recommended by the Independent Schools Bursars Association. The Foundation effectively assesses after tax household income which will include, where applicable, a notional income based on assets, investments and equity in property and/or a business if relevant. An allowance is given for any other children in full time education. On occasions, parents may be invited to an interview to support an application. On rare occasions a home visit may be undertaken.

As of September 2023 bursaries are available where net household income is below £65,000.

7. Annual Review

Subsequent to the initial award of a bursary, the parents or legal guardians of recipients of awards are required to fill in a financial assessment questionnaire each year and provide documentary evidence that their income is still within the qualifying parameters. Bursaries may be reduced or withdrawn if income levels are no longer within qualifying parameters. Failure to complete the annual questionnaire will also result in the bursary being withdrawn.

8. Other Factors to Consider

Factors that may be taken into consideration when assessing a child for a Foundation Award include:

- Potential earning capacity of the family
- Potential to release equity from property or other investments
- Potential contributions from absent parents

Applicants for Bursary Awards would not generally be expected to have:

- Homes valued at more than £300,000 (*as at September 2023*)
- Frequent or expensive holidays
- Expensive cars or second properties

9. Associated Benefits

The recipients of 100% bursaries may also receive financial assistance with the cost of uniform, travel and essential school trips. Recipients of other bursaries (e.g. 75% reduction off the full fees) may qualify for assistance with uniform, travel and trips depending on their particular individual circumstances.

10. Withdrawal of a bursary

A bursary may be withdrawn or reduced for the following reasons:

- Parental net income increases and no longer meets qualifying criteria
- Failure to submit the annual financial review questionnaire
- Failure to provide adequate supporting information to support an application or review
- if, in the opinion of the Head, your child's attendance, progress or behavior no longer merits the continuation of the award

11. Other Financial Assistance

The Foundation understands that family finances can be adversely impacted by life events. The Foundation has a limited amount of hardship funds that may be accessed in particular circumstances. These funds are intended to provide short term support in response to a significant event and are not intended as an alternative to a bursary.

For further information please contact the Governor's Office wgsfoffice@wgsf.net

12. Confidentiality

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

13. Correspondence and queries

Queries regarding bursaries and correspondence relating to applications or annual reviews should be directed to finance@wgsf.net