



# Wakefield Grammar School Foundation

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**VALIDITY – Policies should be accessed via the Foundation intranet to ensure the current version is used.**

## CHANGE RECORD - REVIEW PERIOD 2 YEARS

<b>Version</b>	<b>Date</b>	<b>Change details</b>
V1.00	Oct 2010	Policy written - L Perry
V1.01	Sept 2012	Updated - L Perry
V1.02	July 2014	Updated - L Perry
V1.03	Aug 2015	Updated - L Perry
V1.04	March 2017	Updated - L Perry
V1.05	July 2019	Updated - L Perry
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V1.07	Feb 2022	Updated - R Guest

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<b>Staff shared</b>	<b>X</b>	<b>School website</b>	<b>X</b>	<b>ISI Portal</b>	
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## WGSF Foundation Award Policy

### 1. Aim

Means tested bursaries are known as Foundation Awards at Wakefield Grammar School Foundation.

The aim of this policy is to provide a framework for the Foundation that enables it to offer financial support 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."*

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

### 2. Qualification for a Foundation Award

In order to qualify for a Foundation Award, a pupil must:

- Meet the academic entrance criteria for the Foundation school being applied for (details of the entrance criteria are found in the individual schools' admissions policies)  
AND
- Show that their family is in financial need.

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

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

Qualification for a Foundation Award is dependent on adherence to the Foundation's Parental Terms & Conditions. Parents are advised that Section 3c of the 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 Foundation Awards**

Any pupil can apply for a Foundation Award and indeed the Foundation welcomes applications from a cross-section of the community. The availability of awards and how to apply is clearly noted on the Foundation website ([www.wgsf.org.uk](http://www.wgsf.org.uk)) and in the school prospectuses. The information may also be requested via the Foundation's online application platform, and will then be emailed to prospective parents. In addition it is noted in any advertisements placed in newspapers, magazines and on radio. Parents can also find out information about Foundation Awards and how to apply by calling the schools and/or the Governors' Office directly.

Bursaries can be applied for by new applicants at Foundation Schools, and existing pupils whose financial circumstances have changed, resulting in difficulty in payment of tuition fees.

### **4. Monetary Amount of Foundation Awards Offered to Pupils**

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

### **5. Type of Awards Offered**

Foundation Awards are typically provided to qualifying pupils as a reduction in school fees of 25%, 37½%, 50%, 62½%, 75% or 100% which is effectively a free place (see below). Occasionally a Foundation Award may be increased, at the discretion of the Head, with an amount from a hardship fund.

#### **5.1 Senior Schools at Year 7**

Each academic year both senior schools provide Foundation Awards in Year 7 (the first year of senior school) using the percentages noted above and up to two totally free places. The number of bursaries awarded is dependent on the monetary factors noted in section 4 above.

Awards are carried forward through a pupil's time at the senior school until he or she leaves. Subsequent to the initial Foundation Award, the parents or legal guardians of recipients of awards are required to complete a financial questionnaire each year and provide documentary evidence that their income is still within the qualifying parameters. If it is not, the award percentage may be reduced or increased, dependent on the availability of additional funding.

If the questionnaire and/or documentary evidence is not provided, the Foundation reserves the right to remove the award until such documentation is provided, without backdating the award on subsequent invoices.

## **5.2 Senior Schools at Year 12 (entry to 6<sup>th</sup> Form)**

Foundation Awards are available to pupils who meet the criteria to enter the 6<sup>th</sup> Form at both QEGS and WGHS from inside and outside the Foundation. These are means tested as above and awards are made on a case by case basis.

## **5.3 Junior Schools (Year 3 to Year 6)**

Both junior schools annually offer the equivalent of 2 places as Foundation Awards for pupils in Years 3-6.

## **5.4 Nursery and Pre-Prep Schools (Reception, Year 1 and Year 2)**

Bursaries are not offered at all to pupils in Nursery and not generally to pupils in the Reception, Year 1 and Year 2 year groups unless there are exceptional circumstances. In this event any Foundation Award offered to pupils in these age groups must be agreed by the Head and the Director of Finance & Operations.

## **5.5 100% Foundation Awards**

One 100% Foundation Award may be awarded to a Year 7 pupil each year at WGHS (the Hepworth Knott Bursary) and QEGS. This is awarded at the Head's discretion and is generally awarded to a pupil who qualifies for a 75% Foundation Award under the Foundation's means testing criteria (see section 6).

## **5.6 Other Circumstances**

If a pupil qualifies for a Foundation Award under the conditions in sections 2 and 6, but there are none available due to the financial restrictions under section 4, the pupil will be put on a waiting list and contacted for a review of their financial position if a Foundation Award becomes available.

If a pupil in receipt of a Foundation Award leaves the school or no longer qualifies, the award can be given to a qualifying pupil, in the same year group or above, from the waiting list.

As noted in Section 2 headed *Qualification for a Foundation Award* above, all Foundation Awards are subject to funds being available. Typically the Foundation will receive more requests for awards from qualifying pupils than there are available and therefore awards are made based on performance in the schools' entrance assessments or examinations. This may mean that a qualifying pupil is not offered a Foundation Award or may be offered less than he or she would otherwise qualify for.

## **6. Means Testing**

The level of Foundation Award 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 support may be offered. Prospective parents or legal guardians are required to complete a financial questionnaire detailing all assets, income and specific outgoings including payroll deductions for tax and national insurance along with mortgage interest. Full details are available on the questionnaire. All applicants must be available to discuss their questionnaire with a Foundation Finance

Administrator. 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. As of September 2021 bursaries were available where net household income was below £50,000.

## **7. Other Factors to Consider**

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

- Potential earning capacity of the family.
- Potential to release equity from property or other investments.
- Potential contributions from non-resident parents and other relatives/friends to both school fees and household costs.
- Applicants for Foundation Awards would not generally be expected to have: homes valued at more than £300,000 (*as at September 2021*), expensive cars, second properties.
- Where lifestyle is deemed to indicate that income levels are higher than those declared, further evidence of income may be requested and an award will be given at the discretion of the Director of Finance & Operations.

The Foundation reserves the right to review qualification at any time, for example if information indicates that a family does not meet the qualification criteria. In this situation the Foundation may seek to recover any funds previously awarded.

## **8. Additional Financial Support**

The recipients of the free places 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. A pupil's parents can contact the Governors' Office to discuss their circumstances if they wish to be considered for this assistance.

Assistance with the cost of educational visits may be available to pupils in receipt of Foundation Awards. Individual circumstances and the nature of the trip will be assessed by the Head on a case by case basis.

Each school has an annual Hardship Fund which can be used to provide short term financial support in exceptional circumstances. This support is provided at the Head teacher's discretion and is generally provided to pupils in significant academic year groups (Years 11 and 13) or those with pastoral needs.

## **9. Foundation Award Decisions**

Decisions regarding Foundation Awards for Years 7 will be communicated to applicants in the spring term, shortly after the entrance examination. Other decisions will be communicated in a timely manner following review of the financial questionnaire.

The Foundation's decisions on awards are final; there is no appeals procedure as it is the responsibility of applicants to provide true, full and accurate information during the application process.

**10. Confidentiality**

The Foundation respects the confidentiality of Foundation Awards made to families and recipients are expected to do likewise