



**MAGDALEN COLLEGE SCHOOL
OXFORD**

FINANCIAL ASSISTANCE WITH FEES

**MAGDALEN COLLEGE SCHOOL BURSARY AND
FINANCIAL HARDSHIP SCHEMES**

September 2019

Introduction

1. The Governors of Magdalen College School, Oxford (MCS) are committed to ensuring that pupils who would benefit from an education at MCS are not excluded from entering or remaining at the School for financial reasons and therefore provide two forms of financial support: a) a ‘bursary’ available to parents¹ of new pupils, and b) a ‘hardship award’ available to parents¹ of existing pupils not already or previously in receipt of a bursary award.
 - a) The Governors offer financial support towards the payment of school fees to eligible parents of new pupils offered a place at the School. Such support is known as a bursary. Most bursary awards are from the “School Governors’ Bursary Scheme” but some awards are funded by separately named trusts controlled by the School (see Section 7 below). Parents must apply annually for renewal of a bursary award to confirm their eligibility to continue to receive an award.
 - b) A hardship award may be made available to a pupil already in the School whose ability to pay has declined significantly due to unforeseen circumstances. The School cannot guarantee to provide financial support. Such awards are granted for a short period only and priority will be given to pupils in the GCSE or final A-level years. In exceptional circumstances where parents wish to extend the award for a further year, then it will be necessary to reapply.

The assessment for both types of award follow a similar process and parents are required to complete a means testing form in either instance.

2. A bursary is usually awarded in the form of a discount on tuition fees payable. The amount of the bursary awarded is dependent on the financial and other personal circumstances of the applicants. The maximum amount of bursary that may be awarded is 100% of tuition fees (but see section 8 below).
3. The School has charitable status and the Governors wish to ensure that the limited pool of available funds is used prudently to support parents who otherwise would not be able to send their son or daughter to the School. Whilst every effort will be made to provide support, there are limits on the resources available to provide such help. The number of awards made is dependent on the funds that are available at the time. There should be no expectation that assistance with tuition fees will be forthcoming on an automatic basis.
4. Parents of **new** pupils entering the School from 11+ to 16+, who are of limited financial means, can apply for a bursary award. Bursaries are not offered to pupils on admission to the Junior School or to current pupils attending the School unless they are moving up to Senior School from Junior School (see section 9 below). To determine eligibility, the assessment process involves means testing of the family circumstances and applicants are required to complete a means testing form, which should be returned with the support documentation by the deadline specified in Section 12 below. If eligible, the award will only be granted if the pupil has satisfied the academic criteria for admission to the School.
5. The bursary award is subject to annual means testing to assess continued eligibility. Also the award may be varied upwards or downwards, depending on circumstances. Bursary holders will be issued with repeat means testing forms for return with the support documentation by the deadline specified in Section 12 below.
6. For both bursary and hardship awards, in assessing the means of parents, factors that may be taken into account include investments and realisable assets, savings, ownership of property (including the

¹ Please note, in the context of this document “parents” refers to, “parents, guardians or carers”.

family home), size of family, number of dependent persons and other similar factors. Family income is also taken into account. All sources of income (employment, business, investment, rental, contributions from the wider family and third parties, etc.) are taken into consideration. Details of the parents' outgoings and capital liabilities are also required to provide a comprehensive picture of the financial circumstances of the family. A home visit from a representative of the School may be made to review your financial circumstances as part of the initial assessment or during subsequent reassessments. A consent form is included with the means testing form and applicants are required to complete and sign the declaration and return it with the completed means testing form and requisite supporting documentation.

7. For the most part, awards of bursaries are described as "Governors' Bursaries". A small number of bursaries are supported from specifically designated funds, and awards of these bursaries bear the name of the relevant fund or the name of the donor with their consent.
8. **Consideration** will be given to those awarded a full fee bursary receiving a grant towards certain "extras" which are directly related to attendance at MCS (see Annex A).
9. Parents of pupils moving from Junior School to Senior School can also apply for a bursary award if they are of limited financial means. As for new pupils applying for a bursary award, the application process requires the family's circumstances to be means tested and if eligible for an award, the pupil must have satisfied the academic criteria for entry into the Senior School for the award to be granted. Parents of a pupil who is already in the Senior School or the Sixth Form can apply through the hardship award scheme.

Criteria for making an award

10. The School does not have inexhaustible funds for granting bursaries and hardship awards and the Governors will try consistently to apply the following criteria in making both types of award.

- i. **Academic ability:**

The decision to award a bursary or hardship award, and the amount of the bursary or hardship award, is not influenced by the level of the academic ability of the pupil but by the extent of the financial need. That said, a bursary will not be given to any pupil who has not met the academic standard required for admission to the School. Each pupil to whom support is offered must, in the opinion of the Master, be likely to make sound academic progress following admission and possess the potential to develop the quality of their work, and benefit from participation in the wider, extra-curricular activities on offer at the School.

- ii. **Financial Limitations:**

Each case is assessed on its own merits and awards are made accordingly, subject to the School's ability to fund these within the context of its overall budget.

The principal measures of eligibility for a bursary or financial hardship award are:

- family assets
- family income

The School uses a sliding scale to relate bursary or hardship awards to these two criteria.

The School recognises that judgements about what sacrifices a family should make to pay school fees will be personal. However, the School has a duty to ensure that all bursary and hardship

awards are properly focused on cases of greatest need. Therefore the following factors are taken into consideration:

- **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 property and land holdings;
- **In cases of separation, the contribution made by the absent parent** (see also Section 11 below);
- **Contribution to household costs by other members of the wider family, by other adults unrelated to the child, or by outside sources;**
- **Where siblings are at other fee paying schools or places of education,** it would be expected that those organisations were offering bursaries of a similar value to that being offered by MCS;
- **The ability to improve the financial position or earning power of the 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 subject to the wider family context.

This list is indicative but is not exhaustive.

MCS considers that the following would not be consistent with the receipt of a bursary or hardship award:

- Frequent and/or expensive holidays;
- New or luxury cars;
- Investment in significant home improvements;
- A second property or land holdings.

This list is indicative but is not exhaustive.

iii. Other Factors:

MCS recognises that in making decisions about bursary or hardship awards there may be other circumstances which should be considered. The following examples are indicative but not exhaustive:

- Where an applicant has siblings at the School.
- Where the social needs of the child are relevant.
- Where a parent is terminally ill or is unable to secure permanent employment due to poor health.

Separated Parents

11. i. MCS recognises that family separation can be a painful process for all members of a family and may be particularly stressful for children. The School values the quality of its pastoral care and does not wish to increase the pressure that pupils may suffer as a consequence of parental separation or divorce. At the same time, the School reminds parents of the commitment (which in most cases will be a joint commitment) that they have made to pay School fees and expects that joint commitment to be honoured in the event of separation or divorce. It should be noted that both parents have entered into a legally binding contact with the School which imposes an obligation on both parents to pay the fees, so in the event that one parent does not pay their part, the other parent will be liable for the School fees in their

entirety. So separation or divorce is not of itself likely to be sufficient to prompt the award of a bursary or financial hardship award.

- ii. The School recognises that the financial arrangements of and between parents who live separately can be complex. However, in general, the financial circumstances of **both** parents of an applicant will be assessed, and both assessments will inform the decision as to whether or not an award will be made.
- iii. If either of an applicant's parents are absent, the School will decide to what extent the absent parent's financial circumstances should be assessed. Both parents will be assessed unless there is sufficient evidence that it would not be reasonable to do so. The School will be guided by any existing Court Orders or other legal arrangements pertaining to this.
- iv. In all situations, the financial information collected from each parent will be kept confidential and will not be disclosed to the second parent without explicit consent.

The Application and Reapplication Process

12. i. New Application Process for Bursary Awards

Parents of new pupils should confirm they wish to apply for a bursary by the deadline for registering their son or daughter for a place at the School, usually 31st October each year prior to entry. Parents seeking a bursary are required to complete a means testing form in support of their application, to establish the financial circumstances of the household. This form will be sent to applicants if the "bursaries information" box has been ticked on the registration form. The means testing form is also available to download from the MCS website. Details of income, assets, outgoings and liabilities requested on the form, must be accompanied by full documentary evidence. The deadline for the return of the means testing form and documentation is 30th November for 11+ to 14+ applicants and 14th November for 16+ applicants. To note, pre-test applicants will be required to submit an application by 30th November prior to the year of the pre-test to make a provisional assessment and again by 30th November prior to the year of entry, with updated information and documentation, to undergo a final assessment. It should be noted that if parents do not return the form and documents by the November deadline, they are unlikely to be considered for an award, as the School cannot reserve funds for award at a later stage.

Reapplication Process for Bursary Awards

Parents who are already in receipt of bursaries and who wish to have that bursary renewed for a future year, must apply annually for renewal of the bursary in the preceding year and return their application with the support documentation by the deadline specified in Section 13 below). Similarly if this deadline is missed, it is unlikely that the bursary reapplication will be considered.

- ii. All bursary and hardship applications will be assessed by the Bursar supported by the Senior Team, in order to establish the likely level of support required to enable the pupil to attend the School. It should be noted that the assessment may involve a representative of the School visiting the parents' home to ensure that the information has been correctly interpreted and that the basis of the financial assessment has been fair. The School will notify the parents if a home visit is required. It is important that the consent form in Annex B of the means testing form is signed and returned with the means testing form.

The following applies to bursary award applicants only.

- iii. The School will endeavour to advise applicants of the **likely** outcome of their application for bursary as early as possible and ideally before the pupil sits the entrance exam. However the School will not be able to confirm the outcome of a bursary application until after all decisions on admission to the School have been made and the demand for bursaries is known. Notification of the likely outcome of a bursary application must be regarded as a provisional indication of a bursary award only, and is not binding on the School. Also, it is not an indication that the child is to be offered a place in the School.
- iv. Once the School has assessed the pupil's academic suitability for entry into the School and the decisions on admissions have been made, the parents will be advised whether their child is to be offered a place at the School, whether or not a bursary will be available and confirmation of the likely amount of that bursary to be awarded, should the parents accept the offer of a place for their son/daughter at MCS.
- v. Parents are required to sign the Acceptance Form in order to accept the place at the School and be bound by the School's standard Terms and Conditions. This form provides information as to who will be taking responsibility for the payment of fees and other sums to the School. Separately parents are required to sign a Bursary Acceptance Form agreeing to any conditions relating to the bursary and return it by the deadline specified in the accompanying letter confirming the amount of the bursary award. Acceptance of this form may be given by signature in writing, scanned copy signature, electronic signature (e.g. email) or other form as may be accepted by the School. The offer is time limited and a delay in returning the acceptance form could result in the offer being rescinded. See Annex C for an example of the acceptance form. Please note, you are not required to complete and return this form with your initial or renewing application.
- vi. The standard level of deposit required to secure a place in the Senior School is £1,000. Parents awarded a bursary are required to provide a deposit reduced by the level of the bursary award, with a minimum deposit payable of £100. (For example, a pupil awarded a 60% bursary would pay a deposit of £400; those receiving a bursary worth in excess of 80% of fees will pay £200 and those awarded a full bursary will pay £100.) To note, the deposit is offset against the final bill sent to the parents after the pupil has left the School.

13. Annual Review Process for Bursary Awards

- i. All bursary awards are subject to repeat testing of means each year to determine continued eligibility, and can be varied upwards or downwards depending on circumstances. Bursary holders will be issued with means-testing forms for repeat assessment during December (preceding the academic year in question) for return by 31st January. The process of reassessment may include a home visit.
- ii. For those previously in receipt of bursaries, the level of bursary offered in subsequent years may be increased or reduced, dependant on changes in the family's financial circumstances or the circumstances of the School. Additionally the School has the discretion to reduce or withdraw an award where:
 - a pupil's progress, attitude or behaviour has been unsatisfactory;

- the parents have failed to support the School, for example: late payment by the parents of their share of the fees or other monies due to the School; or other failure to comply with the behaviour expected by the School, described in Annex B;
- the family's financial circumstances no longer qualify them for eligibility to receive continued financial assistance;
- the parents have not returned the means testing form and support documentation by the required deadline or returned the bursary acceptance form by the deadline specified in the accompanying letter.

14. Confidentiality

The School respects the confidentiality of bursary and hardship awards made to families. Parents are expected to do likewise and are not expected to disclose to others the details of the bursary or financial hardship award they have been granted. A breach of confidentiality may result in the termination of the bursary or financial hardship award. Under the terms of the General Data Protection Regulation 2016/679 and the Data Protection Act 2018, the School is the Data Controller and information submitted in connection with an application for financial support will be processed lawfully and fairly in accordance with this legislation and the School's Privacy Notice.

15. Terms and Conditions for Bursary and Financial Hardship Awards

The terms and conditions are detailed in Annex B. If parents wish to accept the offer of a bursary or financial hardship award they will be required to sign a copy of the Bursary or Financial Hardship Acceptance Form confirming this and to confirm that they will abide by these terms and conditions. An example of the acceptance form is given in Annex C.

16. 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 some instances, these are intended to assist children who are already attending a fee-paying school and, due to a change of circumstances, may be unable to remain.
- MCS 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:

Educational Grants Advice Service, Independent Schools Council (ISC)

Website: www.isc.co.uk/schools/information-for-parents

Royal National Children's SpringBoard Foundation

Website: www.royalspringboard.org.uk

Educational Trusts' Forum

Website: www.educational-grants.org

Ewelme Exhibition Endowment

Website: www.ewelme-education-awards.info

The Ouseley Church Music Trust

Website: www.ouseleytrust.org.uk

ANNEX A to 'Financial Assistance with Fees'

Financial Assistance with Extras for Bursary Awards

Grants towards the following extras, which are directly related to attendance at MCS, will be considered for those awarded a full fee bursary receiving a grant:

- school lunches;
- field trips which are part of the curriculum;
- public examination entry fees;

School Lunches

If the pupil is on a full fee bursary the School will meet 100% of the cost of school lunches; however, items purchased at breakfast or morning break will be charged to the pupil's account.

Field Trips which are part of the Curriculum

Throughout their time at the School pupils will be expected to attend various field trips which are an essential part of the curriculum for that subject.

For those on a full fee bursary a grant of not more than 50% of the cost will be made to cover the expenses of any travel and accommodation required as a result of the trip. The Head of Department will advise whether a trip is a requirement of the curriculum.

Public Examination Entry Fees

The fees for public examinations, which are part of the School curriculum, will be met by the School, providing the pupil is on a full fee bursary.

The cost of any examination for which a pupil enters but which is not part of the School curriculum will be debited to the pupil's account.

ANNEX B to ‘Financial Assistance with Fees’

Terms and Conditions for Bursary and Financial Hardship Awards

1. Award of a Bursary or Financial Hardship Support

A bursary or financial hardship support is awarded at the sole discretion of Magdalen College School, Oxford.

2. Annual Review

All means-tested awards are subject to annual review and parents shall each year be required to complete a financial means questionnaire. After any annual review, the School reserves the right to vary the value of the bursary with immediate effect. This can range from 0% to 100% and the School will confirm the new value in writing to the parents. Exceptionally there may be consideration to extend a financial hardship award for a further year and if so, it is subject to the same review process as a bursary award.

3. Withdrawal of the Bursary or Financial Hardship Support

A bursary or hardship award may be withdrawn by written notice sent to the parents from the School. In this event, parents will become liable for the School fees in full for the entire year in respect of which the notice is given. In particular it should be noted that failure to comply with the School’s standard terms and conditions, including the prompt payment of monies owed to the School, may lead to withdrawal of bursary or hardship support, and attention is drawn to Section 11 in ‘Financial Assistance with Fees: Magdalen College School Bursary and Financial Hardship Schemes’ regarding the joint commitment of parents to meet financial obligations to the School. If the School is considering withdrawing bursary or financial hardship support it will, save in exceptional circumstances, give 4 weeks’ notice of its intention to do so to the relevant parties. In exceptional circumstances, such as fraud or material breach of the standard Terms and Conditions, without prejudice to the School’s contractual common law and other rights, withdrawal of bursary or financial hardship support will be immediate.

4. Repayment of the Bursary or Financial Hardship Support

The parents will be required to repay all or part of the bursary or financial hardship support if it is terminated in the following circumstances:

- a. if the parents knowingly or recklessly provided false or inaccurate information about their financial position;
- b. if the pupil has been found to have committed a serious breach, or series of persistent minor breaches, of discipline for which the sanction would normally be expulsion or required removal.

ANNEX C to 'Financial Assistance with Fees'
Example of Bursary/ Financial Hardship Acceptance Form



Magdalen College School, Oxford

**BURSARY / FINANCIAL HARDSHIP ACCEPTANCE
FORM**

**Please return this form to the Bursar's Office:
Bursar, Magdalen College School, Oxford, OX4 1DZ**

I / We accept the offer of a bursary / financial hardship support as set out in the letter from the Bursar dated

I / We agree to abide by the Terms and Conditions for a Bursary / Financial Hardship Award stated in Annex B of the 'Financial Assistance with Fees: Magdalen College School Bursary and Financial Hardship Schemes'.

Name of pupil

Signature of Parent/Guardian/Carer

Name of Parent /Guardian / Carer

Relationship to pupil

Date

Signature of Parent/Guardian/Carer

Name of Parent /Guardian / Carer

Relationship to pupil

Date