Bursary Policy
September 2026

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Signed: 	Steve Honeywood, Chair of Governors 1/9/26

South Lee Prep School
Bury St Edmunds

1. Introduction

The Governors (Trustees) of South Lee School have produced this policy in furtherance of the School's desire to allow parents who cannot fully pay for the tuition fees in order to access to the School's excellent education. This policy is to advise and help prospective and existing parents when applying for a bursary.

This policy applies only to pupils who are prospective pupils or existing pupils from Reception and not in receipt of Early Year Funding.

2. Financial Awards

This policy is designed to help both existing and prospective parents. It covers both:

- Admission support for the parents of new pupils who, for financial reasons, are otherwise unable to afford the tuition fees and send their child to our school.
- Hardship support for existing parents who find that their financial circumstances have worsened to the extent that they are unable to continue to send their child to South Lee School without financial aid.

The value of support awarded may be up to 100% of tuition fees. In exceptional circumstances, additional assistance may be provided to help parents with non-fee costs (i.e. food and academic costs). Financial resources are limited and therefore not all eligible applications will be successful.

3. Eligibility and procedure for application

Bursaries are entirely means-tested and are awarded on an annual basis to parents who satisfy the financial criteria set by South Lee School from time to time, in relation to their income, savings and capital assets.

South Lee School works in partnership with BAA (Bursary Assessment Associates), an independent company responsible for assessing bursary applications on behalf of the school.

Parents wishing to apply for financial assistance should initially contact the School's Finance Manager, who will provide a letter containing the relevant links and guidance on how to submit an application to BAA, together with details of the financial information and supporting documentation required.

All bursary applications must be submitted directly to BAA using the application process outlined in the information provided. BAA will undertake an assessment of the family's financial circumstances and provide the assessment to South Lee School for consideration.

It is important that parents complete the application fully and accurately and provide all requested supporting information to ensure that a fair and thorough assessment can be undertaken.

Once a completed application has been received and assessed, parents should normally expect to receive a response from South Lee School within 4–6 weeks. The school will communicate the outcome of the application directly to the parents.

All applications for Admission Support must be made before entry to South Lee School.

4. Procedure for determining awards

Admission Support

Applications for Admission Support will be considered as soon as reasonably practical following receipt of the completed assessment from BAA. Applicants are encouraged to begin the application process between September and December in the year prior to entry. Applications received outside this period will still be considered but may not be successful if the bursary allocation for that academic year has already been awarded.

Following receipt and consideration of BAA's assessment, the Head and Finance Manager will determine the level of financial assistance to be offered, taking into account the family's financial circumstances and the School's available bursary funds.

Successful applicants will be sent a letter of offer as soon as reasonably practical after the prospective pupil has attended their Taster Day. The letter will specify the conditions of the award and require parents to complete and sign an Acceptance Form.

Hardship Support

Applications for Hardship Support will be considered as soon as reasonably practical following notification to the Finance Manager of a change in the parents' financial circumstances and receipt of the completed assessment from BAA.

The Head and Finance Manager will consider the assessment and determine whether financial assistance can be offered, taking into account the family's circumstances and the School's available bursary funds.

All financial assistance is discretionary and subject to review on an annual basis, with some Hardship Support awards potentially reviewed over a shorter period.

Should the financial information declared in the application become inaccurate due to either a worsening or improvement in the family's financial circumstances, parents must contact the Head or Finance Manager as soon as possible so that an appropriate way forward can be agreed.

Failure to inform the Head or Finance Manager of a change in financial circumstances could lead to financial assistance being withdrawn and, in some cases, parents being requested to refund part or all of an award.

South Lee School reserves the right to review financial support at any time and will review all awards at least annually.

5. Financial Assistance with non-tuition costs in cases of hardship

Parents awarded an Admission Support and/or a Hardship Support may at the same time also be offered additional assistance with non-tuition costs associated with their child's education including Food and Academic costs. These awards will be subject to review at the same time as the bursary is reviewed.

6. Confidentiality

All bursary applications are treated in the strictest confidence. Pupils will not be made aware that they benefit from financial support unless informed by their parents. Any bursary must remain confidential and must not be communicated to a third party. To do so could lead to the withdrawal of financial support.

7. Data Protection

All information provided by parents in connection with an application for a Bursary will be processed in accordance with data protection principles as set out in the Data Protection Act 2018. Data will be processed only for the purposes of considering applications for Bursaries and determining the success of such applications. The information provided will not be used for any other purpose.

Procedure for the award of Bursaries

1. Prospective parents enquire about a place at South Lee School for their child.

2. Prospective parents are sent a prospectus, current fees and registration form. The availability of bursaries may be discussed at this time.

3. Prospective parents complete the registration form and return it to the Admissions Officer at South Lee School, together with the registration fee.

4. Parents wishing to apply for a bursary contact the Finance Manager, who will provide a letter containing the links and guidance required to submit an application directly to BAA (Bursary Assessment Associates). The letter will explain the application process and outline the financial information and supporting documentation required. Parents are responsible for submitting their completed application and supporting information directly to BAA.

5. A child attends school for a Taster Day, organised through the Admissions Officer.

6. BAA undertakes an assessment of the family's financial circumstances and provides its findings to South Lee School. Following consideration of the assessment, the Head and Finance Manager decide on the bursary award. If the award is to be over 50%, the Governors' Committee for Finance will be involved in the final decision, in discussion with the Head and Finance Manager.

7. Once a decision has been made, South Lee School will communicate the outcome directly to the parents, normally within 4–6 weeks of receipt of the completed application. A letter of offer, including details of any financial support awarded and the conditions attached, will be sent to successful applicants.

8. Parents accept the offer of a place and financial support. The Acceptance Form must be signed and returned with the deposit to the Admissions Officer. The Financial Circumstances Acceptance Form must be signed by both parents and returned to the Finance Manager.

Appendix A

Conditions of Bursary Award

1. **Obligations of the pupil:** 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. The pupil must adhere to the School's required standards of conduct and progress.

2. **Obligations of the Parents / Guardians:** The parents are expected to support and encourage the pupil, treat members of the School community reasonably and comply with the School's standard terms and conditions. The parents/guardians are also required to pay the balance of the account by the first day of each term.

3. **Annual Review**: Other than an Emergency Bursary when the period is likely to be shorter, an award is normally tenable throughout a pupil's time at the School. It is, however, subject to an annual review of financial circumstances and should these change significantly from the present position, the Award may be varied or discontinued.

4. **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/guardian has not complied with the obligations set out in paragraphs 1, 2 and 3 above or the pupil has fallen below the required standards of conduct and progress and in the further opinion of the Governor's 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 payment term.

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.

5. **Repayment events:** Parents/guardians shall be required forthwith upon written notice to repay all or part of the benefits they have received under the Award in any of the following circumstances:

- Up to three payment terms benefits (if received) if the pupil has engaged in serious misconduct or has been expelled or removed for reasons of misconduct by the requirement of the Head acting in good faith;

- Up to three payment terms benefits (if received) in a case of the pupil being withdrawn for any reason during a school year without a term's written notice having been given;

- If the parents/guardians have failed to inform the Business Manager of any change in their financial circumstances within a reasonable time of such change occurring.

6. **Fees in lieu of notice:** For the avoidance of doubt, the benefits receivable under an Award will not apply to any payment term for which the School has required payment of fees in lieu of notice.

7. **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. Individuals may receive bursary support for a maximum of seven years.