



KING EDWARD'S SCHOOL
BIRMINGHAM



KING EDWARD VI
HIGH SCHOOL FOR GIRLS

ASSISTED PLACES POLICY

Introduction

- 1) This policy has been authorised by the Governors of the Foundation in furtherance of the Charity's public benefit policy.
- 2) This policy contains an overview of the Assisted Places Scheme currently in operation at King Edward's School and King Edward VI High School for Girls, and provides details of the procedure for applications to and awards made under the Scheme. It contains ancillary documents, including Conditions of Award, Scale of Fees and the Means-testing Forms.
- 3) The Schools are committed to providing a first class education to talented boys and girls from a broad social and financial background by offering eligible parents/ guardians means-tested financial support with the payment of School fees. Such support is known as an Assisted Place and may be awarded in the form of a discount of up to 100% on fees payable.
- 4) An Assisted Place is distinct from a scholarship. Both reward outstanding achievement in academic work or music, however an Assisted Place is a means-tested award and a scholarship is not.
- 5) An applicant can be awarded both an Assisted Place and a scholarship but, together, they will not exceed 100% of fees payable.
- 6) Due to the limited financial resources of the School, not every eligible application for an Assisted Place will be successful. Places are awarded on the basis of academic merit. Where a pupil has not been successful in securing funding, but has performed well enough in the Entrance Examination to secure a full fee place, parents may be offered a full fee place following an Affordability Interview with the Bursar.

Terminology

- 7) School: means either King Edward's School or King Edward VI High School for Girls as now or in the future constituted (and any successor). The Schools form part of The Schools of King Edward VI in Birmingham (Foundation) which is a registered charity.
- 8) Head teacher: means either the Chief Master of King Edward's School or the Principal of King Edward VI High School for Girls.
- 9) Foundation Board: means the Trustees of The Schools of King Edward VI in Birmingham.

- 10) **Governors:** means the Governors of the Independent School' Governing Body which is a sub-committee made up of the Trustees of the Foundation Board of together with other non-Trustee Governors.
- 11) **Executive Director:** means the Executive Director of 'The Schools of King Edward VI in Birmingham'.
- 12) **Free Assisted Place:** means an award of an Assisted Place for 100% of the school fees, meaning the parents do not need to pay.
- 13) **West Midlands area:** means the West Midlands county and the surrounding counties of Warwickshire, Worcestershire, Herefordshire, Staffordshire and Shropshire that make up the West Midlands Region.

Eligibility

- 14) Assisted Places at the School are available to applicants who have been on the school roll or formally home-schooled in the West Midlands area for at least 12 months at the time of application.
- 15) Places are awarded based on performance in the entrance exam, school reports and interview, subject to the School's ability to fund these within the context of the funds available.
- 16) A published Scale of Fees is used to determine the value of the award with reference to a family's Relevant Income. Relevant Income is based mainly on combination of Gross Income and Gross Assets and is calculated by the Means-testing Form. As a guide, the upper limit for total parental relevant income is currently set at £72,000 and the upper limit for Gross Assets is £500,000. These limits will be reviewed annually taking into account changes in CPI.
- 17) It is recognised that judgements about what sacrifices a family should make to pay School fees will be personal. However, the School have a duty to ensure that its limited charitable resources are directed towards the most deserving cases and for this reason an Assisted Place is not intended to support families that, with reasonable financial and personal sacrifices, could have otherwise afforded paying the full fee.

Family finances with the following characteristics would not normally be considered eligible for an Assisted Place:

- opportunities to release capital. Significant capital savings, retained profits in a business and investments would be expected to be used for the payment of School fees, as would equity value in houses;
 - proven ability to borrow, where families have been able to secure additional mortgages on buy-to-let properties;
 - in cases of separation, any significant contributions made by the absent parent; and
 - contributions to household costs and school fees by other, wider family members, any adults unrelated to the child or by outside sources; and
 - other indicators of wealth, for example:
 - Frequent or expensive holidays
 - New or luxury cars
 - Investment in significant home improvements
 - A second property/land holdings
- 18) In cases where a pupil is deemed to be ineligible for the scheme for the reasons listed in 17) above, this will be presented to the Executive Director for authorisation.

Terms of Assisted Place provision

General

- 19) The School reserve the right to make or alter its overall Assisted Place scheme from time to time in the light of its changing financial or other circumstances.
- 20) Any terms on which an Assisted Place is made to an individual will be set out as part of the offer of a place and will generally continue for the child's duration at the School subject to annual review (see below). Changes in the application of the scheme to individuals already at the School will be at the discretion of the Head Teacher.
- 21) Assisted Places awards are expressed as a fee payable which is based on the 'Scale of Fees' charged. The Scale of Fees is updated annually to reflect any increases in Tuition Fee approved by Governors.
- 22) Assisted Places awards are reviewed annually (see below) to take account of changes in parental circumstances, and where parents' circumstances have improved, the level of Assisted Place will fall and where parents' circumstances have worsened, the level of Assisted Place may be increased.
- 23) The Head Teacher's decision is final in awarding an Assisted Place. The Executive Director's decision is final in determining eligibility for the scheme and in assessing fees payable.

Supplementary charges

- 24) Assisted Place awards apply to tuition fees only. Supplementary charges must be paid in accordance with the terms and conditions of the School. There are grants available for travel and uniform for parents eligible for a Free Assisted Place. The Scheme also provides funding for field trips where participation is mandatory to complete public examinations.
- 25) School meals are provided to all pupils on Free Assisted Places in Year 7 as all pupils are required to take school lunch in their first year. From Year 8 onwards, school meals are optional and so fees for school meals must be paid by the parents, unless the parents qualify for Free School Meals.

Confidentiality

- 26) The School respects the confidentiality of Assisted Place awards to families and recipients are expected to do likewise.

Applications

- 27) Applications for financial support fall into two categories: new applicants and existing awards which are reassessed on an annual basis.

New applicants

- 28) Means-tested Assisted Places are usually only available for new applicants at 11+ and 16+ at the School, All awards are conditional on:
 - full disclosure of information requested within the timescales given. A considerable amount of personal information will be required as well as documentary evidence (this may include pay slips, P60, HMRC self-assessment documents, pension income proof, share dividend vouchers and bank interest, proof of residence including council tax bills etc.);
 - the School satisfying itself that the information given is accurate. The School may seek objective third-party confirmation of a family's financial circumstances (including from a credit reference agency); and
 - a home visit from the School or its agents if the School deems this appropriate.

- 29) The School will not proceed with an application from anyone giving misleading, inaccurate or incomplete information

Existing Awards - Annual reassessment

- 30) Once awarded, the Assisted Place (as defined in the offer) normally applies for the duration of a pupil's School career. However, each Assisted Place holder will be issued with repeat means-testing forms at the beginning of April each year for return by the date indicated on the Assisted Place form. The same conditions apply as above. Continuation of the Assisted Place is conditional upon:
- full disclosure of information requested within the timescales given;
 - the School satisfying itself that the information given is accurate. The School may seek objective third-party confirmation of a family's financial circumstances (including from a credit reference agency); and
 - a home visit from the School or its agents if the School deems this appropriate.
- 31) The School reserves the right to withdraw an Assisted Place from anyone giving misleading, inaccurate or incomplete information.
- 32) In addition, the Head Teacher also has the discretion to recommend 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 have failed to make timely payments of any contribution they are making to fees or extras.

The Application Process at 11+

- 33) If an applicant wishes to apply for an Assisted Place the following steps need to be followed:
- a) Parents need to register for a place at the School by filling in the appropriate form and sending the registration fee to the School (see the Admissions policy for more detail). On the registration form, parents should indicate interest in an Assisted Place.
 - b) The School will send out an Assisted Place Application Form (Form 1) which seeks outline financial information. No supporting financial documentation is required at this stage.
 - c) If the applicant is successful in their application and is offered a place at the School, parents will be asked to fill in a more detailed financial declaration (Form 2) for the tax year then current. At this stage copies of documents are required to support the application. This will allow the School to confirm the fees payable for the year of entry prior to the deadline for acceptance.
 - d) If Parent choose to accept the place based on the confirmed fee, they are then required to sign a contract with the School. This includes the requirement for an annual review of their financial circumstances (see above). The contract will also acknowledge agreement to any conditions relating to the Assisted Place.
- 34) Forms and supporting documents should always be returned by the due dates given as delayed Assisted Place applications cannot be processed and you may then potentially forfeit an Assisted Place – Assisted Place places at the School are highly competitive.

The Application Process at 16+

- 35) The application process is the same as a 11+, however given the conditional nature of the place, the review of the detailed financial declaration (Form 2) will occur once the place becomes unconditional.

Existing pupils: hardship Assisted Places

- 36) These may be offered to parents of existing pupils where a catastrophic change in financial or personal circumstances has created a difficulty in paying the fees. If funds are available and the pupil would have been offered an Assisted Place on entry, then the pupil may be admitted to the Assisted Places scheme and treated as a new applicant. If this is not the case, financial help may be offered in the form of a short term award. Such awards are subject to availability of funding, cannot be guaranteed and are means tested. Hardship funding will be awarded on a temporary basis and will not be guaranteed for the remainder of the

pupil's education at the School. As soon as the situation has arisen, the Fees Manager needs to be informed so that consideration can be given to a request in consultation with the School.

Sources of Funding

37) Assisted Places are funded from three sources:

- Grants awarded by the Foundation Board
- Grants awarded by the Trustees of the King Edward's School, Birmingham Trust (for boys)
- Grants awarded by the Trustees of the King Edward VI High School for Girls Trust (for girls)

38) From time to time, a sponsor donor may decide to fund a pupil through the school. In these circumstances, parents will be contacted to seek consent to this prior to the pupil being matched to the gift. The amount of the grant paid by the Trust is determined by the means testing process described in paragraphs 15 to 19 and the remainder of the fees (if any) are to be paid by the Parents.

This policy is recommended by the Independent Schools' Governing Body, ratified by the Foundation Board and reported to the Trustees of the King Edward's School, Birmingham Trust and the Trustees of the King Edward VI High School for Girls Trust.

This policy will be held on the Schools, Foundation and Trust websites.

Approved by Independent Schools' Governing Body
March 2017

Assisted place: Conditions of Award

- 1 **Grant of the award:** An award is granted at the sole discretion of The School.
- 2 **Obligations of the Pupil:** The 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. These are the **Purposes of the Award**.
- 3 **Obligations of the Parents:** The Parents are required to support and encourage the Pupil to achieve the Purposes of the Award.
- 4 **Means tested awards:** All means tested awards will be subject to annual review and the Parents shall each year be required to complete a financial means testing form. After any annual review, the School reserves the right to vary the value of the award with immediate effect in accordance with the Scales and will confirm the new value in writing to the Parents.
- 5 **Continuation of the award:** Continuation of the award is dependent upon the Parents satisfying the School's financial requirements each year.
- 6 **Confidentiality:** The value and terms and conditions of the award shall remain confidential to the Parents and the Pupil and the School.
- 7 **Termination of the award:** The award may be terminated on the following grounds:
 - 7.1 **termination on financial grounds:** the School may terminate the award on one Term's notice in writing if, in the opinion of the School Governors acting in good faith the Parents have not satisfied the School's financial requirements under clause 4 and 5.

The termination shall take effect from the date set out in the written notice;
 - 7.2 **termination on the grounds of conduct:** the School may terminate the award by written notice sent to the Parents with immediate effect if, in the opinion of the School Governors acting in good faith, one or more of the following conditions has been fulfilled:
 - 7.2.1 the Pupil has not complied with the obligations set out in clause 2 and in the further opinion of the Governors there has been no significant improvement following consultation with the Parents and / or the Pupil and the issue of a written warning; or
 - 7.2.2 the Parents have not complied with the obligations set out in clause 3; or
 - 7.2.3 the Parents of the Pupil do not keep the value and terms and conditions of the award confidential in accordance with clause 6; or
 - 7.2.4 the Parents withdraw the Pupil from the School without providing proper Notice;
 - 7.3 **repayment of the award:** the Parents will be required to repay all or part of the benefits received under the award if it is terminated in any of the following circumstances:
 - 7.3.1 under clause 7.1 if the Parents have knowingly or recklessly provided false or inaccurate information about their financial position, all benefits received from the date on which the false or inaccurate information was supplied may be repayable; or
 - 7.3.2 under clause 7.2.1 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 Permanent Exclusion or required Removal, up to three Terms' benefits (if received) may be repayable.
- 8 **Cancellation and Withdrawal:** For the avoidance of doubt, the benefit receivable under an award will not apply to the Parents' liability to pay the first Term's Fees if less than a Term's Written Notice of

Cancellation is given, or to any Term for which the School requires payment of Fees in lieu of Notice following Withdrawal without proper Notice.

- 9 **Conditions of Award:** 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 School's *Terms and Conditions* as amended from time to time shall apply and these Conditions of Award shall be interpreted in accordance with them.