



Guidance regarding the award of bursaries

Eton College was founded by King Henry VI in 1440 with the specific purpose of educating 70 poor scholars. Today there are some 1,350 boys in the School of whom just over 260 receive some kind of financial assistance with school fees. Around 100 boys in the School pay no fees whatsoever.

The Provost and Fellows of Eton College are committed to broadening access to the School by offering eligible parents means-tested, financial assistance with the payment of school fees. Such financial assistance is known as a bursary. A bursary is a reduction of fees up to 100%. The level of bursary award depends on the financial circumstances of the applicants.

Bursaries are awarded at the discretion of the Bursaries Committee, who will calculate an initial award in relation to a family's financial and other circumstances (e.g. their savings, investments, pension funds and realisable assets, as well as their income, the size of their family, any other dependants and any other relevant factors). Bursaries are subject to an annual review of parental means and in subsequent years, awards may be varied upwards or downwards, depending on changes to a particular family's circumstances.

Although the School is fortunate to have significant bursary funds, it should be noted that it does not have sufficient funds to satisfy all the bursary applications received.

Parents who are unable to fund the school fees (in full or in part) may apply for a bursary. A bursary award may vary between 5% and 100% and in some cases, include additional support to cover the cost of extras, uniform and laptop.

Requests usually fall into two categories:

- Applicants who are applying for a place at the School at either age 13 or age 16 where entrance to the School is contingent on success at assessment or examination; or
- Existing pupils where a significant and unforeseeable change in parents' circumstances **after the point of entry** has resulted in an inability to pay school fees in full or in part and would result in the boy being withdrawn part way through a stage of education.

NEW APPLICANTS TO THE SCHOOL

Information about Bursaries

Information for prospective parents about the possibility of gaining means-tested financial support with the payment of school fees may be obtained from the School's website and from the Fees and Bursaries Team as follows:

Mrs Ali Wood, Fees and Bursaries Accountant on 01753 370629 or at a.wood@etoncollege.org.uk

Mrs Carolyn Cox, Bursaries Administrator on 01753 370581 or at c.cox@etoncollege.org.uk

Mrs Rachel Good, Bursaries Administrator on 01753 370554 or at r.good@etoncollege.org.uk

The Bursary Application Process

There are different entry routes to the School. Boys must either be:

- i. Registered for a place at the School (for entry at age 13), the normal route of entry; or
- ii. Be applying to the School as an unregistered candidate in respect of one of the following alternative entry routes:
 - a. King's Scholarship (at age 13);
 - b. Music Scholarship (at age 13);
 - c. Orwell Award (at age 16).

Any bursary application must be made in connection with the boy's principal and initial entry route to the School. The deadline for the submission of the Bursary Application Form will be notified to parents of registered boys by the Admissions Department or will be disclosed in the relevant scholarship prospectus. **Late applications will not be considered.**

In the case of divorced or separated parents, all parents who have parental responsibility for the applicant must complete a Bursary Application Form regardless of their current contribution to the applicant's educational costs or living expenses. An application from one parent will remain confidential and will not be shared with the other parent. If one parent has sole responsibility through a court order then evidence of this must be provided.

When making an application for a bursary, parents agree to provide financial and personal data (including possibly sensitive personal data) about their financial and family circumstances. We process this data only for the purposes of making decisions about bursary applications. We engage an external company, Bursary Administration Limited (BAL) to assist us with the bursary assessment process, particularly to undertake home visits on our behalf, in person or by telephone. We will share bursary application data with them. Eton remains the data controller of your data and has entered a data processing agreement with BAL.

Bursary funds come from our own endowment but also from a number of external charities (including the Manifold Trust, Old Etonian Trust and Henry VI Charity). We will share bursary application data with those organisations (where applicable) so that they can make decisions on the application of their charitable funds.

Bursaries are awarded at the discretion of the Bursaries Committee, which comprises the Bursar, the Deputy Head (Partnerships), the Director of Admissions, the Fees and Bursaries Accountant and School masters involved with the admissions process.

In applying for a bursary, parents must agree to disclose full and accurate information about their financial circumstances so that the Bursaries Committee can make a proper and informed decision in respect of each case. **Subsequent discovery of any non-disclosure will result in any award being withdrawn.**

The Fees and Bursaries Accountant is responsible for the management and coordination of the process by which bursary applications are considered.

- Step One: Parents seeking Financial assistance will be required to complete a Financial Aid Request form. The form will be sent either with a 'Details Update' form (March of UK School Year 5 if already registered by then) or with the registration confirmation email (if registered after March of UK School Year 5).

- Step Two: Parents seeking a bursary are required to complete the online Bursary Application Form. This form is intended to establish whether the household has sufficient means to pay all, some or none of the required school fees. The form, which requests details of assets and borrowings and income and expenditure, must be accompanied by full documentary evidence to support the application. The completed form, together with all the necessary documentary evidence, must be submitted online to the Fees and Bursaries Team. Further clarification or documentation may be requested from Parents.

The application form is designed to provide a comprehensive and detailed overview of a family's financial situation. Therefore, some significant time and effort must be committed by parents to complete it in an accurate and timely fashion. The Fees and Bursaries Team is at hand to provide support by email and telephone.

- Step Three: Applications may be subject to a home visit or telephone visit completed by Bursary Administration Limited on behalf of the College in order to ensure the information has been correctly interpreted. We may also verify other details such as property ownership, directorships and County Court Judgements using the services of a legal, regulatory and business information provider.
- Step Four: The Fees and Bursaries Team collates all the information about an application. An initial recommendation is prepared by the Fees and Bursaries Accountant for consideration by the Bursaries Committee but the application is discussed in full by the Bursaries Committee and a final decision is reached collectively.
- Step Five: The Parents of boys who are offered a conditional place at the School are notified in writing of the Bursaries Committee's decision.
- Step Six: Parents offered a bursary are required to accept any conditions relating to the bursary.

Prospective parents should not assume that an initial bursary award will continue throughout their son's time at Eton as parental means are subject to annual review. However, where there are no material changes in financial circumstances, the level of award will not change from year to year.

The Case for Assistance

The Bursaries Committee considers a number of factors when making the decision about whether to make a bursary award.

The level of the bursary required is not influenced by the academic ability of the boy but by the extent of financial need. Each case is assessed on its own merits and the Fees and Bursaries Accountant recommends the level of award required to enable the boy to come to the School. The School has a duty to ensure that its charitable monies are allocated appropriately

As well as current earnings and expenditure, other factors which will be considered in determining the level of award required will include:

- The ability to maximise the financial position or earning power of the family so that the affordability of school fees is prioritised both before a boy joins the School and for the duration of his education at Eton. For example, where there are two partners, we would expect both to be earning unless one is prevented from doing so through incapacity, the need to care for children under school age or other dependants, or the requirements of their partner's work.

The Committee will expect families to make judicious financial decisions regarding other commitments that are consistent with the receipt of charitable funds.

- Opportunities to release any capital. Significant capital savings and investments would be expected to be used for the payment of school fees, as would significant equity values in properties. The extent to which applicants have alternative pension savings in this context will be relevant.
- Contribution to household costs by other family members, or any adults (e.g. step-parents, godparents) unrelated to the boy or from any other source.
- Where fees are being paid to other schools (or universities) we will take these outgoings into account. There is an expectation that applications for bursaries or university loans will have been made, where possible, to other educational establishments in respect of siblings so that the burden of educational fees is shared.
- Acknowledging that others might have a different view, the School considers that the following, for example, may not be consistent with the receipt of a bursary:
 - Frequent or expensive holidays;
 - Luxury cars or expensive car financing arrangements;
 - Investment in significant home improvements;
 - Higher than average non-contractual pension contributions;
 - A second property/land holding; or
 - Failure to honour payments in respect of school fees payable to other educational establishments

Parents are required to sign a declaration confirming that the information they have submitted in connection with their bursary application is complete and accurate.

Awards of financial assistance to one boy do not necessarily guarantee awards to siblings already in the School or subsequently admitted to the School. The Bursaries Committee is sympathetic to changes in family circumstances arising from illness or bereavement but any application submitted for these reasons is means-tested in the same way as any other award. Divorce, per se, is not considered grounds alone for applying for a bursary.

EXISTING PUPILS

Change in Family/Financial Circumstances

Parents with a boy at the School who experience a wholly unforeseen and significant change in their family or financial circumstances after the point of entry may apply for a bursary explaining their situation. All parents with parental responsibility will be required to complete the online Bursary Application Form. All applications will be dealt with in exactly the same manner as set out in the Bursary Application Process notes above.

The Bursaries Committee is unlikely to take a sympathetic view of an application received in respect of a boy already at the School where it becomes apparent that fees could never have been afforded and no previous bursary application has been submitted as funding will already have been committed in respect of these cohorts. Bursary awards are not made in respect of boys in their first year at the School (F block).

Annual Review

For prospective pupils holding a conditional offer of a place at the School:

- Bursary awards are reviewed in the academic year before a boy joins the School.
- For boys with a conditional offer of a place at the School and who apply for either a Music Scholarship or the King's Scholarship the initial review will be timed to fit with the relevant scholarship application process.
- Other initial reviews will take place in the Michaelmas Half.

For current pupils:

- Annual reviews will take place each Spring.

Bursary holders will be asked to provide an update of their financial circumstances. Awards may be varied upwards or downwards depending on parental circumstances. Parents can assume that an award will not change from year to year unless there has been a significant change in their finances and parents demonstrate that their financial decisions continue to prioritise school fees.

Further details and information on our bursary application process are provided on our website which includes an FAQ document.

Confidentiality and Data Protection

The School respects the confidentiality of bursary awards made to families; recipients are expected to do likewise. All organisations involved in the bursary assessment at Eton are bound by Data Protection legislation. Eton's Privacy Notice can be found on our website at:

<https://www.etoncollege.com/privacy-policy/>