

GRANT AWARD POLICY

1. Introduction: The Eaton House School Foundation (the “Foundation”) and Eaton House School (“the School”) is committed to broadening educational access by offering applicants from eligible backgrounds means tested discretionary financial support via assistance with school fees. Such support is called a 7+ Bursary and these may be awarded in the form of a discount of up to 100% against basic fees payable, depending on the financial, compassionate or other pertinent circumstances of applicants.
2. The School has two sites Eaton House School Belgravia and Eaton House School the Manor which are located in Belgravia and Clapham Common, London respectively. 7+ Bursary awards can be made at either location.
3. The 7+ Bursaries scheme is for eligible girls and boys and eligible parents. Eligible applicants about to start Year 2 at state or other primary schools are encouraged to apply for a 7+ Bursary, and if successful would join the School at the start of Key Stage 2 at the start of Year 3.
4. This policy contains an overview of the 7+ Bursary scheme and provides details of the procedure for applications to and awards made under the 7+ Bursary scheme.
5. The School will support up to three 7+ Bursary Awards per annum whilst the Foundation establishes a sufficient financial endowment to support incremental awards.
6. This policy has been authorised by the Trustees of the Foundation. Subject to meeting the conditions here-in the 7+ Bursary awards will be for the full duration of a child’s attendance at the School.
7. For clarification, a 7+ Bursary is distinct from scholarships and/or financial help offered to existing pupils at the School which reward excellence or alleviate short term financial hardship to enable continuity of education for existing pupils at the School respectively.
8. Eligibility: Applicants for a 7+ Bursary are required to complete the application process and documentation.
9. Only parents and children meeting the following criteria can apply for a 7+ Bursary.
 - a. Eligible: Bursaries are available to eligible parents and children who are legally resident in the United Kingdom for the duration of the award and live within 10 miles (as the crow flies) of the School.
 - b. Not eligible: Bursaries are not available to parents and children who are (i) not legally resident in the UK for the duration of the award; or (ii) who live further than 10 miles (as the crow flies) from the School.
10. Criteria: Awards Criteria at 7+
 - a. Eligible applicants in Year 2 at state primary schools are encouraged to apply for a 7+ Bursary and awards are made against the following criteria:
 - i. Positive reference from primary school

- ii. Positive performance in interview with Head
 - iii. Strong performance in 7+ examinations:
 - Maths examination
 - English examination
 - Standardised cognitive ability assessment
 - b. Suitability: attention will be given to the academic assessment results of each applicant with consideration given to potential as well as actual achievement. The applicant must be deemed by the Head to be likely to make sound academic progress following admission and benefit from participation in the wider life of the School
11. Other mitigating factors may also be taken into account including:
- a. Individual family circumstances
 - b. Individual health circumstances
12. 7+ Bursary will be awarded in line with the School's Equality of Opportunity Policy.
13. Financial Considerations: The amount of the bursary award is not only influenced by the level of the academic ability of the child but by the extent of need. Each case is assessed on its own merits and awards are made accordingly. As a guide a 100% bursary is most likely to be awarded to a family with a total household income of £42,500 or less whose only other major asset is their home. This is a guideline and the Trustees will review and judge financial applicability at their sole discretion and in the light of other external circumstances.
14. It is recognised that judgements about what sacrifices a family should make to pay school fees will be personal. However, the Foundation has a duty to ensure that its limited charitable resources are directed towards the most deserving cases and for this reason a 7+ Bursary is not intended to support families that, with reasonable financial and personal sacrifices, could have otherwise afforded paying the full fee.
15. In addition to relevant income, the Foundation will also take into consideration savings, investments and assets when determining financial eligibility for the award. Family finances with the following characteristics would not normally be considered eligible for a 7+ Bursary:
- a. Opportunities to release capital. For example, significant capital savings, retained profits in a business and investments would be expected to be used for the payment of fees, as would equity value in houses
 - b. Proven ability to borrow, where families have been able to secure additional mortgages on buy-to-let properties
 - c. In cases of separation, any significant contributions made by the absent parent
 - d. Contributions to income/costs and school fees by other, wider family members, any adults unrelated to the child or by outside sources
 - e. Other indicators of wealth, for example:
 - i. Frequent or expensive holidays
 - ii. New or luxury cars
 - iii. Investment in significant home improvements
 - iv. A second property/landholdings
 - v. Regular or excessive expenditure
 - vi. The use of disposable income to repay loans for any of the above, for example, directors' loans to personal companies

16. Financial Disclosure to Support Applications: Applications for 7+ bursaries fall into two categories, new applicants and renewal of existing 7+ Bursary Awards which are reassessed on an annual basis.
17. New applicants for a 7+ Bursary Award: All awards are conditional on:
- Full disclosure of information by the parents 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, bank statements, proof of residence including council tax bills etc.).
 - The Foundation satisfying itself that the information given is accurate.
 - The Foundation may seek objective third-party confirmation of a family's financial circumstances (including from a credit reference agency).
 - A home visit from the Foundation or a third party if the Foundation deems this appropriate. The Foundation will not proceed with an application from anyone providing misleading, inaccurate or incomplete information. See Appendix 1.
18. Existing 7+ Bursary Awards: All awards are subject to annual reassessment at the Trustees sole discretion. Once awarded, the 7+ Bursary normally applies for the duration of a applicant's attendance at the School. However, as a condition of the award, parents of 7+ Bursary award holders will be required each year to complete a means-testing form for return by the date indicated together with all supporting documents, as requested. The same conditions apply as above. Continuation of the 7+ Bursary is conditional upon:
- Full disclosure of information requested within the timescales given.
 - The Foundation satisfying itself that the information given is accurate.
 - The Foundation may seek objective third-party confirmation of a family's financial circumstances (including from a credit reference agency).
 - A home visit from the Foundation or a third party if the Foundation deems this appropriate.
19. The Foundation reserves the right to withdraw a 7+ Bursary from anyone providing misleading, inaccurate or incomplete information. In such instances the Foundation may require parents to pay the Foundation the value of all fee remissions and financial assistance previously provided under the scheme.
20. In addition, the Foundation has the discretion to recommend the withdrawal of an award where a applicant's progress, attitude or behaviour has been unsatisfactory or where any fees rightly due are not paid in full within 28 days of the start of each term.
21. Terms of 7+ Bursary Provision: The Foundation reserves the right to change the 7+ Bursaries scheme from time to time in the light of its changing financial or other circumstances.
22. Application Process for 7+ Bursaries: If an applicant wishes to apply for a 7+ Bursary the below process will be followed:
- Step 1: Applicants should contact Head of Admissions and then register via the website. The registration fee will be waived for these applicants. Registration must be completed by the dates published on the Foundation Website.
 - Step 2: Applicants will be invited into school for the assessments and interview with the Head. References will be sought from the applicant's current school.
 - Step 3: The interviewing Head, prepares a recommendation on the suitability of the applicant and their likelihood to thrive at the school. The parents of those applicants who

are successful at the academic assessments will be asked to proceed through the financial checks.

- d. Step 4: Parents will be asked to complete a detailed 7+ Bursary Form for the current and previous tax years. At this stage the parents will be required to provide copies of documents which are to support the application as set out in clauses 17-18 of this policy. Forms and supporting documents must be returned by the date specified. Delayed 7+ Bursary applications cannot be processed.
- e. Step 5: The Foundation and School, together with a third-party specialist company using benchmarking criteria, will assess all financial applications. This may involve the Bursar, their representative and/or a 3rd party specialist company, visiting the families at home to ensure the information has been correctly interpreted and the basis of the financial assessment has been fair. Families who do not make themselves available for a home visit will not be able to proceed with their 7+ Bursary application.
- f. Step 6: Successful applicants are offered a place at the school and are informed of the extent of any 7+ bursary award.
- g. Step 7: The eligible parent(s) completing the bursary application sign(s) to confirm that they have read and understood the terms and conditions relating to a 7+ bursary award set out in Appendix 1 and that they accept the bursary offer.

23. Awards:

- a. A 7+ Bursary is for 100% of fees. Eaton House fees include lunches, stationery and day trips. Residential trips, usually an extra cost, are also included as is support for material uniform and equipment. Subsidy of other 'extras' such as music or drama lessons will be considered on a case-by-case basis.
- b. Travel to and from School is free provided that the applicant uses the School Bus Service.

24. Confidentiality: The value and terms and conditions of the 7+ Bursary shall remain confidential to the parents and the applicant and the Foundation/School. See Appendix 1 below.

25. Record Keeping: All records created in accordance with this policy are managed in accordance with the School's policies that apply to the retention and destruction of records. A confidential admissions record will be kept for each applicant. The information created in connection with this policy may contain personal data. The information may be shared with Trustees of the foundation, the School Bursar, heads and other senior management and school bursary administration agents in support of the application. The Foundation and School's use of this personal data will be in accordance with data protection law. The School has published privacy notices on its website which explain how the School and Foundation will use personal data.

26. Decisions regarding 7+ Bursary Awards: The Foundation reviews a large number of applications for entrance bursaries annually. Each request is comprehensively assessed on its own merits. Funding and places are limited however, and it is not possible to approve every application or to provide justification for each decision. The Foundation will exercise its sole discretion in awarding a 7+ Bursary and its subsequent renewals and as a result not every eligible application for a 7+ Bursary will be successful, even where criteria have been met. The Foundation's decision to award or refuse a 7+ Bursary is final.

Appendix 1: 7+ Bursary Terms and Conditions

1. These terms and conditions are to be read and construed in the context of, and in conformity with, the terms of the bursary policy as amended from time to time by the school in its complete discretion.

The term "Parent" in these terms and conditions has the same meaning as that set out in the bursary policy.

2. Grant of the award: An award is granted at the sole discretion of The Foundation. The Foundation's decision is final and there is no right of appeal.
3. 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.
4. Obligations of the Parents: The Parents are required to support and encourage their child, treat members of the School community reasonably and to uphold the aims and the good name of the School and to comply with the School's Terms and Conditions.
5. 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 at the Trustees discretion. After any annual review, the Foundation reserves the right to vary the value of the award or withdraw it with immediate effect and will confirm the new value of the award in writing to the Parents.
6. Continuation of the award: Continuation of the award is dependent upon full financial disclosure and the Parents satisfying the Foundation's financial requirements each year.
7. Confidentiality: The value and terms and conditions of the award shall remain confidential to the Parents and the Pupil and the School/Foundation.
8. Termination of the award: The award may be terminated on the following grounds:
 - a. Termination on financial grounds:
 - i. The Foundation may terminate the award with effect from the following School term if, in the opinion of the Foundation acting in good faith, the Parents have not satisfied the Foundations' financial requirements under clauses 5 and 6. The termination shall take effect from the date set out in the written notice;
 - b. Termination on the grounds of conduct:
 - i. The Foundation may terminate the award by written notice sent to the Parents with immediate effect if, in the opinion of the Foundation acting in good faith, one or more of the following conditions has been fulfilled:
 - The Pupil has not complied with the obligations set out in clause 3 and in the further opinion of the Foundation there has been no significant improvement following consultation with the Parents and/or the Pupil and the issue of a written warning; or
 - The Parents have not complied with the obligations set out in clause 4; or
 - The Parents of the Pupil do not keep the value and terms and conditions of the award confidential in accordance with clause 7; or
 - in the Trustees reasonable opinion they are adversely impacting the reputation of the School or the Foundation; or
 - The Parents withdraw the Pupil from the School without providing proper Notice;
9. Repayment of the award:
 - a. 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:

- i. 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
 - 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 Permanent Exclusion or required Removal, up to three Terms' benefits (if received) may be repayable.

10. Cancellation and Withdrawal:

- a. Parents may cancel or withdraw from the Bursary by providing at least one term's written notice to the School.

11. Conditions of Award:

- a. 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.

Appendix 2 Governance for award of places

1. The contracts to be put in place with the applicants as per the Grant award Policy will also be shared and agreed with the Trustees ahead of issuance to the applicants' parents.
2. Once applicants are identified and the school has made the final selection and short summary of the reasons will be presented to the Trustees for review and sign off- this summary will include:
 - a. An anonymised outcome of the BAL financial assessment
 - b. A statement from the Head that they are satisfied the applicant has performed well in the academic assessment and interview and that they are happy the child will thrive at the school.
 - c. Confirmation by the school Bursar or other finance representative that the grant award policy has been met in full for the selection.
3. Questions arising from the Trustees will be addressed as fulsomely as possible, subject to maintaining at all times the privacy of the applicant and adherence to the privacy policy.
4. The Summary and the full Q&A will be saved to the file, along with the email confirmations or minuted confirmation from the Trustees that they agree the award.
5. An offer of a bursary will only be made to the applicant and the contracts outlined in the Grant Award policy entered into once the Trustees have agreed the award.
6. The Trustees will not reasonably refuse an award unless, for example, they perceive that the application process has not been managed fairly, or the applicant does not meet the criteria set out in the application policy.