



Assisted Places Policy

Approved Date:	March 2023
Next Review:	April 2024
Owner (Name, Title):	Warden and Registrar
Classification:	
Comment:	

Introduction 3

Eligibility 4

Terms of 11+ Assisted Place Provision 5

Confidentiality 5

Applications..... 5

New applicants 5

Existing Awards - Annual Reassessment 6

Application Process for 11+ Assisted Places..... 6

Appendix 1: 11+ Assisted Place: Conditions of Award 7

Addendum..... 8

Introduction

- 1) This policy has been authorised by the Governors of Forest School in furtherance of the Charities Public Benefit Policy.
- 2) This policy contains an overview of the 11+ Assisted Places scheme in operation at Forest School and, provides details of the procedure for applications to and awards made under the 11+ Assisted Places scheme.
- 3) The School is committed to providing a first-class education to eligible boys and girls from a broad social and financial background by offering eligible parents means-tested financial support with the payment of school fees. Such support is known as an 11+ Assisted Place and will be awarded in the form of a 100% remission on school fees.
- 4) An 11+ Assisted Place is distinct from scholarships and/or bursaries, which are offered in conjunction with scholarships. An 11+ Assisted Place is a means-tested award and applicants are required to pass the entrance assessments to be eligible – i.e. a scholarship award is not necessary.
- 5) 11+ Assisted Places are available to internal and external applicants for entry at 11+ only. Due to the limited financial resources of the School, not every eligible application for an 11+ Assisted Place will be successful. Assisted Places will be awarded based on a financial assessment and granted to pupils who meet the financial criteria for 100% fee remission and demonstrate the most potential to benefit from an academically challenging all round school like Forest. *The School's decision is final and there is no right of appeal.*
- 6) At 16+ 2022 entry we introduced one Assisted Place. This award is means tested and awarded at the discretion of the School to a candidate who performs strongly in the 16+ entrance examination and subsequent interviews, meets the eligibility criteria and shows commitment to study, attendance and co-curricular contributions. This 16+ Assisted Place is given entirely at the discretion of the School and the parental income information included in the Bursary application process via Bursary Assessment Associates will be considered. Therefore, parents do not need to specifically apply for this award.
- 7) The number of 11+ Assisted Places available will be published on the School's website:

[Scholarships, Bursaries & Assisted Places](#)

This policy should be read in conjunction with:

Admissions Policy
Equal Opportunities Policy

Eligibility

- 1) Once the School's financial assessment criteria have been met, places are awarded based on satisfactory performance in the entrance assessments, at interview, the collaborative task, second-round assessments and school reports.
- 2) A published scale of income bands is used to determine the award with reference to parents' relevant income. Relevant income is based on parents' gross income, benefits, allowances and any other form of income, from all sources and is calculated from the information provided via the online form available on the Forest website which is administered by Bursary Assessment Associates. The income bands can also be found on our website. In addition to relevant income, the School will also take into consideration savings, investments and assets when determining eligibility for the award.
- 3) Both parents are required to complete the bursary application and make a financial declaration. This applies equally to separated parents. The school will not accept an application for a child where a parent is refusing to participate in the application process. If there is a court order in place which specifically prohibits a parent from any involvement with the child, then the School may accept this as a reason for the non-resident parent not completing the financial declaration. Under these circumstances, the School will require supporting documentation such as a copy of the court order. This criteria also applies to the annual means-testing of the award.
- 4) 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 11+ 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 11+ Assisted Place:
 - 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 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
 - Contributions to income costs and school fees by other, wider family members, any adults unrelated to the child or by outside sources
 - Other indicators of wealth, for example:
 - Frequent or expensive holidays
 - New or luxury cars
 - Investment in significant home improvements
 - A second property/land holdings

Terms of 11+ Assisted Place Provision

- 1) The School reserve the right to make or alter the 11+ Assisted Place scheme from time to time in the light of its changing financial or other circumstances.
- 2) Any terms on which an 11+ Assisted Place is made to an individual will be set out as part of the offer of a place and will continue for the child's duration at the School subject to annual review undertaken by Bursary Assessment Associates.
- 3) 11+ Assisted Place awards are reviewed annually (see Existing Awards – Annual Reassessment below) to take account of changes in parental circumstances.
- 4) The Bursar's decision in determining eligibility for the scheme and in assessing fees payable is final. The Warden's decision in awarding an 11+ Assisted Place is final.
- 5) Free School lunches are provided to all fee-paying places at Forest School, including pupils who are in receipt of an 11+ Assisted Place.
- 6) Pupils who are awarded an 11+ Assisted Place will also receive financial assistance with the following:
 - A uniform grant for all compulsory items
 - Travel to and from School is free provided that the pupil uses the Forest Home to School Bus Service used. The current routes can be accessed on the website ([School Bus Services](#))
 - A grant for a suitable laptop/device
 - All exam fees are paid for by the School

Confidentiality

The value and terms and conditions of the 11+ Assisted Place shall remain confidential to the parents and the pupil and the School. See Appendix 1 below.

Applications

Applications for financial support fall into two categories: new applicants and existing awards which are reassessed on an annual basis. Bursary Assessment Associates administer both these categories.

New applicants

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 School, in conjunction with Bursary Assessment Associates (BAA) satisfying itself that the information given is accurate. Confirmation of a family's financial circumstances (including from a credit reference agency) may be sought by Bursary Assessment Associates.

- A home visit from Bursary Assessment Associates if deemed appropriate.

The School will not proceed with an application from anyone providing misleading, inaccurate or incomplete information. See Appendix 1.

Existing Awards - Annual Reassessment

- 1) Once awarded, the 11+ Assisted Place normally applies for the duration of a pupil's School career.

However, as a condition of the award, parents of 11+ Assisted Place 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 by Bursary Assessment Associates. The same conditions apply as above. Continuation of the 11+ Assisted Place is conditional upon:

- Full disclosure of information requested within the timescales given
 - The School, in conjunction with Bursary Assessment Associates, satisfying itself that the information given is accurate. Confirmation of a family's financial circumstances (including from a credit reference agency) may be sought.
 - A home visit from Bursary Assessment Associates if deemed appropriate.
- 2) The School reserves the right to withdraw an 11+ Assisted Place from anyone providing misleading, inaccurate or incomplete information. In such instances the School may require parents to pay the School the value of all fee remissions and financial assistance previously provided under the scheme.
 - 3) In addition, the Warden has the discretion to recommend the withdrawal of an award where a pupil's progress, attitude or behaviour has been unsatisfactory. See Appendix 1 below.

Application Process for 11+ Assisted Places

If an applicant wishes to apply for an 11+ Assisted Place the following steps will be followed:

Step 1

Applicants will be required to complete the online form, administered by Bursary Assessment Associates, which will be available on the School's website. This seeks detailed financial information from the parents and supporting financial documentation. The deadline for the completion of this form is 2 weeks prior to the registration deadline for entry at 11+ and must be adhered to. Please see the website for the 11+ entry registration deadline ([11+ Entry](#)).

Step 2

Applicants who have met the financial criteria for an 11+ Assisted Place will be asked to register via our website and the registration fee will be waived for these applicants. Applicants who have not met the financial criteria at this stage will have the opportunity to apply for a full fee-paying place, scholarship and/or bursary in conjunction with a scholarship and will be required to register and pay the full registration fee for their child's application to proceed.

Forms and supporting documents must be returned by the due dates given as delayed 11+ Assisted Place applications cannot be processed, as this may potentially forfeit an 11+ Assisted Place.

Step 3

If the applicant is successful in their financial application, entrance assessments, at interview, the collaborative task, second-round assessments, they will be offered an 11 + Assisted Place at the School.

The 11+ Assisted Place will be subject to Conditions of Award and an annual means-test review conducted by Bursary Assessment Associates. Parents of 11+ Assisted Place award holders will not be required to pay the deposit when submitting the Acceptance Form.

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 candidate.

The information created in connection with this policy may contain personal data. The 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 will use personal data.

Appendix 1: 11+ Assisted Place: Conditions of Award

- 1) **Grant of the award:** An award is granted at the sole discretion of The School. The School's decision is final and there is no right of appeal.
- 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.
- 3) **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.
- 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 via Bursary Assessment Associates. After any annual review, the School 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.
- 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 with effect from the following school term 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:** Parents may cancel or withdraw from the Assisted Place by providing at least one term's written notice to the School.
- 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.

Addendum

Bursary Application – Data Protection Considerations

This information deals with how your data is used and kept secure throughout the bursary assessment process.

The School employs the services of Bursary Assessment Associates to undertake the financial evaluations used to assist it in making bursary award decisions.

For the purposes of your application:

- The School is the Data Controller of your information

- Bursary Assessment Associates is the Data Processor of your information

The following process explains how your information is handled throughout the process:

- 1) An Application Form will be completed and submitted to Bursary Assessment Associates as directed by the school. Supporting paperwork must be included as part of this submission.
- 2) In exceptional circumstances, a paper Application Form and supporting paperwork may be sent either to the school or to Bursary Assessment Associates, if sent to the School, this will be scanned and securely transmitted to Bursary Assessment Associates so that they may undertake the assessment required by the school.
- 3) Bursary Assessment Associates is registered with the Information Commissioner's Office and has satisfied the school as to its arrangements regarding the security of any information and documents you may provide as part of your application.
- 4) Bursary Assessment Associates will contact you to make an appointment for a home visit if this has been required by the school, or to make enquiries which will ensure that any paper financial review is as correct as it can possibly be.
- 5) Bursary Assessment Associates will send its report on your application securely to a named person at the school and will then withdraw from the process unless the school has any further enquiries, they wish the company to make.
- 6) Bursary Assessment Associates will scan and store securely on fully-protected servers any applications, notes and supporting documents regarding your application, and shred any paper documents securely.
- 7) The electronic records will be archived on fully-protected servers for between three to seven years according to the Schools data retention policy.

It should be noted that this process is undertaken only for the purposes of considering your application for a Bursary, and your information will not be passed to any third party.

It should also be noted that the report produced by Bursary Assessment Associates is the property of the school and the report is confidential.