

## Fee Assistance Policy and Procedure (formerly Bursary Policy)

### 1. Fee Assistance at Drumduan

Drumduan School (the School) is an independent body and charity that raises income through fees in order to provide the best education possible whilst being financially viable. However, the School believes that Steiner Waldorf education should be accessible to as many children and their families as possible. Families who find themselves unable to meet the required school fees for the year can therefore apply for support in the form of Fee Assistance, which, if awarded, will usually take the form of a percentage discount on annual fees as charged through the Parent Financial Agreement (PFA).

Eligibility for Fee Assistance is determined through an evidence-based means test. As such, the Fee Assistance Committee are required to ask for confidential information about the finances of all those making an application for Fee Assistance. The School and the Fee Assistance Committee will treat this information as confidential and will use and store it securely and only for the purposes of allocating Fee Assistance, in line with the Data Protection Act 2018.

### 2. How Fee Assistance is funded

Fee Assistance is funded through the income received from full fee-paying parents, some small individual donations and fundraising from School events. There is a finite and limited amount of funding available. Donations received for the purpose of Fee Assistance are relatively few and so most Fee Assistance comes from School fee income.

The Trustees and Fee Assistance Committee reserve the right of absolute discretion in the provision of Fee Assistance.

All applicants are considered on the basis that Fee Assistance is the family's last resort for funding their child/ren's place/s at Drumduan. Applicants must consider all other possible sources of funding before applying for Fee Assistance. This includes, and is not limited to:

- Seeking support from any absent parent, and from extended family
- Claiming all state benefit/s of any kind to which they may be entitled
- If not already in employment, seeking employment
- Releasing any significant capital held in assets where appropriate, for example land or property
- Fundraising or grants of any other kind

### 3. Eligibility for Fee Assistance

Families who have already pursued all avenues open to them in an attempt to fund their child/ren's education at Drumduan and are still unable to meet the cost of both School Fees and basic living costs, are welcome to apply for Fee Assistance.

Families whose income is reduced by a lifestyle choice will not be eligible for Fee Assistance. This includes, and is not limited to:

- families where one partner is not working (not including the parents of very young children, or parents who are full time carers)
- families where one partner chooses to pursue a line of work that is not able to help support the family financially
- families who make the choice to live in a location or situation which places a high burden on their finances

Fee Assistance usually begins when the eldest child is in Class 1.

Families who have just joined the School may apply for Fee Assistance after committing to at least six half terms paying full fees. In practice, this means that their first child must have completed at least three half terms paying full fees and be in their fourth or fifth half term when their Fee Assistance application is made\*.

This is to ensure that the limited support available is targeted towards families with a long-term commitment to the School, and for whom the School already seems to be a good educational fit. Families continuing into the School having received Moray Council funded Kindergarten places will also need to pay full fees for at least six terms.

*\*Half terms are as follows: 1. August to October, 2. October to December, 3. January to February, 4. February to March/April, 5. April to May, 6. May to June.*

It is the responsibility of the family to read this policy carefully and determine their basic eligibility according to the above criteria before spending time in submitting an application.

### 4. How to apply

If you wish to apply for Fee Assistance, you are required to submit details of your financial circumstances, including supporting documentation as requested, using a standardised application form.

It is the responsibility of the family to request an application form if they wish to apply for Fee Assistance. Forms are available from [reception@drumduan.org](mailto:reception@drumduan.org). Applications must be submitted before the relevant deadline for each application round (see table below). Deadlines must be

strictly adhered to, since the Fee Assistance Committee is not able to meet multiple times for each application round.

Applications should be submitted to the Operational Manager in an envelope marked clearly marked 'Confidential - Fee Assistance Application [and date]'. They will then be passed on, unopened, to the Fee Assistance Committee.

Please note that the application must show all relevant information for all legal guardians of the child/children concerned. If a child's parents/carers live separately, the relevant full information must be supplied for all parties. In cases where there is an acrimonious separation between two parents, two forms may be submitted for the same child if this is considered to be more practical, and this may on occasion be requested by the Fee Assistance Committee. The income and expenditure of all parties will be taken into consideration unless satisfactory clear evidence of mitigating circumstances is provided to demonstrate why this cannot be the case.

## 5. Application timeframe and deadlines

There are three application points in the year. Applications from existing Fee Assistance recipients should be made in the Spring application round. The Summer and Autumn rounds will only be open to new applicants and applicants whose circumstances have changed since the previous application round.

	<i>Application forms available before</i>	<i>Application deadline</i>	<i>Fee Assistance decision given by</i>	<i>Fee Assistance applied to fees paid from</i>
Spring round 2023	Friday 24 <sup>th</sup> March 2023	Friday 14 <sup>th</sup> April 2023	Monday 1 <sup>st</sup> May 2023 *	Start of Autumn Term 2023
Summer round 2023	Friday 9 <sup>th</sup> June 2023	Friday 30 <sup>th</sup> June 2023	Monday 7 <sup>th</sup> August 2023	Start of Spring Term 2024
Autumn round 2023	Friday 3 <sup>rd</sup> November 2023	Friday 24 <sup>th</sup> November 2023	Monday 18 <sup>th</sup> December 2023	Start of Summer Term 2024
Spring round 2024	Friday 9 <sup>th</sup> February 2024	Friday 1 <sup>st</sup> March 2024	Monday 25 <sup>th</sup> March 2024	Start of Autumn Term 2024

*\*Applicants whose Fee Assistance decision is delayed beyond the point of notice for the Autumn Term 2023, will be permitted to give notice to the School within one week of receiving their Fee Assistance decision, without being obliged to pay fees beyond the end of the Summer Term 2023.*

## **6. How your application will be considered**

The Board of Trustees appoints a Fee Assistance Committee, which will be made up of a minimum of three people, to include wherever possible at least one member who is neither staff of the School nor a parent of a child in the School.

The Fee Assistance Committee will review each application and supporting evidence once received. The initial stage of this will be done using a standardised and anonymised process. Family circumstances will then be taken into consideration. Applicants may need to provide further information if requested and may be invited to meet in person with members of either the Fee Assistance Committee or the Board of Trustees, to discuss their application. Please make every effort to be available for this meeting should one be requested.

Applications can only be assessed if fully completed and accompanied by all the requested necessary supporting information. The Fee Assistance Committee doesn't have the capacity to follow up missing information and may not be in a position to consider incomplete or ambiguous applications.

The Fee Assistance Committee endeavours to offer assistance to all those who are genuinely in need of support. However, support cannot be guaranteed in any particular case, due to the limited nature of available support.

The receipt of Fee Assistance in one year will not automatically guarantee Fee Assistance being given in the following or subsequent years, even if the applicant's circumstances have not changed. The Fee Assistance Committee does recognise, however, the importance of consistent education and will endeavour to support as many families as possible to continue their journey at Drumduan.

## **7. Notification of Fee Assistance decision**

If your application is successful, you will receive a letter notifying you of this. This letter constitutes an agreement between yourself and the School, which you will need to acknowledge. You will be bound by the same requirement as other families to make payment of the remaining fees promptly and in full on or before the date they fall due.

If you have not been successful in your Fee Assistance application, you will be informed of this in writing, with any reasons, as soon as possible.

## **8. Appealing a decision**

If you are not satisfied with the Fee Assistance Committee's decision, you may appeal in writing to the Trustees, stating the reason(s) you feel the decision to be unfair, within two weeks of the date of your decision letter.

The Trustees will then appoint another Trustee to the committee, to review the application and ensure that the Bursary Policy has been adhered to and that all evidence has been taken into account. You will be informed in writing as soon as practical, whether your appeal has been successful or not. If successful, then you will receive a Fee Assistance offer or a revised Fee Assistance offer. Please note that the decision of this Appeal Committee is final.

In cases of appeal, please note that your personal and financial information may need to be made available to the Trustee reviewing the process. Information will continue to be treated as confidential and will be used and stored correctly in line with the Data Protection Act 2018.

## 9. Reviewing Fee Assistance awards during the year

If you are awarded Fee Assistance and your financial situation improves during the school year to the point at which you can reasonably afford to increase your contribution to the fees by any amount, you are obliged to declare this in writing to the Fee Assistance Committee. The Committee will then consider whether to reassess your situation for the remainder of the year, at which point Fee Assistance may be amended or withdrawn.

You will not be asked to repay any Fee Assistance granted up to the point at which your circumstances changed. Repayment of the whole or part of any Fee Assistance received when your circumstances had already improved, may be requested at the Fee Assistance Committee's discretion.

The Fee Assistance Committee also reserves the right to review any applications on a termly basis, at which point you will receive a written request to provide a new statement of income and expenditure, and to disclose any changes in your financial circumstances that may affect your ability to pay fees. As with your initial application, evidence will be requested to support this review and Fee Assistance may be withdrawn if you do not provide this information by the date requested.

## 10. Temporary Fee Assistance

**Temporary** Fee Assistance can sometimes be offered to families who are experiencing **unexpected** financial difficulties due to life events including serious illness, death of a partner, loss of employment, loss of housing or separation. This will usually apply for a limited time period only. If further support is required an additional application may need to be made.

In almost all cases, **Temporary** Fee Assistance will be awarded using the process and deadlines outlined above. It differs from Fee Assistance in that it may not be applicable for a whole year, and may be subject to frequent review to ensure that support is targeted where it is needed most.

If there is an urgent need for **Temporary** Fee Assistance between application rounds, please email [feeassistance@drumduan.org](mailto:feeassistance@drumduan.org).

Applicants for Temporary Fee Assistance have the same right of appeal as other applicants.