



## **Bursary Policy**

(Including Confidentiality Privacy Policy and Data Protection Notices)

### ***Background***

Following the closure of the Trust's school, Haslemere Preparatory School, in July 2016 and the subsequent sale of the school grounds in February 2017, the School's Board of Governors and Trustees decided to utilise the net proceeds of sale to continue with the Trust's charitable objects of promoting and providing for the advancement of education of children of Prep School age attending independent fee-paying schools which have sound Christian and moral values, by way of giving financial assistance towards the payment of school fees for deserving pupils in the form of the grant of bursaries.

Accordingly, and by leave of the Charity Commission, the charitable objects and powers of the Trust were suitably amended, and the Trust's name was changed from Haslemere Preparatory School Trust to The Heights Educational Bursary Trust Limited. Afterwards, requisite policies, documentation and procedures for the application, assessment and grant of means-tested bursaries were prepared and were adopted by the Trust, which are reviewed and revised each year as deemed appropriate in order to meet changing values and circumstances.

References below to 'parents' include natural parents, step-parents and legal guardians.

### ***The Trust's financial limitations and its planned closure at the end of 2025***

In view of the size of the Trust's remaining available funds, bursaries have been limited to families resident in and to schools located in the counties of Surrey, West Sussex and Hampshire and usually only one bursary per family per academic year is granted. Bursaries awarded represent a specified percentage of a school's standard tuition fees for Day pupils and do not include any other costs charged by the school. Bursaries are also subject to clawback if the family financial position improves markedly after the bursary has been granted, or if untruthful, inaccurate or misleading information has been provided to the Trust.

Bursaries for the 2024-2025 academic year will be limited to day pupils who will then be in Year Groups 7 or 8. Applications will continue to be subject to means-testing and will be assessed with reference to the family situation and the circumstances disclosed in the information provided in and with the bursary application form as well as in response to any requests for further information made by the Trust when processing the bursary application.

## ***Aims of the Trust***

These are as follows:

- To help deserving children (boys and girls) who would benefit, or who are benefiting, from a Prep School education and whose parents for the time being are unable to fund all the school fees payable for the 2024-2025 academic year, or whose current family circumstances make it difficult for them to do so.
- To ensure that children from a broad spectrum of society and from all backgrounds, and whether already attending a Prep School, or attending a State School and who would benefit from attending a Prep School, have the opportunity of being granted a bursary by the Trust for that academic year to enable them to do so.
- To assess each application for a bursary on its own merits and by the perceived degree of financial need, fairly, impartially and consistently pursuant to this Bursary Policy and in the light of the financial information and family circumstances that have been disclosed in the Bursary Application Form and in any supporting documentation, and also in the light of any comments and information about the child and his/her parents and family which may have been obtained from the Head or the Bursar of the school which the child has attended, is attending or is to attend.
- To ensure at all times that the Trust's charitable object is met and is fully complied with and that the Trust's conduct and actions in processing and granting bursaries address and fully meet the Charity Commission's current public benefit requirement.
- To work positively and sympathetically with any parents who following the grant of a bursary to their child may for good and justifiable reasons experience temporary difficulties in paying their share of school fees for the 2024-2025 academic year.

## ***Factors taken into account by the Trust in assessing applications for bursaries***

These include:

- The ability of parents, and the steps they have taken and could take, to improve the financial position and earning power of the family.
- Whether both parents have gainful employment.
- The ability to release capital, such as from savings and investments or from the value of the equity in their home.
- The financial sacrifices made by parents to raise or release funds for payment of school fees.
- In cases of separation, the contribution made by the absent parent or, if it is the case, the reason why no such contribution is being made.
- Financial help for household costs and living expenses received from other, wider family members and as well as by persons unrelated to the child.
- Efforts made by parents to secure financial help from the school and other sources of educational financial help.

- The child's suitability for the selected school and his/her actual or potential success as a pupil of the school including (but not limited to) in respect of their actual or potential academic achievements.
- The support for the bursary application and for the child received from the Head of the school.
- The social needs of the child where they are relevant, for example where the child has suffered and been materially affected by bullying, discrimination or abuse at their present school.
- Any special family circumstances, such as a serious or terminal illness or disablement of a parent, or of a sibling, or a disability of or medical condition or problems suffered by the child.
- The behaviour of the parents towards the school and the child's conduct and behaviour in school.

***Factors usually regarded as being inconsistent with the receipt of a bursary***

These include:

- Frequent or expensive holidays
- Expensive new or luxury cars and more than two cars/vehicles for the family's use
- Substantial equity in the parents' principal private residence
- Significant home improvements during the previous two years
- Second homes, rental properties and other property interests and land investments
- Collections of art, ceramics, stamps, coins, musical instruments or other items of value in total in excess of £5,000.

***Confidentiality, Privacy Policy and Data Protection Notices and related rights***

- All applications for a bursary and all financial and personal information provided by parents to the Trust in support of an application will be held and treated by the Trust in strictest confidence.
- All documentary financial and personal information provided by parents and retained by the Trust in hard copy form will be stored in locked, non-portable storage containers and/or in a locked attended storage unit or area.
- All financial and personal information emailed by parents to the Trust will enjoy protection from: (i) the hosted desktop services which the Trust receives from Hosted Desktop UK Ltd and which ensures that all data received by the Trust electronically is protected to the highest available level (with that company's servers being located in two of Europe's most secure data centres which are accredited and certified to ISO27001 and PCI DSS security standards), and (ii) the Trust's firewall and malware products and other multi-layered internet IT security services provided to the Trust by ESET Internet Security.
- Any information or comments requested and received by the Trust from Heads and Bursars of schools about a child who is receiving a bursary or for whom a bursary has been applied, or about the conduct and behaviour of the parents concerned towards the school in question, will also be held and treated by the Trust in strictest confidence.

- The Trust will take all reasonable precautions to prevent the loss, misuse or alteration of the financial and personal information provided by parents and subject to its financial capability will use its reasonable endeavours to keep its IT systems and electronic communications protected against viruses and other harmful effects. However, the Trust cannot and does not guarantee the integrity or efficacy of its IT systems or of its electronic communications being virus-free, and so parents shall be deemed to have accepted that the Trust shall not bear any responsibility or incur any liability of any kind if at any time they are not.
- The financial and personal information provided by parents to the Trust and any information and comments received from Heads and Bursars of schools about them or their child will only:
  - be used and processed fairly and reasonably by the Trust for the purposes of considering and assessing applications for bursaries, which is the sole legal basis of and the Trust's legitimate interest for such use and processing,
  - be shared as may be necessary with the Trustees, the Trust's Bursar, the Trust's accountants, Tropman & Co Ltd, and the Trust's Independent Examiners of the Trust's accounts, Messrs Traviss & Co, and will not be shared with or transferred to any other third parties without the prior written consent of the parents concerned,
  - be retained in safe and secure custody by the Trust: (i) for so long as the parents concerned are receiving bursarial help from the Trust, or (ii) until such time as their application has been declined, after which all such information will be physically destroyed if in hard copy form and permanently deleted if in electronic/digital form,
  - be held and processed by the Trust in accordance with the Data Protection Act and Articles 13 and 14 of the General Data Protection Regulation.
- The Trust is its own Data Controller. The Trust's Bursar is the Trust's Data Processor. The Trust's and the Bursar's contact details are:
  - 39 Station Road, Liphook, Hampshire, GU30 7DW
  - Email address: [bursar@heightstrust.co.uk](mailto:bursar@heightstrust.co.uk)
  - Telephone: 01428 727861
- The Trust will recognise and comply with the exercise of all rights which parents and their children have under all Data Protection legislation, including the right of access to any information held by the Trust (and which information was not provided by the parents) and also the right to request rectification of such information and to have it erased where it is wrong, biased, unjustified or misleading.
- Parents have the right at any time to withdraw their consent to the Trust holding and processing their financial and personal information. However, if they exercise this right then any related bursary which has been granted by the Trust and is ongoing will immediately be and be deemed terminated, and if such withdrawal of consent takes

place during a school term for which a bursary payment has already been made by the Trust then the parents concerned will refund the Trust the pro rata amount (based on time calculated on a day to day basis) of that bursary payment.

- Parents also have the right at any time to lodge a complaint with a supervisory body about the Trust's handling and processing of their and their child's financial and personal information.
- The Trust does not use or engage with any automated decision-making, including profiling and is happy to answer any queries which parents may have about any of these matters – queries should be raised with the Trust's Bursar whose contact details are set out above.

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