

Stratford-upon-Avon School is a company limited by guarantee, registered in England and Wales under number 7690776, whose registered office is Stratford-upon-Avon School, Alcester Road, Stratford-upon-Avon, Warwickshire CV37 9DH

Policy Title	<b>FINANCIAL ASSISTANCE (year 7 to 13)</b>
Policy Reference	<b>SUAS.F.1203.PRO02</b>

DISCLOSABLE UNDER FREEDOM OF INFORMATION ACT 2000	Yes / No	No
TO BE PUBLISHED ON WEBSITE	Yes / No	Yes

<b>POLICY OWNERSHIP</b>	
Governor Committee:	Resources
Department responsible:	Business
Post-holder: <i>(Title and Name)</i>	Director of Finance and Operations
<b>LINKED PROCEDURES REF:</b>	F.1203.PROproc01
Responsible Person - Procedures	Finance Manager

<b>POLICY IMPLEMENTATION DATE:</b>	March 2012, this revision May 2023
<b>PLANNED REVIEW INTERVAL:</b>	3 years
<b>PLANNED NEXT REVIEW DATE:</b>	May 2026

*Stratford-upon-Avon School welcomes comments and suggestions from the public and staff about the contents and implementation of this policy. Please email your comment to [policy@stratfordschool.co.uk](mailto:policy@stratfordschool.co.uk).*

**i POLICY OUTLINE**

Stratford-upon-Avon School (SuAS) provides financial support to students under a number of circumstances.

**ii PURPOSE**

The purpose of this policy is to define the obligations and strategic intentions of Stratford-upon-Avon School, the Academy Trust, in ensuring that:

- Compliance with legal and statutory requirements is assured;
- Clear criteria can be seen to be fairly applied;
- An ethical and sustainable context, broadly in line with the ethos of the school, is maintained.

**iii IMPLICATIONS OF POLICY**

Compliance with the requirements laid out in the Department for Education's Financial Handbook for Academies, and thus with Stratford-upon-Avon School's Financial Regulations Manual. There are no significant implications for health and safety, risk, or staff training. There may be budget implications.

**iv EQUALITY ANALYSIS**

Every policy, at its inception, will be the subject of an Equality Analysis (EA) completed by the policy writer, which should be circulated to all those being consulted, with the draft policy.

**v CONSULTATION**

Consultation if significant change is required, will be with all staff holding core financial responsibilities, plus the Pupil Premium lead.

**vi PROCEDURE**

Procedure is the method by which the strategic intent of the policy is realised and is thus an 'instruction manual' on how the policy outcome is to be achieved.

Insofar as the procedure to support this policy is necessary, it will be an independent document, for internal use by Academy staff. The procedure reference is shown on the Policy Identification Page. The development or amendment of the procedure is at a tactical / operational level. There is therefore no necessity for active referral to the Governing Body **unless** the policy intent has been altered.

**vii RELATED POLICIES AND PROCEDURES**

- Financial Regulations Manual (procedure)
- Charging and Remissions Policy

**viii DOCUMENT HISTORY**

The policy will be subject to regular review once ratified by the Governing Body. The history of the policy will be recorded using the chart following.

Date	Author /Reviewer	Amendment(s)	Approval/ adoption
March 2012	V Hopkins	Policy creation for academy	March 2012
September 2014	K Cullimore	Minor updates of nomenclature. Policy intent unchanged. Amalgamation with post 16 bursary policy.	7 <sup>th</sup> October 2014
June 2017	V Hopkins	Staff responsibilities. No other changes	July 2017
November 2019	A Mason	Move to 3-year review Amend ref to SBD.	9 <sup>th</sup> December 2019
May 2023	A Mason	Position title change. Form removal, addition of 4.3	22.05.23

# Financial Support Policy

## 1 Introduction

- 1.1 The school recognises that education places financial demands on parents and there are some occasions when parents/carers will find it hard to meet these demands. The school would like to support parents/families where possible.
- 1.2 We realise that it is hard for parents/carers to ask for financial support but since the size of the school's support fund is limited, the school will have to apply certain criteria in deciding whether or not support can be given.
- 1.3 This policy applies to students in all years, from year 7 through to year 13.

## 2 Criteria

- 2.1 Consideration will be given to students whose parents/carers fulfil one or more of the following:
  - Experiencing situations which are causing financial difficulty, for example caused by recent job loss, bereavement or other serious and unforeseen circumstances
  - Eligible for Free School Meals currently
  - Have been eligible for Free School Meals during the previous 6-year period (thus linked with Pupil Premium funding).
  - In receipt of benefits
  - Not in receipt of benefits, but still experiencing financial difficulties in general.
- 2.2 Each application will be reviewed on an individual basis and will take into consideration a number of factors, such as any amount already awarded, number of siblings and the amount available in the school's support fund.
- 2.3 Priority will be given to parents/carers who have not already been supported by this policy.
- 2.4 Criteria are subject to change, linked to the government's benefit policy, and parents are reminded that the school website will carry the most up to date information on the criteria.

## 3 Qualifying Resources

- 3.1 Application for financial support will be considered for:
  - Obligatory items of school uniform including P.E. Kit
  - Costs of educational visits that are integral to the curriculum
  - Educational equipment e.g. text books
  - Transport

## 4 Making an Application

- 4.1 Applications are made using the Financial Assistance application form which can be found at: [Stratford upon Avon School - Financial Assistance](#). This can be completed by the parent/carer or a member of staff in their place. Evidence should be provided to support the eligibility criteria. Forms and attachments should be submitted in a sealed envelope, marked confidential, to:

Year 7 to 11: Pastoral Manager  
Year 12 to 13: Post 16 Development Coordinator

- 4.2 All information provided on this form will be kept in the strictest confidence.
- 4.3 Requests may be further referred to the Director of Finance and Operations for consideration and financial approval.

## **5 Notification**

- 5.1 If financial assistance is agreed, the parent/carer will be notified in writing by Business Manager/ Post 16 Development Coordinator, as appropriate.

## **6 Appeal process**

- 6.1 Administration and allocation of financial assistance is subject to our normal governance and audit regimes, in line with the school's funding agreement with the Department for Education. If anyone feels aggrieved about how their request has been handled, they should follow the normal complaints procedure within the school.

## **7 Subsequent requests for financial assistance**

- 7.1 If financial assistance is provided, there may not be a requirement to complete another application form for further qualifying resources in the same academic year. In this instance, all that would be needed is a request in writing to the Business Manager / Post 16 Development Coordinator, who will determine if any further clarifying information is required.