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# THE PERSE

## SCHOOL

CAMBRIDGE

**BURSARY POLICY**

**September 2017**

# **THE PERSE SCHOOL BURSARY POLICY September 2017**

**This policy can be made available in large font or other accessible format.**

For the purposes of bursary awards, “The School” means The Perse Preparatory School and The Perse Upper School – Academic Years 3 to 13 inclusive.

In this policy “parent” of a pupil or prospective pupil means any person with legal parental responsibility and legal guardians.

## **1. Aims**

The Perse School is a registered charity and is committed to fulfilling its charitable purposes. The School is aware of its obligations under the Charities Act 2011 and seeks to promote the principles of public benefit in accordance with the law.

The School wishes to encourage pupil access and to ensure that the educational opportunities offered by the School are made available to children from a broad spectrum of society, regardless of their family’s ability to pay school fees. This aim reflects the School’s founding objectives as envisaged by Dr Stephen Perse in 1615.

## **2. Availability of Bursaries**

Bursaries are available for pupils attending the Prep and the Upper Schools (Academic Years 3 to 13 inclusive) and are awarded at the absolute discretion of the School. No bursaries are available for pupils attending the Perse Pelican Nursery and Pre-Preparatory School (Year Groups Nursery through to Year 2 inclusive).

There is no automatic transfer of a Prep School bursary to the Upper School. Parents of Prep School bursary holders must apply for an Upper School entrance bursary, if required, by the deadline set out in section 5.1 below.

## **3. The Perse School Bursary Scheme**

The School’s bursary scheme is designed to assist parents who for financial reasons might otherwise be unable to send or continue to send their child to the School. The scheme includes both entrance bursaries for the parents of new pupils (including pupils transferring from the Pelican School to the Prep School and from the Prep School to the Upper School), and emergency bursaries for parents who experience a significant change in their financial circumstances which could not reasonably have been foreseen at the time of their child’s admission to the School.

All bursary applications are treated in the strictest confidence. Pupils will not be made aware that they benefit from a bursary unless informed by their parents.

The value of individual bursaries ranges from 5% of tuition fees to full-fee bursaries although the School would normally expect parents to make some contribution towards fees. All bursaries are fully means-tested and are assessed on a sliding scale depending on the parents’ combined annual income, net assets and any other relevant information.

Decisions regarding bursary awards will be notified to the parents in writing. The decision of the School regarding the award or level of bursary is final.

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Holders of bursary awards may also be eligible for additional bursary funding to assist with the costs of school trips, normally where the intended learning objectives are central to the curriculum. Applications for school trip bursaries will be considered on a case by case basis.

In exceptional circumstances, holders of Upper School bursary awards may also be offered additional funding to assist with the cost of school lunches.

Any school trip or lunch bursary will be awarded at the absolute discretion of the School.

## **4. Eligibility**

Parents of any pupil or prospective pupil may apply for a bursary. The School deems bursary applications as being made jointly by all parents irrespective of marital status.

Bursaries are only offered to the parents of those children who meet the academic entrance requirements set by the School. It is important to recognise, however, that, due to budgetary constraints, it is possible that not every eligible application for a bursary will result in an offer of financial assistance from the School.

Households which may be classified as 'low income' but which own or have access to substantial assets may be ineligible to receive a bursary.

## **5. Application for a bursary award**

Applying for a bursary will not prevent parents of pupils or prospective pupils from applying for a scholarship in respect of their child/(ren). However, when assessing the value of a bursary award, the School will take into consideration the value of any scholarship awards made to the pupil.

### **5.1 Entrance Bursaries**

All applications for entrance bursaries must be made by ticking the relevant box on the registration form.

The deadline for entrance bursary applications is the same as that set out by the School for the receipt of the registration form and registration fee. Relevant dates are published in the Admissions section of the School's website. The School, at its absolute discretion, may consider late bursary applications up to the date of the particular entrance examination.

The School Accountant will notify applicants of whether they have been successful by letter in advance of the relevant acceptance deadline.

The School will not consider applications for an entrance bursary for pupils who have already accepted a full fee-paying place.

### **5.2 Emergency Bursaries**

For the avoidance of doubt, other than in the most exceptional of circumstances, applications for emergency bursary assistance will only be considered for pupils who have been at the School for at least 12 months.

Applications for emergency bursary assistance should be made in writing to the Deputy Bursar. If the financial position of parents with a pupil already at the School worsen

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unexpectedly, they should contact the Deputy Bursar as soon as possible so that a way forward can be agreed.

Emergency bursaries will be considered by the School as quickly as possible after it has been notified by parents of a sudden or unexpected adverse change in their family circumstances and/or financial position. The outcome will be notified to the applicants in writing.

In addition to considerations of financial need, the School will have regard to the pupil's standard of conduct and progress when assessing for emergency bursary funding.

The maximum duration of a Prep School emergency bursary is until the end of Year 6. Families requiring bursary assistance beyond the Prep School may apply for an Upper School entrance bursary.

In the first instance, the maximum duration of an Upper School emergency bursary is until the next natural breakpoint in the pupil's education. This will be the end of Year 9 for pupils in Year 7-9 and the end of Year 11 for pupils in Years 10 & 11. Parents of Upper School pupils in receipt of an emergency bursary will be advised of the deadline for applying for further bursary funding beyond the breakpoint.

Irrespective of the maximum duration stated above, all emergency bursaries are subject to annual reassessment (see 10 below) and any improvement in the parents' financial circumstances may be reflected in the level of bursary offered for the following year.

## **6. Statement of Financial Circumstances**

All parents who have applied for a bursary are required to complete the detailed Statement of Financial Circumstances form which will be supplied to them by the School Accountant. The School is unable to consider bursary applications where a parent declines to provide the requested information.

The School cannot accept responsibility for administrative errors or post going astray. Parents who have not received a Statement of Financial Circumstances for completion one week before the published date of the External Entrance Test or Sixth Form Interviews and Tests should contact the School Accountant urgently.

The Statement of Financial Circumstances is designed to provide a full picture of the income, outgoings, assets, liabilities and family circumstances of parents. It must be completed in full and be supported by documentary evidence of the figures disclosed. Incomplete applications will be returned and only considered once the form has been completed in full and all relevant documentary evidence has been supplied. In addition, parents must provide any supplementary information that is requested.

In cases of separation or divorce, the financial circumstances of parents will be considered as part of the bursary assessment irrespective of any financial or other arrangement made between them. This will include consideration of the level of income and net assets of any step-parent or partner living in the same household, together with any financial commitments relating to children from previous marriages/relationships. Individual Statement of Financial Circumstances forms will be supplied to separated or divorced parents for completion.

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#### 7. The Case for Assistance

The School will consider a number of factors when assessing an application for financial support.

- **Suitability:** All children for whom a bursary application is made must meet the School's normal academic requirements for entry. Bursary funds are limited and in situations where the total value of potential bursary awards to qualifying applicants exceeds the budgeted bursary funds available, the School will have regard to the individual's academic performance and potential when awarding the available funds.
- **Financial Limitations:** The amount of the bursary award is determined on the basis of financial need. Each case is assessed on its own merits and awards are made accordingly, subject to the School's resources.

The School has a duty to ensure that all bursary awards are well focussed and therefore, as well as current earnings, other factors which will be considered in determining the necessary level of grant will include:

- The ability of a family to improve its financial position or earning power. For example, where there are two parents, both are expected to maximise or seek to maximise their income either through employment or self-employment, unless prevented from doing so through such factors as incapacity, the need to care for young children or other dependents, or the requirements of their partner's work.
- Opportunities to release any capital. Significant capital savings and investments are expected to be used for the payment of school fees.
- A significant level of equity in the family home.
- Contribution to household costs by other family members, by any adults unrelated to the child or by outside sources.
- Where fees are being paid to other schools, the School's grant will take into account these outgoings. Applicants are expected to apply for financial help from all education institutions attended by members of the family at the time that an application is made to the Perse for bursary assistance.
- Entitlement or access to other discretionary receipts or facilities.
- Acknowledging that others might have a different view, the School considers that the following would not be consistent with the receipt of a bursary:
  - Frequent or expensive holidays.
  - Luxury cars (unless required as part of their employment).
  - Significant investment in major home improvements.
  - A second property and/or additional land holdings.
  - Discretionary receipt of luxury accommodation or other advantages.
- **Other Factors:** It is recognised that, in addition to financial constraints existing within a family, there may be other major factors (pastoral and social) which the School needs, at its absolute discretion, to take into account when considering a bursary award.

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#### 8. Bursary Assessment

The School has appointed Bursary Administration Limited (BAL), an independent company specialising in assessing bursary applications, to undertake bursary assessments and reassessments on its behalf. However the School reserves the right to assess or reassess certain awards without reference to BAL.

- Parents seeking a bursary award must complete a Statement of Financial Circumstances form which seeks to establish the financial circumstances of the household.
- Parents will be advised of the deadline for submitting the Statement of Financial Circumstances which will be in advance of the relevant entrance test. Parents may request confirmation of receipt by BAL if required as the School cannot take responsibility for post going astray.
- Forms submitted after the deadline will not be considered except in exceptional circumstances, by agreement with the School Accountant.
- The completed Statement of Financial Circumstances, together with full documentary evidence must be submitted direct to BAL.
- Incomplete applications will be returned for the form to be completed in full and/or all relevant documentary evidence to be supplied.
- BAL will contact the parents to make an appointment to discuss the application in a meeting which normally takes place in the applicant's home.
- Subsequent to the meeting, BAL will provide a written report to the School detailing their findings.
- The report will be considered in detail by the School Accountant and Deputy Bursar who will make a recommendation to the Bursar.
- The Bursar will consider this recommendation and make a final decision which will be notified to the parents in writing. The decision of the Bursar on behalf of the School regarding the offer of a bursary or the level of that bursary is discretionary and final.

Failure to provide a complete and accurate Statement of Financial Circumstances may lead to a bursary being adjusted, withdrawn or withheld.

The School reserves the right to make allowance for any contribution to fees being made by outside trusts, relatives or any third parties against the value of the bursary award. However, the school expects parents to explore all possible avenues for the funding of school fees.

In general the total fee discount awarded by the School in relation to a particular child will equal the amount determined by the financial assessment. This means that scholarships are usually amalgamated with bursaries when considering the level of a bursary award.

#### 9. Value of Bursaries

Each bursary offer will reflect the particular circumstances of the recipient and will usually be expressed as a % remission of tuition fees. The bursary award will be shown on the face of each termly bill as a deduction against the full tuition fee.

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## **10. Annual Reassessment and Changes in Circumstances**

All bursaries are awarded on an annual basis and, with the exception of short term awards awarded for one year or less, are subject to annual reassessment.

Should any of the information disclosed in support of a bursary application become inaccurate during the course of a year, the School must be informed without delay. Failure to divulge requested information or notify a change in circumstances to the School may lead to a bursary being adjusted, withdrawn or withheld.

## **11. Confidentiality**

The School respects the confidentiality of bursary awards made to parents and recipients are expected to do likewise.

## **12. Conditions applying to Bursary Awards**

The award of a bursary places obligations on the parents and the pupil as detailed in the Scholarship and Bursary: Conditions of Award which are notified to the parents both with the initial bursary offer and following every annual means-test review. In addition to the pupil being expected to follow the School Rules on behaviour and discipline, a pupil in receipt of bursary funding is required to be credit to the School, to set a good example to other pupils and to approach their work with application and endeavour.

The Conditions of Award are subject to change from time to time and are available from the School Accountant on request.

## **13. Publicity**

The School views a socially diverse pupil population as a key component of a full and balanced education for all pupils. The availability of bursaries is advertised on the School's website, in the Prep and Upper prospectuses, in suitable professional publications, in the local press and to local primary schools.

If additional information to that available on the school website and in the relevant school prospectus is required, applicants should contact the School Accountant or the Deputy Bursar for more information. The relevant contact details are: Tel: 01223 403892; email:accountant@perse.co.uk.

## **13. Other sources of Bursary Assistance**

In addition to the School's Bursary Fund, there are a number of educational and charitable trusts which provide assistance with tuition fees. In the majority of cases, these are to assist children who are already attending a fee-paying school and due to a change of circumstances may be unable to remain. The School encourages parents to apply for support where it is felt a good case can be made for assistance.

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<b>Authorised by</b>	Sir David Wright On behalf of the Board of Governors
<b>Date</b>	4 <sup>th</sup> September 2017

<b>Effective date of the policy</b>	4 <sup>th</sup> September 2017
<b>Circulation</b>	Governors /all staff via SharePoint / parents of pupils and of prospective pupils [on request]
<b>Status</b>	Advisory. This policy will be reviewed annually (next review September 2018)

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