



**THE PERSE**  
SCHOOL  
CAMBRIDGE

## **Bursary Policy**

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**The Perse School**

**September 2020**

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

This policy applies to the Perse Preparatory School and the Perse Upper School (academic years 3 – 13 inclusive), together known as “the School”. Unless otherwise stated, it does not apply to the Perse Pelican Nursery and Pre-Preparatory School.

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

### **1. Introduction**

- 1.1. 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.
- 1.1. 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.
- 1.2. A bursary award is means-tested support with the payment of tuition fees. Bursaries differ from scholarships in that they are based on the financial need of the applicant’s family. A bursary award might be up to 100% of tuition fees and may in addition include provision for school lunches.
- 1.3. A bursary or renewal of a bursary is awarded at the sole discretion of the School. The School is under no obligation to provide any information regarding its decision whether or not to award a bursary or of the level of any bursary awarded.
- 1.4. The award of an entrance bursary will attract a discount on the securing fee of the same percentage as the bursary award.
- 1.5. It is important to recognise 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. The School reviews a large number of applications for entrance bursaries and for emergency bursaries annually. Each request is comprehensively assessed on its own merits and it is the School’s intention to support as many as it can. Funding is limited however, and it is not possible to approve every application.
- 1.6. Bursary awards are subject to re-assessment of parental means each year and may be varied upwards or downwards or withdrawn, depending on the outcome of the financial review.
- 1.7. The School has appointed Bursary Administration Limited (BAL), an independent company specialising in assessing bursary applications, to undertake bursary assessments and re-assessments on its behalf. However the School reserves the right to assess or re-assess awards without reference to BAL.
- 1.8. Parents of bursary holders may be asked to feedback on the impact that attending the School has had on their child.

## 2. The Case for Assistance

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

- 2.1. **Suitability:** The School exercises discretion in awarding a bursary. 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.
- 2.2. **Financial Considerations:** 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.

It is recognised that judgements about what sacrifices a family should make to pay school fees will be personal. However, 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 partners, 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, as would significant equity values in houses. Households which may be classified as 'low income' but which own or have access to substantial assets may be ineligible to receive a bursary.
- The School deems bursary applications as being made jointly by both parents irrespective of marital status. Where parents do not live together, the financial circumstances of both parents and their households will be assessed irrespective of any financial or other arrangements made between them, unless there is sufficient evidence that it would not be reasonable to do so. The assessment is based on the School's assessment of both parents' ability to contribute towards fees. The assessment 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.
- 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, applicants are required 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. It is unlikely that the School will offer a level of bursary assistance in excess of that accepted for siblings in other schools.
- Entitlement or access to other discretionary receipts or facilities.

The School considers that the following would not be consistent with the receipt of a bursary:

- Frequent or expensive holidays.
- New or luxury cars including those on hire purchase.
- Significant investment in home improvements which are not required as part of the essential maintenance of the family home.
- Regular, excessive expenditure.
- Ownership of investment properties or a second home and/or additional land holdings, unless part of a business which is providing adequate income to be considered as such.
- Use of disposable income to repay loans for any of the above or to repay, for example, directors' loans to personal companies.
- Placing of significant amounts into long term investments or pension funds.
- Discretionary receipt of luxury accommodation or other advantages.

2.3. **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.

### 3. Types of Bursary

3.1. **Entrance bursaries** are available for pupils entering the Upper School (Academic Years 7 to 13 inclusive) whose family would be unable to fund some or all of the tuition fees in the event that they were successful in the entrance exam and offered a place at the School.

Entrance bursaries are not available for pupils attending the Prep School or Perse Pelican Nursery and Prep-Preparatory School (Year Groups Nursery through to Year 6 inclusive).

3.2. **Emergency bursaries** are available for pupils attending the Upper and Prep Schools (Academic Years 3 to 13 inclusive) whose family experiences a significant change in their financial circumstances which could not reasonably be foreseen at the time of their admission to the School.

Emergency bursaries are not ordinarily available for pupils in the Perse Pelican Nursery and Pre-Preparatory School (Year Groups Nursery through to Year 2 inclusive). However, during the academic year 2020-21 only, the Emergency Bursary Scheme will be extended to include pupils at the Perse Pelican if changed financial circumstances are as a result of the Covid-19 pandemic.

### 4. The Perse School Bursary Scheme

4.1. 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.

4.2. 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.

- 4.3. 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.
- 4.4. 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.
- 4.5. 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.
- 4.6. Holders of bursary awards in Years 9-11 will be eligible for additional bursary funding to assist with any usage charge arising under the Middle School Digital Learning Scheme. The usage charge bursary will be the same percentage deduction as awarded against tuition fees.
- 4.7. 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.
- 4.8. In exceptional circumstances, holders of Upper School bursary awards may also be offered additional funding to assist with the cost of school lunches.
- 4.9. Any school trip or lunch bursary will be awarded at the absolute discretion of the School.

## **5. Entrance Bursaries**

### **5.1 Availability**

- 5.1.1 Bursaries are available to pupils entering the Upper School and are awarded at the discretion of the School. Bursaries are only offered to the parents of those children who meet the academic entrance requirements set by the Upper School.
- 5.1.2 The School Accountant is responsible for the management and coordination of the application process.

### **5.2 Application Deadline:**

- 5.2.1 All applications for entrance bursaries must be made by ticking the relevant box on the Upper School registration form, or in the case of Prep School pupils due to transfer to the Upper School, by email sent to the School Accountant ([accountant@perse.co.uk](mailto:accountant@perse.co.uk)).
- 5.2.2 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 [Upper School](#) and [Sixth form](#) admissions sections of the School's website.
- 5.2.3 The School, at its absolute discretion, may consider late bursary applications up to the date of the particular entrance examination.

- 5.2.4 The Upper School operates a Register of Interest List for prospective pupils seeking entry outside the normal admissions timetable. Where a place becomes available, the School may, at its discretion, consider any bursary application made, but due to budgetary constraints cannot guarantee that an award will be offered.

**5.3 Statement of Financial Circumstances form:**

- 5.3.1 The School Accountant will supply applicant parents with a statement of financial circumstances form for completion and advise them of the submission deadline. Individual Statement of Financial Circumstances forms will be supplied to separated or divorced parents for completion.
- 5.3.2 This form, which seeks to establish the financial circumstances of the household, requests details of income, expenditure, capital and debt and must be supported with full documentary evidence as specified on the statement of financial circumstances form.
- 5.3.3 The School is unable to consider bursary applications where a parent declines to provide the requested information.
- 5.3.4 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.
- 5.3.5 The completed form, together with the supporting evidence, must be submitted by the advised deadline which will be in advance of the relevant entrance test. Parents may request confirmation of receipt if required as the School cannot take responsibility for post going astray.
- 5.3.6 Applications submitted after the submission deadline or incomplete applications will not be accepted.

**5.4 Bursary Assessment:**

- 5.4.1 The School, together with a third party specialist company (Bursary Administration Limited) using benchmarking criteria, assesses applications in order to establish the likely level of support which will be required in order to allow the child to attend the School.
- 5.4.2 Bursary Administration Limited will visit families of children who have been offered a place at the School at home to ensure that the information has been correctly interpreted and the basis of the financial assessment is fair. Families who do not make themselves available for a home visit will not be able to proceed with their bursary application. Where a parent lives overseas, the home visit will be replaced by a telephone/video call.
- 5.4.3 Bursary Administration Limited will provide a written report to the School detailing their findings.
- 5.4.4 The report will be considered in detail by the School Accountant and Deputy Bursar who will make a recommendation to the Bursar.

- 5.4.5 In cases where the School assesses a bursary without reference to BAL (see section 1.7 above), the School Accountant and Deputy Bursar will prepare a report and make a recommendation to the Bursar.
- 5.4.6 The Bursar will consider the recommendation and make a final decision which will be notified to the parents in writing in advance of the acceptance deadline. 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.
- 5.4.7 Where a bursary offer is made, the parents will sign to confirm that they accept the bursary and have read and understood the terms and conditions attaching to the bursary award.

## **6. Emergency Bursaries**

### **6.1 Assessment:**

- 6.1.1 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.
- 6.1.2 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 unexpectedly, they should contact the Deputy Bursar as soon as possible so that a way forward can be agreed.
- 6.1.3 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.
- 6.1.4 The process outlined in paragraphs 5.3 and 5.4 above will be followed when assessing emergency bursaries.
- 6.1.5 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.

### **6.2 Maximum duration of an emergency bursary:**

- 6.2.1 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.
- 6.2.2 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 8 for pupils in Years 7 and 8, the end of Year 11 for pupils in Years 9 - 11, and the end of Year 13 for a Sixth Form pupil. 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.



- 6.2.3 Pupils at the Perse Pelican are, exceptionally, able to apply for an emergency bursary during 2020-21 if the financial hardship results from Covid-19. This bursary support will only be for a maximum of one year, to the end of the academic year 2020-21.
- 6.2.4 Irrespective of the maximum duration stated above, all emergency bursaries are subject to annual reassessment (see 8 below) and any improvement in the parents' financial circumstances may be reflected in the level of bursary offered for the following year.

## **7 Applications made by one parent only**

- 7.1 A bursary application will be deemed to be incomplete if it does not contain details of the financial circumstances of both parents. Separated or divorced parents, may if they prefer, complete separate applications for each of their households.
- 7.2 In very limited circumstances, the School may consider an application from only one parent. The parent making the application will need to provide evidence as to the reasons for the absence of the other parent. Parents making an application without the consent of the other parent should be aware that the mere fact of divorce or separation is not sufficient evidence of the other parent's inability to support the child financially. Nor is the financial contribution they may be required to make under a court order.

## **8 Annual Reassessment and continuing duty of disclosure**

- 8.1 All bursaries are awarded on an annual basis and, with the exception of short term awards of one year or less and Covid-19 emergency bursaries, are subject to annual reassessment.
- 8.2 Current bursary holders will be issued with a new statement of financial circumstances form for completion at the start of the Easter Holidays each year. The form must be submitted by the notified deadline which will be at the start of May. The outcome of the bursary reassessment will be notified to parents at the end of the Summer term.
- 8.3 The School has the discretion to reduce or withdraw a bursary award where the parents have failed to support the School, for example by the late payment of any contribution they are making towards the fees.
- 8.4 Bursary support will not continue if the statement of financial circumstances form and/or supporting documentation is not submitted by the notified deadline.
- 8.5 All bursary awards are subject to an ongoing duty of disclosure. Along with the annual reassessment, bursary holders are required to inform the School of any improvement in their financial circumstances such as an increase in salary, or receipt of an inheritance, whenever the change occurs even if outside the annual reassessment period.
- 8.6 Notifying the School of a change in circumstances will trigger a reassessment. Failure to divulge requested information or notify a change in circumstances to the School may lead to a bursary being adjusted, withdrawn or withheld and the parents may be required to repay some or all of the bursary award.

## **9 Withdrawal and/or repayment of a bursary award**

- 9.1 The bursary may be withdrawn at any point (including before the pupil starts at the School) if incomplete information is provided, or information relevant to the assessment is excluded, or attempts are made to conceal or mislead the School in its assessment. This includes, for example, failing to disclose funds or assets held abroad, failing to disclose certain bank account statements, or the practice of moving assets during the bursary assessment period.
- 9.2 In addition to the withdrawal of the bursary, parents may be required to repay bursary funds obtained on the basis of false, misleading or incomplete information.
- 9.3 The bursary may also be withdrawn with immediate effect if the balance of the account remains unpaid 28 days after a written reminder has been sent to the parents.
- 9.4 If a bursary is withdrawn, parents may be required to pay any additional sum required to meet the full securing fee.

## **10 Confidentiality**

- 10.1 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.
- 10.2 Recipients of bursary awards are not advertised. The School respects the confidentiality of bursary awards made to parents and recipients are expected to do likewise. There are some circumstances where a donor who has supported a bursary award may ask the School to share information about the recipient of the award. In these circumstances, the School will ask for the consent of the recipients of the bursary before doing so.
- 10.3 The School will share appropriate information with Bursary Administration Limited. Further information about how the School shares data with Bursary Administration Limited is included in the Statement of Financial Circumstances form.

## **11 Conditions applying to Bursary Awards**

- 11.1 The award of a bursary places obligations on the parents and the pupil as detailed in the *Bursary Awards: Conditions of Award* which are notified to the parents both with the initial bursary offer and following every annual means-test review. Parents should ensure that they understand the conditions of award before they accept a place at the School with a bursary award.
- 11.2 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.
- 11.3 The *Bursary Awards: Conditions of Award* are subject to change from time to time and are available on the School's website.

## 12 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 and in the Upper and Sixth Form 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 Upper and Sixth Form prospectuses 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.

## 15. Version Control

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| <b>Authorised by</b>                | Jonathan Scott<br>On behalf of the Board of Governors                        |
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