Bursary Policy

The Perse School

April 2026

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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 Perse Upper School, i.e., academic years 6 – 13 inclusive (both entrance and hardship bursaries) and to the Perse Preparatory School, academic years 3-5 inclusive (hardship bursaries only) together known as "the School". It does not apply to the Perse Pelican Nursery and Pre-Preparatory School, academic years Nursery to year 2 inclusive.

In this policy references to "parent" of a pupil or prospective pupil means any person with legal parental responsibly for the child, any person who has signed the acceptance form and legal guardians.

1. Introduction

1.1. The Perse School is a registered charity (the **School**) 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. This policy has been authorised by the trustees of the School in furtherance of the School's public benefit policy.

1.2. 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 Perse in 1615.

1.3. 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 may be up to 100% of tuition fees, Upper School lunch charges and usage charges arising under the Controlled Device and Middle School Digital Learning Schemes as notified in the bursary offer letter. For children awarded higher levels of bursary support, additional funding may also be offered to assist with the cost of certain extras. Perse School bursaries do not cover the cost of uniform or equipment; however, an allowance may be granted in relation to such items as notified in the bursary offer letter.

1.4. 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.

1.5. The award of an entrance bursary will reduce the value of any Securing and Induction fee payable under clause 3.3 of the School's Terms and Conditions by the total percentage of bursary assistance offered to the pupil on their admission to the School. If, before a pupil enters the School, the bursary offer is withdrawn or reduced, the Securing and Induction fee due will be recalculated. Parents may be required to pay an additional sum sufficient to meet the recalculated securing and induction fee.

1.6. 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 many applications for entrance bursaries and for hardship bursaries annually. Subject to paragraph 1.7 below, 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 may not be possible to approve every application.

1.7. Other than in very limited circumstances where a relocation is already confirmed, the School does not consider bursary applications from families who, at the time of registration, live outside a reasonable travelling distance to the School (defined as within one hour's travelling time).

1.8. Save in relation to parents who are awarded short term bursaries for one academic year or less, 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.

1.9. 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.

1.10. 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 adjustments 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 or the need to care for children below compulsory school age or other dependents.

- 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 financial circumstances of any stepparent or partner living in the same household, including 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 (expressed as a percentage of fees) of bursary assistance in excess of that accepted for siblings in other schools.
- Tuition fees being paid for siblings attending the Perse Pelican Pre-Prep and Nursery will be excluded from expenditure used in the bursary assessment.
- Unless also subject to a hardship or Year 6 entrance bursary application, tuition fees being paid for siblings attending the Perse Prep School will be excluded from expenditure used in the bursary assessment.
- Entitlement or access to other discretionary receipts or facilities.

The School considers that the following would <u>not</u> 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.
- High levels of discretionary expenditure, either regular or one-off.
- 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 or Year 6 at the Prep School 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 entering the Perse Pelican Nursery and Pre-Preparatory School or Years 3 – 5 at the Prep School.

3.2. **Hardship bursaries** are available for pupils attending the Upper and Prep Schools 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, or in the case of pupils transferring from the Perse Pelican School to the Perse Preparatory School, the date of the transfer offer letter.

Hardship bursaries are not available for pupils attending the Perse Pelican Nursery and Pre-Preparatory School.

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 percentage remission of tuition fees, Upper School lunch charges and usage charges under the Controlled Device and Middle School Digital Learning Schemes as notified in the bursary offer letter. The bursary award will be shown on the face of each termly bill as a deduction against the full tuition fees and the notified extra items.

4.3. The School reserves the right to reduce the value of a bursary where the award of a scholarship would otherwise cause the pupil's billing account to be in credit.

4.4. Individual bursaries range from 5% to 100% 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.

4.5. 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.

4.6. 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.

4.7. Holders of bursary awards may also be eligible for additional bursary funding as notified with the bursary offer letter and 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 or Year 6 at the Prep 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 School.

5.1.2 The School does not accept Upper School entrance bursary applications from parents of pupils who enter the Prep School in Year 6 with a full fee-paying place. Parents are expected to have applied for a Year 6 entrance bursary if they believe that fees will be unaffordable going forward.

5.1.3 Parents of pupils who entered the Prep School in Years 3-5 inclusive where entrance bursaries are not available may apply for an Upper School entrance bursary on transfer to Year 7.

5.1.4 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 relevant registration form and providing an email address for the parent who will act as lead applicant, or in the case of Prep School pupils due to transfer to the Upper School, by email sent to the School Accountant (bursary-application@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 Prep School, 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 Prep School and Upper School operate Register of Interest Lists 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 Submission of Financial Information:

5.3.1 Financial information must be submitted via the School's online bursary application portal. Parents who are unable to complete an online application should discuss this with the School Accountant at an early stage and a paper application form can be supplied if necessary.

5.3.2 The lead applicant will be sent an email from noreply@perse.co.uk inviting them to activate an account on the bursary application portal. This email will include the

submission deadline which will be in advance of the published date of the relevant entrance test. Applications submitted after the deadline will not be accepted.

5.3.3 The School cannot accept responsibility for administrative errors or emails/post going astray. If the activation email has not been received one week after the published closing date, parents should contact the School Accountant urgently.

5.3.4 In cases of separation or divorce, the lead applicant will be sent the initial activation email. Once the account is activated, a separate account, linked to the same application will be created for the second parent, and an activation email will be sent to them. To ensure the second parent has sufficient time to complete their part of the application, the lead applicant should activate their account promptly.

5.3.5 The School is unable to consider bursary applications where a parent declines to provide the requested information.

5.3.6 The applicant parents will use the bursary application portal to submit an online statement of financial circumstances, which seeks to establish the financial circumstances of the household, requesting details of income, expenditure, capital, and debt, and supporting documents. The completed application which comprises both the statement of financial circumstances and supporting documents must be submitted by the deadline notified in the activation email.

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 The School may conduct an initial review of bursary applications. Parents will be informed by the School if their bursary application will not progress to the next stage of assessment. Applications which the School considers may have the potential to meet the bursary assessment criteria will be shared with Bursary Administration Limited via the online portal.

5.4.3 Bursary Administration Limited will visit families 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 out of area (as described at clause 1.7 above), the home visit may be replaced by an online meeting.

5.4.4 Bursary Administration Limited will provide a written report to the School detailing their findings.

5.4.5 The report will be considered in detail by the School Accountant and Chief Financial Officer who will make a recommendation to the Bursar.

5.4.6 In cases where the School assesses a bursary without reference to BAL (see section 1.9 above), the School Accountant and Chief Financial Officer will prepare a report and make a recommendation to the Bursar.

5.4.7 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.

5.4.8 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.

5.4.9 Where parents accept a full fee-paying place following an unsuccessful entrance bursary application, there will be no further opportunity to apply for bursary funding where their financial circumstances remain similar to those reported at the time of the application. However, where a family experiences a serious change in financial circumstances after their child has been at the School for at least 12 months, a Hardship bursary application may be made (see paragraph 6 below).

6. Hardship Bursaries

6.1. Assessment:

6.1.1. For the avoidance of doubt, applications for hardship bursary assistance will ordinarily only be considered for pupils who have been at the School (defined as the Perse Upper School and Perse Preparatory School year groups 3-13 inclusive) for at least 12 months and are at the absolute discretion of the School.

6.1.2. Applications for hardship bursary assistance should be made in writing to the Chief Financial Officer. If the financial position of parents with a pupil already at the School worsen unexpectedly, they should contact the Chief Financial Officer as soon as possible so that a way forward can be agreed.

6.1.3. Hardship 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 hardship 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 hardship bursary funding.

6.2. Effective Date and Maximum duration of a hardship bursary:

6.2.1. Hardship bursaries will take effect from the start of the term following the date of the bursary offer letter. The award will not be backdated and fees already billed will remain payable in full.

6.2.2. The maximum duration of a hardship bursary is as follows:

6.2.2.1. Prep School: until the end of the academic year.

6.2.2.2. Upper School: 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.

6.2.2.3. Applications for bursary assistance to be extended beyond the maximum duration stated in 6.2.2.1 and 6.2.2.2 above may be considered at the absolute discretion of the School. Applications for extended bursary assistance should be made in writing to the School Accountant no later than February half term before the hardship bursary is due to cease, or the date given in the Bursary offer letter in the case of bursaries awarded after the February deadline.

6.2.2.4. Families in receipt of a Prep hardship bursary who require bursary assistance beyond the Prep School may apply for an Upper School entrance bursary in accordance with paragraph 5.1 above.

6.2.2.5. Unless awarded for less than one academic year, all hardship 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.

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, or unless otherwise specified, are subject to annual reassessment.

8.2. Current bursary holders will be asked to complete a new online bursary application in: November (Year 11 bursary holders), December (Year 6 Prep entrance bursary holders) or after the February half term holiday each year (all other Upper School bursary holders) and will be notified of the submission deadline.

8.3. For applications submitted by the advised deadline, the outcome of the bursary reassessment will usually be notified to parents by:

8.3.1.the Christmas holidays (Year 11 bursary holders);

8.3.2.the February half term holiday (Year 6 Prep entrance bursary holders); or

8.3.3.at the start of the Summer half term holiday (all other Upper School bursary holders).

8.4. Where applications are submitted after the deadline, the outcome of the bursary reassessment will be notified to parents as soon as practicable, subject to the availability of Bursary Administration Limited to complete their report and Perse School staff to prepare and review the recommendations.

8.5. Where applications have not been submitted by the end of the Summer term, the bursary will be withdrawn with effect from the start of the following academic year.

8.6. 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 persistent late payment of any contribution they are making towards the fees.

8.7. Parents who are unable to complete an online application should discuss this with the School Accountant at an early state and a paper application form can be supplied if necessary.

8.8. 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 (for example an increase in salary or receipt of an inheritance), whenever the change occurs even if outside the annual reassessment period.

8.9. Notifying the School of a change in circumstances may 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 bank accounts, 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 if the parents have knowingly or recklessly provided inaccurate, false, misleading, or incomplete information about their financial circumstances.

9.3. Where fees remain unpaid, the School has a right under clause 4.6 of the *Terms & Conditions* to exclude a pupil (14 days after which the pupil will be deemed to be withdrawn, the contract will be terminated immediately, and a term's fees in lieu of notice will become payable in addition).

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 provided on the online portal.

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. 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 Prep, 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 prospectuses is required, applicants should contact the School Accountant for more information. The relevant contact details are: Tel: 01223 403892; email: bursary-application@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.

14. Record Keeping

All records created in accordance with this policy are managed in accordance with the School's *Records Management policy* and *Records Retention Schedule*.

The information created in connection with this policy may contain personal data. The School's use of personal data will be in accordance with data protection law. The School has published privacy notices on its website which explain how the School will use personal data. The School's approach to data protection compliance is set out in the School's data protection policies and procedures. In addition, staff must ensure that they follow the School's data protection policies and procedures when

handling personal data created in connection with this policy. This includes the School's *Data Protection Policy* and *Information Security and Sharing Data Guidance*.

15. Version Control

Authorised by	Jonathan Scott On behalf of the Board of Governors

Effective date of the policy	April 2026
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Status	Advisory. This policy will be reviewed annually (next review March 2027)