

Bursary Policy

If your child would benefit from the educational experience that St John's College School offers, but your family is not in a position to cover the full fees, you may be eligible for a Bursary.

In this policy, references to "parent" of a pupil or prospective pupil means any parent or legal guardian.

Introduction

St John's College School, Cambridge (the "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 Governors are committed to broadening access to the School by offering to eligible parents means-tested financial support with the payment of tuition fees. Such support is known as a Bursary and Bursaries may be awarded in the form of a discount of up to 100% on tuition fees payable, depending on the financial, compassionate or other relevant circumstances of applicants. Bursaries may, in addition, include provision for extras such as school uniform and trips. Bursaries are means tested according to parental income and assets. The value of the Bursary and number of Bursary awards will also depend on the funding available.

If you would like to enquire about a Bursary for your child, we urge you to raise the subject with the Registrar as early as possible during the admissions process. However, to be considered for a Bursary, your child must be registered with us and have been offered a place, following our assessment process. Bursaries may only be offered to children entering Form 1 (Year 3) and above. Bursary applicants need to be aware that the offer of a place at the School does not guarantee that Bursary funding can or will be put in place.

For entry in September of any given academic year, the deadline for submitting a Bursary application is 31st January of that same calendar year. Applications after this date cannot be considered except in exceptional circumstances. Bursaries are awarded at the discretion of the Bursaries Committee, who will calculate an initial award level in relation to a family's financial and other circumstances (e.g. their savings, investments and realisable assets, as well as their income, the size of their family, any other dependants and like factors). Bursaries are subject to an annual review of parental means and in subsequent years, awards may be varied upwards or downwards, depending on changes to a particular family's circumstances, and the value of the Bursary Fund at the relevant time.

Requests for financial support usually fall into the following categories:

- **New applicants** to the school from Form 1 (Year 3) onwards where a place has been offered but parents are unable to fund the fees and other educational expenses (in full or in part).
- **Existing pupils** who either currently benefit from a Bursary, or where there is a change in parents' circumstances after the point of entry, which results in difficulty in meeting tuition fees and may result in the child being withdrawn part way through a stage of education.

Within the second category there may be temporary arrangements dealing with the disbursement of "hardship" funds when local or national economic circumstances affect the income of school families.

The Application Process

Bursaries may be made available to parents of children entering Form 1 (Year 3) and above. They are awarded at the discretion of the Bursaries Committee, which includes the Head, the Director of Finance and members of the Governing body. The Director of Finance is responsible for the management and co-ordination of the following process by which Bursary applications are considered:

1. Both parents seeking a Bursary are required to complete a *School Fee Assistance Application Form*, which seeks to establish the identity and financial circumstances of the family and of each parent. In the event both parents are separated and/or divorced, financial information from both parents should still be provided, as should the financial information of any other adults in the same household as either of the parents. The form, which requests details of all income, savings and capital, must be accompanied by full documentary evidence. The completed forms, together with the necessary documentary evidence, are to be submitted to the Director of Finance no later than 31st January in any year for bursaries to start the following September. Applications made after this date cannot be considered other than in exceptional circumstances.

Both parents seeking a Bursary will be required to sign a declaration stating that the information they have provided is both accurate and complete as well as requiring them, in the event their application for a Bursary is successful, to update the School in the event those circumstances change during the academic year in question. If any information provided in the application, or as part of the broader assessment process, is subsequently discovered to be false or misleading or incomplete, the School may withdraw any award which has been made with immediate effect and, depending on the circumstances, may require reimbursement.

The school may also terminate its parent contract (See Clause 14 of the Terms and Conditions) and require the removal of the child in such circumstances.

2. The Director of Finance assesses all applications in order to establish the likely level of support which will be required and which can be provided in order to allow the child to attend the School. This may involve the Director of Finance, or their representative, visiting the parents' home to ensure the information has been correctly interpreted and the basis of the financial assessment has been fair. Parents may also be asked to meet the Director of Finance or their nominee at the School and/or provide additional supporting information as may be requested. The Director of Finance prepares a recommendation, which is considered with the Head and a joint recommendation is then reached.
3. The joint recommendation is presented to the Bursaries Committee for approval by the Chair of the Committee. The Committee may request further information to inform their deliberations.
4. The parents are advised whether their child is to be offered a Bursary.
5. Parents are then required to sign a letter accepting the place at the School as well as an acknowledgement agreeing to any of the specific conditions relating to the Bursary award.

The School may use an external organisation to assist with processing Bursary applications, including making home visits. Information provided by applicants may be made available, in confidence, to that organisation for those purposes.

All personal data processed in connection with the School's arrangements for Bursaries shall be processed in accordance with the School's privacy policy which is available on the School's website and is otherwise available from the School upon request.

Timelines for applications

New Pupils:

Requests for Entrance Bursaries for those starting at St John's in September of any given year should be received by the 31st January preceding that September.

An invitation to submit an application, with details of the information required to support the application, timescales, and the process will be sent to parents/guardians no later than the middle of January (following entrance assessments), with a deadline to submit their application and supporting documentation directly to the School by the end of January in the year of entry. This will allow review by the Bursaries Committee to take place by the end of February, with decisions on the outcomes issued to applicants by the middle of March. Any applications for Entrance Bursaries for the academic year starting in September received after January of the same year will only be considered in exceptional circumstances, and never after the end of May of the same year.

Existing Pupils:

Those who currently benefit from a Bursary will have their Bursaries reassessed each year, and parents with children in the School will be asked to reapply for assistance for the next academic year in the December of the previous calendar year. It is important that parents inform the Director of Finance of any change in circumstances at this time.

Change in Family Circumstances:

Parents with a child at the school whose financial circumstances suddenly change may apply to the Director of Finance for an Emergency Bursary, explaining their situation and using the *School Fee Assistance Application Form*. Such awards are subject to the availability of funding, cannot be guaranteed, and will usually be for short term support only.

The Case for Assistance

The Bursaries Committee will consider a number of factors when making the judgement as to the justification for support and the extent of such support. In the main, the child's suitability for the School is the first consideration in granting support.

Suitability

Bursary funds are limited and those judged most suitable will be given priority as those likely to gain most from the school's educational provision. Each pupil to whom support is offered must, in the opinion of the Head, be likely to make good academic progress following admission and possess the potential to develop the quality of his or her work and benefit from participation in the wider, co-curricular activities on offer at the School. Previous school reports will be consulted for evidence of the pupil's attainment, progress and behaviour.

Financial limitations

The amount of the Bursary award is not influenced by the academic ability of the child but by the extent of financial need. Each case is assessed on its own merits and awards are made accordingly subject to the School's ability to fund these within the context of what is viable within its overall budget. 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 fair and so, as well as current earnings, other factors which will be considered in determining the necessary level of grant will include (but are not limited to):

- The ability to improve the financial position or earning power of the family. For example, where there are two partners, both would be expected to be employed unless one is prevented from doing so through incapacity, the need to care for children under school age or other dependents or the requirements of their partner's work.
- Opportunities to release any capital. Significant capital savings and investments would be expected to be used for the payment of school fees as would 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, wider, family members, 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 an application is made to St John's for bursary support. It is unlikely that the School will offer a level of Bursary assistance in excess of that accepted for siblings in other schools.
- 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;
 - Regular, excessive expenditure;
 - 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;
 - Placing of significant amounts into long term investments or long-term non-contractual pension contributions;
 - Failure to honour payments in respect of school fees payable to other educational establishments;
 - A second property/land holdings.

In cases where demand on the School's Bursary funds exceeds the availability of funds, those judged likely to gain most from the educational provision at St John's College School will be awarded bursaries. Inevitably difficult decisions may have to be made at this stage, which may result in no award being made.

Other factors

It is recognised that, in addition to academic ability and financial constraints, there may be other circumstances which should be considered as part of the School's holistic judgment. These include:

- where a child has siblings at the School (though a Bursary award to one child does not guarantee an award to a sibling);
- where the social needs of the child are relevant (eg: where a child is suffering from bullying at their present school);
- where a parent is critically or terminally ill or is unable to secure permanent employment due to poor health or incapacity;
- where a separation has resulted in the child having to be withdrawn from the School adding to the stress of coping with the parents/guardians separating, although the School will nonetheless consider the financial circumstances of both parents in such cases;
- where a previous school has awarded bursary support (but please note that bursary support from a previous school is no indication or guarantee that the parents would be eligible for Bursary support at St John's).

Annual Review

All Bursary awards are subject to repeat testing of parental means each year and may be varied upwards or downwards depending on parental circumstances. Current Bursary holders will be issued with repeat means-testing forms in December each year for return by the end of January.

For those previously in receipt of bursaries, the Head and Director of Finance, in making their joint recommendation to the Bursaries Committee, have the discretion to recommend to the Governors the reduction or withdrawal of an award not only where a pupil's progress, attitude or behaviour has been unsatisfactory but also where the parents have failed to support the School, for example by the late payment of any contribution they are making to the fees or failure to notify the School of a significant improvement in their financial circumstances.

Please note that Bursary funding may not continue if the review forms are not completed and returned, with the necessary documentation, by the requested date.

Withdrawal and/or repayment of a bursary award

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 before or during the Bursary assessment period.

In addition to the withdrawal of the Bursary, parents may be required to repay Bursary funds if the parents have knowingly or recklessly provided false, misleading or incomplete information about their financial circumstances.

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.

Confidentiality

The school respects the confidentiality of Bursary awards made to families and recipients are expected to do likewise.

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. St John's College School encourages parents to apply for support where it is felt a good case can be made for assistance. Further information on how to pursue such assistance may be obtained from:

The Educational Trusts' Forum

Website: www.educational-grants.org

The Royal National Children's Foundation

Website: www.rncf.org.uk

The Choir Schools' Association

Website: www.choirschools.org.uk

Appendix A

Conditions of Bursary Award

1. **Obligations of the Pupil:** A pupil who is the subject of an Award is required to work hard, to contribute positively to the life of the School, to be a credit to the School and to set a good example to other pupils. The pupil must adhere to the School's required standards of conduct and progress.
2. **Obligations of the Parents:** The parents are expected to support and encourage the pupil, treat members of the School community reasonably and comply with the School's standard terms and conditions. The parents are also required to pay the balance of the account by the first day of each term. Any extras above £100 to be incurred on behalf of a pupil in receipt of an award for a trip or event should be approved by the Director of Finance before a commitment is made.
3. **Obligations of the School:** The School will treat Bursary holders in exactly the same way as full fee-paying pupils, and will maintain confidentiality as appropriate regarding the holding of a Bursary award.
4. **Annual Review:** Other than an Emergency Bursary when the period is likely to be shorter, an award is normally tenable throughout a pupil's time at the School. It is, however, subject to an annual review of financial circumstances and should these change significantly from the present position, the award may be varied or discontinued.
5. **Withdrawal of a Bursary:** A Bursary may be withdrawn by written notice sent to a parent if, in the opinion of the Governors, acting in good faith, the pupil or a parent has not complied with the obligations set out in paragraphs 1, 2 and 3 above or the pupil has fallen below the required standards of conduct and progress and in the further opinion of the Governor's there has been no significant improvement following consultation with a parent and/or the pupil and a written warning. Withdrawal of a Bursary will take effect from the start of the following payment term.

Further, a Bursary may be withdrawn by written notice if the balance of the account remains unpaid 28 days after a written reminder has been sent to the parents.
6. **Repayment events:** Parents shall be required forthwith upon written notice to repay all or part of the benefits they have received under the Bursary in any of the following circumstances:
 - If the pupil has engaged in serious misconduct or has been expelled or removed for reasons of misconduct by the requirement of the Head acting in good faith;
 - In the case of the pupil being withdrawn for any reason during a school year without a term's written notice having been given;
 - If the parents have failed to inform the Director of Finance of any change in their financial circumstances within a reasonable time of such change occurring.
7. **Fees in lieu of notice:** For the avoidance of doubt, the benefits receivable under a Bursary award will not apply to any payment term for which the School has required payment of fees in lieu of notice.
8. **Terms and Conditions:** These Conditions of Bursary Award take precedence over any of the School's Terms and Conditions which are inconsistent with them but in all other respects the Terms and Conditions as amended from time to time shall apply and these Conditions of Bursary Award shall be interpreted in accordance with them. Individuals may receive Bursary support for a maximum of six years.