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Bursaries Policy and Procedures Policy Statement

The St Peter & St Paul School Trust, Brambling House, Hady Hill, Chesterfield S41 0EF

The Trustees of St Peter & St Paul School are committed to broadening access to the School by offering to eligible parents and guardians means-tested financial support with the payment of school fees. Such support is known as a Bursary and is usually awarded in the form of a discount on school fees typically up to a maximum of 30% of the cost of school fees, depending on the financial, compassionate or other pertinent circumstances of applicants. The Bursaries are awarded at 10%, 20% and 30% of the total annual school fees. Exceptions are at the discretion of the Bursary Committee. Bursary support is based on an assessment of financial circumstances. It considers capital assets as well as income, investments and savings. It also makes allowances for dependents and other relevant considerations.

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1.0 Aims

The aims of the policy are:

- To enable access to the education provided by the school is available to all children;
- To ensure that children already at the school will not be forced to leave if the members of their family responsible for fees have come upon unforeseen financial circumstances.

St Peter & St Paul School is a registered charity, which is committed to providing Public Benefit according to its obligations under the Charities Act 2006. This policy is reviewed on an annual basis in order to take in to account the latest guidance from the Charity Commission and any other relevant factors.



All Bursary applications are treated in the strictest confidence and pupils will not be made aware that they benefit from a Bursary unless informed by the parents/guardians.

2.0 The Application Process

The application process for any new bursaries starts on a need basis, on application to the school or in the Spring Term for existing bursary awards. All existing bursaries are reviewed annually in the Spring term. All applications for the following academic year, whether new or for renewal, must be received by the start of the second half term in Spring.

The Bursary Committee will endeavour to inform parents if they have been awarded a bursary by the end of the Spring Term. Bursaries may be awarded outside of this annual process, but only on rare occasions. This will be for existing pupils where unforeseen circumstances have resulted in a family becoming unable to meet that year's fees.

Parents may apply for a Bursary by writing to the Finance Officer or Bursar (who will refer the application to the School's Bursary panel). The panel will seek to establish the financial circumstances of the household and will ask the applicant family to provide full disclosure of their financial position. This information must be accompanied by full documentary evidence. Completed forms and evidence should be submitted to the Finance Officer or Bursar.

Information provided to the panel is reviewed and assessed by them. This may involve a visit to the applicant family's home by members of the panel, to ensure that any information submitted has been correctly interpreted and that the basis of the assessment is fair.

It is critical that applicants answer of all the questions carefully and in full, and documentary evidence be provided to support the application. Should any of the information disclosed in the application become inaccurate at a later date the school must be informed without delay. Failure to disclose requested information or a change in financial circumstances to the school could lead to a Bursary being withdrawn. The Bursary Committee will decline or withdraw a Bursary if it is discovered that they have been misled at any time either during the application process or whilst a Bursary has been held in previous academic years. For further information about the conditions of award, see Appendix A.

Information and recommendations from the Headteacher, the Bursar and the Finance Officer will be discussed and presented to the School's Bursary Committee.

The Headteacher will assess all applications to establish the likely level of support required in order to allow the pupil to attend the School. In addition, the Headteacher will make a recommendation based upon the benefit to the pupil of attending St Peter & St Paul School and the contribution the pupil will or is likely to make to the School. The School's Bursary Committee has the authority to make a final decision which is then communicated to the applicant family.

Please note that the decision of the School's Bursary Committee is final and there is no further right of appeal.

Should a Bursary be offered, parents are required to acknowledge agreement in writing of any conditions relating to the Bursary which they will be expected to fulfil.



3.0 Considerations in the Assessment Process

The Headteacher will consider a number of factors when making a judgement as to the justification for support and the extent of any such support. Each application is considered on its own merits. 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 any financial support it offers is well-focussed and targeted towards those most in need.

Factors considered include, but are not limited to the following:

- Suitability of the child to the School: Those judged likely to gain most from the education provision will be given priority. Pupils to whom support is offered must, in the opinion of the Headteacher, be likely to make sound progress and possess the potential to develop the quality of his or her work and benefit from participation in the wider, extracurricular activities on offer at the School. Previous school reports may be consulted for evidence of good behaviour.
- ● Financial Circumstances: The amount of the award is not influenced by the academic ability of the child, but by the extent of need. Consideration is given to the ability to improve the financial position or earning power of the family; opportunities to release capital (including investments and significant equity value in houses); in cases of divorce or separation, the contribution made by both parents; any contribution to fees or other household costs by other, wider family members; any adults unrelated to the child or from outside sources; any fees being paid to other schools (or universities) for siblings.

All awards are subject to the School's ability to fund them within the context of its overall budget and cannot therefore be guaranteed.

4.0 Other Factors

It is recognised that there may be other circumstances which could be taken into account.

These may include:

- Where a child has siblings at the School – a sibling will not be entitled to a sibling discount in addition to a bursary.
- Early payment discounts will not apply to those who have a Bursary Award.
- Where the social needs of the child are relevant (for example, the child may be suffering bullying at their present school)
- Where a parent or carer is terminally ill or unable to secure permanent employment due to poor health
- Where a separation has resulted in the child having to be withdrawn from the School at an important stage of his or her education.

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

- Frequent and/or expensive holidays
- Expensive hobbies
- New or luxury cars
- Investment in significant home improvements
- A second property or land holdings

This list is indicative but is not exhaustive.



5.0 Misleading applications

The School and its Trustees reserve the right to seek redress for historical misinformation and may inform any appropriate authorities.

6.0 School Extras

Any Bursary awarded is financial support towards fees only. All other extras, including but not exclusively: activities, uniform, school trips, peripatetic lessons of any nature, remain the responsibility of the Bursary recipient.

7.0 Review of Bursary Awards

Awards are subject to repeat testing of parental means each year and may be varied upwards or downwards or withdrawn depending on the financial circumstances of the family. Current Bursary recipients will be issued with repeat means-testing forms each year. Awards are reviewed to reflect changes in fee costs. Within overall budget funding, the School will consider applications for cases of sudden, unforeseen need where applications meriting assistance are received out of the normal cycle for the submission, scrutiny and award of Bursaries. In such cases, the sum will be set within budgetary constraints.

The School has a discretion to recommend to the School's Bursary Panel a reduction or withdrawal of an award where a pupil's progress, attitude or behaviour has been unsatisfactory, where any conditions attaching to the award have not been met or where parents have failed to support the School, for example by the late payment of any contribution they are making to the fees or poor behaviour.

8.0 Confidentiality

The School respects the confidentiality of Bursary awards made to families, and recipients (parents and pupils) are expected to do likewise. It is a condition of the Bursary that it remains confidential. Breach of this condition will automatically result in the withdrawal of the Bursary and possible reimbursement to the School.



9.0 Appendix A: Bursary Conditions of Award

1. **Grant of the award:** An award is granted at the sole discretion of St Peter and St Paul School (SPSP).
2. **Obligations of the Pupil:** The pupil who is the subject of an award is required to work hard, to contribute positively to the life of SPSP, to be a credit to SPSP and to set a good example to others. The pupil must adhere to the school's required standards of conduct and progress. These are the **Purposes of the Award**.
3. **Obligations of the Parents:** The parents are required to:
 - 3.1. Support and encourage the Pupil to achieve the purposes of the award; and
 - 3.2. Treat members of the SPSP community reasonably and to uphold the aims and the good name of the school;
 - 3.3. Promote the school in a positive light and actively participate in school events and 'Friends' events; and
 - 3.4. Comply with the school's *Terms and Conditions*.
4. **Means tested awards:** All means tested awards will be subject to annual review and the parents shall each year be required to complete a financial means questionnaire. After any annual review, SPSP reserves the right to vary the value of the award with immediate effect and will confirm the new value in writing to the Parents.
5. **Continuation of the award:** Continuation of the award is dependent upon the following conditions being fulfilled:
 - 5.1. In the case of a means tested award, the Parents satisfying the school's financial requirements each year; and/or
 - 5.2. In respect of all awards:
 - 5.2.1. The financial resources allocated by SPSP to support the award being sufficient to maintain the award; and
 - 5.2.2. It being in the financial interest of SPSP to maintain the award.
 - 5.2.3. All invoices are paid on time.
6. **Confidentiality:** The value and terms and conditions of the award shall remain confidential to the Parents and the Pupil and SPSP.
7. **Termination of the award:** The award may be terminated on one of the following grounds:
 - 7.1. **Termination on financial grounds:** the school may terminate the award on one Term's notice in writing if, in the opinion of the SPSP Trustees acting in good faith:
 - 7.1.1. The parents have not satisfied the SPSP's financial requirements under clause 4 or and clause 5.1; or
 - 7.1.2. SPSP is no longer able to continue the award under clause 5.2. The termination shall take effect from the date set out in the written notice;
 - 7.2. **Termination on the grounds of conduct:** SPSP may terminate the award by written notice sent to the Parents with immediate effect if, in the opinion of the SPSP Trustees acting in good faith, one or more of the following conditions has been fulfilled:
 - 7.2.1. The Pupil has not complied with the obligations set out in clause 2 and in the further opinion of the Trustees there has been no significant improvement following consultation with the Parents and/or the Pupil and the issue of a written warning; or
 - 7.2.2. The Parents have not complied with the obligations set out in clause 3; or



- 7.2.3. The Parents of the Pupil do not keep the value and terms and conditions of the award confidential in accordance with clause 6; or
- 7.2.4. The parents withdraw the pupil from SPSP without providing proper Notice;
- 7.2.5. The parents are in dispute with the school.

7.3. **Repayment of the award:** The Parents will be required to repay all or part of the benefits received under the award if it is terminated in any of the following circumstances:

- 7.3.1. Under clause 7.1.1 if the Parents have knowingly or recklessly provided false or inaccurate information about their financial position, all benefits received from the date on which the false or inaccurate information was supplied may be repayable; or
- 7.3.2. Under clause 7.2.1 if the Pupil has been found to have committed a serious breach or series of persistent minor breaches of discipline for which the sanction would normally be Expulsion or required Removal, up to three Term's benefits (if received) may be repayable.

The school has the right to charge interest on any outstanding award monies not repaid within any agreed timescales. Interest will be charged at 4% statutory interest rate per annum above the prevailing Lloyds Bank Plc base rate prevailing at the time.

- 8. **Cancellation and Withdrawal:** For the avoidance of doubt, the benefit receivable under an award will not apply to the Parents' liability to pay the first Term's Fees if less than a Term's Written Notice of Cancellation is given, or to any Term for which SPSP requires payment of Fees in lieu of Notice following Withdrawal without proper Notice.
- 9. **Conditions of Award:** These Conditions of Award take precedence over any of SPSP's *Terms and Conditions* which are inconsistent with them, but in all other respects SPSP's *Terms and Conditions* as amended from time to time shall apply and these Conditions of Award shall be interpreted in accordance with them.



10.0 Appendix B: Bursary Application Process

1. Parents/Carers seeking a bursary are required to complete an application form (available on request and accompanied by full documentary evidence as requested). This seeks to establish the financial circumstances of the household.
The Bursary Application form, together with the necessary documentary evidence, must be submitted to the Bursar.
2. All applications will be assessed to establish the likely level of support which will be required to allow the child(ren) to attend the School. This may involve the visiting of the parents'/carers' home to ensure that the information has been correctly interpreted and that the basis of the financial assessment has been fair.
3. A recommendation will be prepared in accordance with the School's Guiding Principles and will be presented to the School's Bursary Panel, consisting of the Headteacher, Finance Trustee, the Bursar and Finance Manager for approval. The Chair of Trustees may be involved if the Committee is split or would like a further opinion.
4. The Bursary Offer Letter (acceptance or rejection) will be sent out to applicants within one month of receipt
5. Where the Bursary application is successful, parents/carers are required to sign a letter accepting the conditions of the Bursary, acknowledging that the Bursary will be re-assessed annually.
6. Where the Bursary application is unsuccessful, applicants do not have the right to appeal the school's decision.

Date last reviewed by the Trustee Board:

A review of this policy, through the Trustee Board and the SLT, is undertaken within 1 year of the last review date.