



# The Peterborough School

## Bursary Policy

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<b>Reviewed by:</b>	Bursar
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## Introduction

The Governors of The Peterborough School are committed to broadening access to education at the School by offering to eligible parents means-tested financial support for the payment of school fees for as many pupils as possible who meet The Peterborough School's entry criteria. Such support is known as a bursary. Bursaries may be awarded in the form of a discount of up to full tuition fee remission in cases of proven need, depending on the individual circumstances of the prospective pupil and each of their parents and affordability for the School.

Bursary awards are subject to an annual review of the pupil's and their parent's financial circumstances, with fresh information being required about the pupil's parents' circumstances for every year that their child attends the school. Bursary awards may be removed or varied upwards or downwards, depending on the pupil's and parents' financial circumstances.

Awards are made on the basis of The Peterborough School's confidential scale of awards which sets out award levels in relation to the child's and each parent's financial circumstances, as amended from time to time. The scale of awards is reviewed and revised annually by the School and is approved by the Governors. Though awards are generally linked to this scale, they may be varied upwards or downwards depending on the child's and each parent's financial circumstances (e.g. their savings, investments and realisable assets as well as their income, the size of their family, any other persons dependent upon them and other factors), and affordability for the School.

Awards may also be varied upwards or downwards for compassionate or other pertinent reasons, including but not limited to a pupil's progress, attitude, attendance or behaviour; where the parents have failed to support the school or otherwise have not acted in accordance with their obligations under the school's Terms and Conditions, for example by the late payment of any contribution they are making to the fees; or otherwise in accordance with the terms of the award or the school's Terms and Conditions.

A bursary may be withdrawn in its entirety in accordance with the terms upon which such an award is made or otherwise in accordance with the school's Terms and Conditions. A bursary may also be withdrawn in its entirety if, in the opinion of the Head, the child's attendance, progress and/or behaviour (and/or the parents' behaviour or conduct (or the behaviour or conduct of one of the parents)) no longer merit the continuation of the award.

The School reserves the right to amend the way in which awards are assessed.

Requests for financial support usually fall into the following categories:

- New applicants to the School where a place has been offered but parents are unable to fund the fees and other educational expenses.
- Existing pupils where a change in the pupil's and/or parents' circumstances has resulted in difficulty in meeting fees and other educational expenses and may result in the child being withdrawn part way through a stage of their education.
- Bursary Awards to Preparatory pupils are usually made in compassionate circumstances. Requests for Bursaries in these circumstances should be made to the Bursar.



- Additionally, existing bursaries will be re-assessed in year if parents' circumstances change unexpectedly for the worse.

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.

## New Applicants to the School

### Awareness

Information provided by the School alerting parents of prospective pupils to the possibility of gaining means-tested financial support with the payment of school fees and other educational expenses is included in:

- The School's prospectus.
- The School's website.

### The Application Process

Bursaries may be made available to parents/guardians of children in the Senior School. They are awarded at the discretion of the Governors, and the Headmaster and School Bursar are responsible for the management and coordination of the process.

#### Step One

Both parents seeking a bursary are required to complete a 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 of either of the parent. Parents/guardians seeking a Bursary are required to meet with the Bursar to discuss the process and then are to complete an application form which seeks to establish the financial circumstances of the household. The form, which requests details of income and capital, may be obtained from the Bursar, and must be accompanied by full documentary evidence. The completed forms, together with the necessary documentary evidence, are to be submitted to the Bursar.

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, in the event their application for a bursary is successful, them 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 (Terms and Conditions) and require the removal of the child in such circumstances.

#### Step Two

The Bursar or their nominee assesses all applications in order to establish the likely level of support which will be required in order to allow the child to attend the school. This may involve a representative of the school visiting the parents' home(s) 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 bursar or their nominee at the school and/or provide additional supporting information as may be requested.

### Step Three

The Bursar prepares a recommendation in accordance with The Peterborough School Scale of Awards which is presented to the Headmaster for approval.

### Step Four

The parents/guardians are advised whether a Bursary offer is to be made and the size of the award.

### Step Five

Parents/guardians are then required to sign a letter accepting the place at the School and an acknowledgement agreeing to any conditions relating to the Bursary. Early withdrawal of a pupil from School will result in recovery of the whole bursary awarded unless extenuating reasons can be provided.

## The Case for Assistance

The Headmaster and Bursar 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

In assessing a child's suitability, attention will be given to the academic assessment result of each applicant, but potential will also be considered, as well as actual achievement. Bursary funds are limited and those judged most suitable will be given priority as those likely to gain most from the educational provision. Each pupil to whom support is offered must, in the opinion of the Head, be likely to make sound academic progress following admission and possess the potential to develop the quality of their work and benefit from participation in the wider, extra-curricular activities on offer at the School. In normal circumstances, each applicant should meet the School's normal academic requirements. Previous school reports will be consulted for evidence of good behaviour.

### Financial Limitations

The amount of the Bursary award is not influenced by the level of the academic ability of the child but by the extent of 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 the 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 grants are well focused and so, as well as current earnings, other factors which will be considered in determining the necessary level of grant will include:

- 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.
- In cases of separation, the contribution made by the absent parent.
- 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 the School's grant will take into account this outgoing.
- 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.
  - New or luxury cars.
  - Investment in significant home improvements.
  - A second property/land holdings.

### Other Factors

It is recognised that, in addition to academic ability and financial constraints, there may be other circumstances which should be considered. These include:

- Where a child has siblings at the School.
- Where the social needs of the child are relevant (e.g. may be suffering from bullying at their present school).
- Where a parent/guardian is terminally ill or is unable to secure permanent employment due to poor health.
- 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.

### Existing Pupils – Change in Family Circumstances

Within overall budget funding, the school will in normal circumstances set aside each year a hardship fund, for cases of sudden, unforeseen need or where applications meriting bursary assistance are received out of the normal calendar cycle for bursaries. This sum will be set within budgetary constraints. Parents with a child at the school whose financial circumstances suddenly change may apply for a hardship award to the [head][bursar], explaining their situation and using the forms at Annex A. Such awards are subject to the availability of funding and cannot be guaranteed.

If parents continue to require financial support in subsequent years, they will be required to submit repeat means-testing forms in the same way as other bursary holders.

### 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 at the beginning of March each year for return by the end of the month. For those previously in receipt of Bursaries, the Headmaster, has the discretion to reduce or withdraw an award not only where a pupil's progress, attitude or behaviour has been



unsatisfactory but also where the parents/guardians have failed to support the School, for example by the late payment of any contribution they are making to the fees.

Bursary holders will either complete a full bursary re-assessment or a simplified process that requires basic financial information. The simplified re-assessment also asks Bursary holders to confirm whether or not their income has changed by 10% since their last assessment. The full and simplified bursary assessments will be conducted as follows:

Year 6 and New Starters	Full bursary assessment	Ahead of starting Y7
At the end of Y7	Full bursary reassessment	Ahead of starting Y8
Y8	Simplified bursary assessment	Ahead of starting Y9
Y9	Full bursary reassessment	Ahead of starting Y10
Y10	Simplified bursary assessment	Ahead of starting Y11
Y11	Full bursary assessment	Ahead of starting Y12
Y12	Simplified bursary assessment	Ahead of starting Y13

### 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. The Peterborough School encourages parents/guardians 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 Bursar.