

Charitable Objects of St. Catherine's School - The Objects for which the Company is established are to promote and provide for the advancement of education by providing, conducting, governing, carrying on and maintaining in the United Kingdom, or elsewhere, a boarding or day school or schools for girls in which the teaching shall be in accordance with the principles of the Church of England.

St Catherine's School, Bramley



MEANS TESTED BURSARIES AND HARDSHIP AWARDS WHOLE SCHOOL POLICY

The Whole School refers to all staff and students in the St. Catherine's Preparatory and Senior Schools which includes: the Early Years/Foundation Stage (EYFS), Pre-Prep School (Key Stage 1), Prep. School (Key Stage 2); Middle School (Key Stage 3); Senior School (Key Stage 4) and the Sixth Form (Key Stage 5).

This policy was introduced in December 2008 to formalise the distribution of bursaries which had hitherto been awarded and administered by the Bursar and Headmistress. It was written in line with new requirements following the Charities Act 2006. Following the publication of the revised ISI Handbook (second cycle) Regulatory amendments were made in August 2009 and June 2012, June 2013 and June 2014. This edition was reviewed in June 2015.

General

The Governors of St Catherine's School are committed to broadening access to the School by offering to eligible parents/guardians means-tested financial support with the payment of school fees. Such support is known as a bursary and may be awarded in the form of a discount of up to 100% on tuition fees payable, plus some appropriate extras, depending on the financial, compassionate or other pertinent circumstances of applicants.

Bursary awards are entirely subject to the Governors' discretion. Repeat testing of parental means will take place, during January/February each year, and bursaries may be varied upwards or downwards, depending on parental circumstances. New forms must be submitted upon request each Spring Term. Awards are made on the basis of the St Catherine's School Scale of Awards, which is reviewed and revised annually by the Business Manager and School Accountant to reflect any changes in fee costs. Actual awards are generally tied to the scale but may be varied upwards or downwards depending on individual parents'/guardians' circumstances (e.g., their savings, investments and realisable assets, as well as their income, the size of their family, any other persons dependant upon them and like factors), compassionate or other pertinent considerations.

Requests for financial support usually fall into three categories:

- Bursary Applications. New applicants to the School at 7+, 11+ or Sixth Form where a place may be offered but parents/guardians are unable to fund the tuition fees.
- Hardship Awards. Existing pupils where a change in parents'/guardians' circumstances has resulted in difficulty in meeting tuition fees and may result in the child being withdrawn part way through a stage of education. Hardship awards would therefore typically be awarded to see the pupil through to the end of the next academic year from age 7 to 13 to provide parents the time to select another school, or to cover to the end of the two GCSE years or Sixth Form.
- New or existing pupils where the School's boarding proviso would prove especially beneficial. These may be funded as a bursary or as a hardship award.

Bursary Applications for new applicants to the School for 7+. 11+ or Sixth Form

Awareness Information provided by the School alerting the parents/guardians of potential pupils to the possibility of gaining means tested financial support with the payment of schools fees is included in:

- The School prospectus/Annual information Booklet

- The School website
- The local press by means of advertisements

The Initial Application Process

Bursaries may be made available to parents/guardians of children entering the School at 7+, 11+ or into the Sixth Form of St Catherine's School (see the School's Admissions Policy). They are awarded at the discretion of the Governors' Bursaries and Hardships Awards committee: this usually consists of the Business Manager, School Accountant, Head of Boarding, Head of Sixth Form and a nominated Governor. The Business Manager is responsible for the management and coordination of the process.

- Step One Parents/guardians asking for a bursary are required 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 found at Appendix A and must be accompanied by full documentary evidence. This form may be completed by hand or electronically using the word document which can be found on our website under Admissions. The completed forms, together with the necessary documentary evidence, are to be submitted to the Business Manager no later than the **last day of October** in any year for bursaries to start the following September. Late applications may be considered but depend on the availability of grants and parents/guardians are advised that availability is very likely to be limited.
- Step Two – November The Business Manager 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 and prepares a recommendation.
- Step Three – By the end of November The Governors' Bursaries and Hardship Awards Committee meets to assess all applications and agrees levels of support or the need for further information. This may involve the two members of the Committee visiting the parents'/guardians' home to ensure the information has been correctly interpreted and the basis of the financial assessment has been fair.
- Step Four - January After the relevant Entrance Examination have been marked the parents/guardians are advised whether their child is to be offered a place at the School and of the outcome of the application for a bursary.
- Step Five – By the end of February. If a place at the School is offered and a bursary awarded, parents/guardians are then required to sign a letter accepting the place and an acknowledgement agreeing to any conditions relating to the bursary which will include the stipulation that any fees due from parents must be paid by Direct Debit. All bursary places should be acknowledged and accepted/declined by mid February to allow for any unaccepted funds to be redistributed to other applicants. Parents will also be asked at this stage to declare if they remain on the waiting list for any places at other schools/other awards elsewhere.

The Case for Assistance

The Awards 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 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. Academic ability will be tested by means of the appropriate entrance examination. Bursary funds are limited and those judged most suitable will be given priority as those likely to gain most from the educational provision. A contribution to the extra-curricular programme will be expected. 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 her work, and benefit from participation in the wider, extra-curricular activities on

offer at the School. Applicants must meet the School's normal academic requirements. Previous school reports will be consulted for evidence of good behaviour and a written reference will be requested.

- **Financial Limitations** 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 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 dependants, or the requirements of his/her 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 (or universities) the School's grant will take into account all these outgoings.
 - 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, luxury or superfluous 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 the social needs of the child are relevant (e.g., may be suffering from bullying at her 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.
 - Priority will always be given to an applicant who can walk to school or lives within the School's normal catchment area or where the availability of a boarding place would enable the parent(s) to pursue a full working life.

Hardship Awards for existing Pupils - Change in Family Circumstances

Leavers' Parents are asked each year to donate to the Hardship Fund which the School then enhances for cases of sudden, unforeseen need or where applications meriting bursary assistance are received out of the normal calendar cycle for bursary submission, scrutiny and award. Parents/guardians with a child at the School whose financial circumstances suddenly change may apply to the Business Manager for a Hardship Award, explaining their situation and using the forms at Appendix A. **Such awards are subject to the availability of funding and all the conditions mentioned in this**

document and cannot be guaranteed. Applications may be made at any time of the school year and Hardship awards will generally be granted to see the pupil to the end of the next academic year from age 7 to 13 to provide parents the time to select another school, or to cover to the end of the two GCSE years or Sixth Form.

Transfer from Prep School to Senior School

The parents of these girls receiving a bursary who are in L3 having had a 7+ bursary will be contacted in the previous summer and reminded that a new bursary application will be required by the last day of October if they intend to transfer to the Senior School.

For those previously in receipt of bursaries, the Head and Business Manager, in making their joint recommendation to the Governors' Awards 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/guardians have failed to support the School, for example by the late payment of any contribution they are making to the fees.

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 Catherine's 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 Business Manager
St Catherine's School
Bramley
Guildford
Surrey
GU5 0DF
Email: business.manager@stcatherines.info
Website: www.stcatherines.info

Appendix A - Confidential Statement of Financial Circumstances

Signature of Senior School Headmistress:

Signature of Preparatory School Headmistress:

Date: