



## **BURSARY POLICY**

### **Introduction**

The Governors of Sir William Perkins'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 these may be awarded in the form of a discounts to tuition fees payable, depending on the financial or other pertinent circumstances of applicants. The School aims to direct a proportion of its fee income annually into bursary assistance, in order to enable those who would not otherwise be able to benefit from the School to do so. The proportion available to be directed into bursary assistance will be decided annually.

All bursary awards are subject to repeat testing of parental means each year and may be varied upwards or downwards, depending on parental circumstances. Bursary assistance cannot be guaranteed for the entire tenure of the student's time at the School. Awards are subject to an independent review and take into account a range of factors (e.g. net income, expenditure, net assets including all properties, savings, investments and realisable assets, size of family, other dependents and other such factors).

NOTE: SWPS is fully committed to ensuring that the application of this Policy is non-discriminatory, in line with the UK Equality Act (2010). Further details are available in the School's Equal Opportunities Policy.

### **1. Requests for Support**

Requests for financial support usually fall into two categories:

- New applicants to the School for Y7 and Sixth Form (Foundation Bursaries);
- Existing students where a change in parents'/guardians' circumstances has resulted in difficulty in meeting tuition fees and may result in the student being withdrawn part way through a critical stage of education (Hardship Bursaries).

#### **1.1 New Applicants to the School**

##### **1.1.1. Awareness**

Information provided by the School alerting the parents/guardians of potential students to the possibility of gaining means-tested financial support with the payment of school fees is included as appropriate in:

- The School prospectus;
- The School website;
- Letters to feeder schools;
- The local press by means of advertisements.

##### **1.1.2 The Application Process**

Perkins Foundation Bursaries of tuition fees may be made available to parents/guardians of students entering the School. Other than in exceptional circumstances, support will be focused

on students entering the School at Year 7 and entering into the Sixth form. These bursaries are awarded at the sole discretion of the School based upon the provisions of this policy. The Head and the Director of Finance & Operations are responsible for the management and coordination of the process. In exceptional circumstances, families awarded substantial bursaries may also request consideration of proportionate assistance with uniform, external examination fees, school trips considered a necessary part of the curriculum and lunches where necessary.

- Step One. Parents/guardians seeking a Foundation Bursary are required to complete an application form which sets out the financial circumstances of the household. The form, requests full details of income, expenditure and assets, and must be accompanied by full documentary evidence in order to progress with the application. The completed forms, together with the necessary supporting documentary evidence, are to be submitted to the Director of Finance & Operations according to published deadlines. Late applications will not be considered.
- Step Two. The Director of Finance & Operations through its independent representative assesses all applications in order to establish what level of support the family are entitled to receive. This may involve the Director of Finance & Operations, or their appointed representative, requesting additional documentation or visiting the parents'/guardians' home to ensure that information has been correctly interpreted and the basis of the financial assessment has been fair.
- Step Three. The Director of Finance & Operations prepares an award recommendation which is considered with the Head and a joint recommendation is then reached.
- Step Four. The Governors are briefed at each relevant Governors' meeting on the statistics of total bursaries allocated. Individual bursary awards are not usually discussed to preserve the confidentiality of the families concerned.
- Step Five. Parents/guardians are ordinarily advised of the result of their Bursary application at about the same time as they are informed whether their child is to be offered a place at the School.
- Step Six. Parents/guardians are then required to sign a letter accepting the place at the School and an acknowledgement agreeing to any terms and conditions relating to the bursary award. In particular it should be noted that a direct debit mandate will need to be in place for the payment of the termly fee bill and in order for the bursary award to take effect. The account cannot fall into arrears with the School.

Parents/guardians offered very high levels of bursary will be asked to confirm their acceptance of the place offered promptly, in advance of the normal date for acceptance. This is so that, if the offer is not accepted, the bursary funds can then be offered to another family.

### **1.1.3 The Case for Assistance**

The funds available for bursaries are limited and so not all applicants will be successful. Typically, only a small number of bursaries are able to be offered during the Year 7 entrance cycle. A number of factors are considered when making the judgement as to the justification for support, and the extent of such support. In the main, the prospective student's suitability for the School is the first consideration in granting support.

- **Suitability.** In assessing 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 student 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 usual academic requirements. Reports from previous schools will also be taken into account.
- **Financial Limitations.** The amount of the bursary award itself is not influenced by the level of the academic ability of the candidate but by the extent of need. Each case is means-tested and awards are made accordingly, subject to the School's ability to fund these within its overall budget and the level of funds allocated for bursaries. 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 larger houses.
  - Availability of savings/liquid funds
  - 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 student or by outside sources.
  - Where fees are being paid to other schools (or universities) the School's grant will take note of these outgoings.
  - The School considers that the following would not be consistent with the receipt of a material bursary:
    - Frequent or expensive holidays.
    - New or luxury cars.
    - A high-value only/main residence, even with a large mortgage.
    - Investment in significant home improvements.
    - A second property/land holdings.
    - Significant extra-curricular/private tutoring
  - That students with bursaries would be expected not to participate in expensive discretionary trips or discretionary extra-curricular activities without consultation with the Director of Finance & Operations. Any breach of this term could result in the cost of such trip being deducted from the Bursary award.
- **Ease of Access to the School.** Priority will be given to local families in line with the intentions of the School's founder and the School's Charitable Objects.
- **Other Factors.** It is recognised that, in addition to academic potential and financial constraints, there may be other circumstances which should be considered. These include:

- Where a candidate has siblings at the School.
- Where the pastoral or social needs of the candidate are relevant (e.g. if they are 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 may result in the pupil having to be withdrawn from School, adding to the stress of coping with the situation.

### **1.2 Existing Students - Change in Family Circumstances**

Within overall budget funding, the School will in normal circumstances look to be able to grant Hardship bursaries, 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. The funds available for such bursaries will be set within budgetary constraints. Parents/guardians with a student at the School whose financial circumstances suddenly change may apply for a bursary to the Director of Finance & Operations, explaining their situation and using the forms available from the Director of Finance & Operations' Department. Such awards are means-tested as with Foundation Bursaries and are also subject to the availability of funding and cannot be guaranteed. Typically, applications take up to 8 weeks to process subject to full supporting evidence being submitted upon first application. Hardship bursaries will primarily be focused on students in higher year-groups who are facing public exams, rather than those who have only recently joined the School.

### **2. Bursary Review**

All bursary awards are subject to repeat mean-testing of the family's financial circumstances either termly or annually and awards may be varied upwards or downwards with immediate effect following the review. Current bursary holders subject to an annual review will be issued with repeat means-testing forms during the Spring term. For those previously in receipt of bursaries, the Head and Director of Finance & Operations have the discretion to reduce or withdraw an award not only where a student'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.

If a family's circumstances improve during the year so that they do not require the same level of support, they are expected to inform the Director of Finance & Operations so the bursary can be adjusted and monies redirected to help others as necessary.

Any bursary awarded will be withdrawn and the value of any amount of the previously credited will become repayable to the School if false/incorrect information has been provided during your application whether fraudulently, knowingly or recklessly. In addition, failure to cooperate fully with the School in providing the necessary transparency will result in the bursary award being withdrawn.

### **3. Confidentiality**

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

### **Monitoring and Review**

The Governing Body is ultimately responsible for the effective oversight, review and amendment of this policy and understands its legal obligation to do so.

This policy will be reviewed and updated annually by the Head and Director of Finance & Operations, or as events or legislation requires.

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| Next scheduled review date: Sept 2025 | Last reviewed: Sept 2024 |
| Key updates in this version: Nil      | Minor amendments         |