

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 Chief Operating Officer and Headmistress. It was written in line with new requirements following the Charities Act 2006. Amendments were made in August 2009, June 2012, June 2013, June 2104, June 2015, March 2018, November 2021 and this edition was reviewed in Summer 2024.

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% of tuition fees payable and, where appropriate, an allowance for educational extras (such as school uniform, iPad for digital learning, or school trips), depending on the individual circumstances of applicants. The School also makes Hardship Awards in certain circumstances – see further below.

Bursary Awards are entirely subject to the Governors' discretion. Repeat testing of parental means will take place, during January/February each year after an Award has been made, and Bursaries may be varied upwards or downwards, depending on parental circumstances. Awards are made on the basis of the confidential St Catherine's School Scale of Awards, which is reviewed and revised annually by the Bursaries and Hardship Awards Committee. Actual Awards made are generally tied to the Scale but may be varied upwards or downwards depending on individual parents'/guardians' 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 like factors). Awards may also be varied upwards or downwards for compassionate or other pertinent considerations, including, but not limited to, a pupil's progress, attitude, attendance or behaviour, or the parents' support or otherwise of the school. In particular, awards may be varied where parents 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). New forms providing details of parents'/guardians' circumstances must be submitted in a timely manner upon request each Spring Term.

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 Headmistress, the pupil'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 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 Applications. 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 key 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 and can be made at any point in the academic year.
- Out of Year Applications. New or existing pupils where the School's provision would prove especially beneficial. These may be funded as a Bursary or as a Hardship Award and can be made at any point in the academic year.

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

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 school fees is included in:

- The School's prospectus/ Annual Information Booklet.
- The School's website.

The Initial Application Process

Bursaries may be made available to parents/guardians of children already registered to enter 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 Hardship Awards Committee: this usually consists of members of the Senior Management Teams of both Prep and Senior Schools and one or more nominated Governors.

- Step One: Both parents/guardians seeking a Bursary are required to complete an application form which seeks to establish the financial circumstances of the household. In the event that the 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 parent. The form, which requests details of income, savings 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 <https://www.stcatherines.info/admissions/bursaries-and-scholarships>
- The completed forms, together with the necessary documentary evidence, are to be submitted to businessteampa@stcatherines.info no later than the **final Friday prior to half-term of the Autumn Term** (please refer to our website for term dates) 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.
- 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 that their application for a bursary is successful, to update the School should 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 the Award in accordance with its Terms and Conditions.

- Before an application can be accepted, the family is expected to have visited the Prep or Senior School by participating in a tour or by attending a Prospective Parents' Morning – a place on these can be booked via the school's website <http://www.stcatherines.info/> - and to have had a personal meeting with a member of the Senior Management Team in either School.
- Step Two – November - The Chief Financial Officer 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 which may include financial paperwork not already provided. This will involve 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. The pupil who will attend the School must be present for that visit though will not, of course, be involved in the financial discussions. The School reserves the right to conduct this home visit via Zoom.
- Step Four –December After the relevant Entrance Examinations have been marked, the parents/guardians are advised whether their child is to be offered a place at the School. Any Bursary offered will be confirmed at this time and parents will be asked to accept the place by a date in mid-February.
- Step Five – 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. Frank and open dialogue is encouraged at this stage. It is in the interests of all concerned that the girl is placed in the right school for her.

All personal data processed in connection with the school's arrangements for bursaries will be processed in accordance with the School's Confidentiality & Privacy Policy which is available on the School's website and is otherwise available upon request.

The Case for Assistance

The Awards Committee will consider a number of factors when making the judgment 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. 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. A contribution to the extra-curricular programme will be expected. A St. Catherine's education is about developing a rounded young woman at the end of her schooling in the Upper 6th.

- One Award Per Family - At any one time the School will support a maximum of one child per family.
- Financial Limitations - Each case is a financial partnership between the School and a family and 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 (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 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 property assets.
 - In cases of parents who are divorced or separated, the contribution that is being made or could be made by both parents, regardless of who the child lives with, and based on the principle that liability for the fees is joint and several. This means that the School may consider the financial circumstances of each parent separately and together, treating each parent's household separately.
 - Contribution to household costs by other, wider, family members, any adults unrelated to the child or by outside sources.
 - Where fees are already being paid to St. Catherine's.
 - Any fees which are being paid to other schools (or universities)

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.
 - Significant equity in property
 - Significant savings
 - Failure to honour school fee payments to the School or other schools
- 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 critically or terminally ill or is unable to secure permanent employment due to poor health or incapacity.

- Where a separation has resulted or is likely to result 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.

Annual assessment of bursary award percentage

All bursary recipients are written to in January each year and asked to resubmit their application with updated financial information and supporting documents. The bursary award is then reassessed and parents are advised of the outcome of the review.

Change of Circumstances

We ask that all our bursary recipients notify us immediately during the year if they experience any changes to their financial situation which may affect the calculation and assessment of any bursary award.

Hardship Awards for existing Pupils - Change in Family Circumstances

Leavers' Parents are asked each year to consider making a donation to the Hardship Fund – perhaps their initial deposit which is returned to them when their child leaves school. This fund enables the School to support 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 Chief Financial Officer 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 policy 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. Recipients of Hardship Awards are asked to consider, should their financial circumstances change for the better at some point in the future, making a donation back to the Hardship Fund to allow future families to be able to benefit from the same type of financial support they themselves have received.

Out of Year Awards for new or existing Pupils

These are Awards for parents/guardians with a child for whom the School's provision would prove especially beneficial. These may be funded as a Bursary or as a Hardship Award and can be made at any point in the academic year. An application can be made to the Chief Financial Officer for an 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 policy and cannot be guaranteed.**

Transfer from Prep School to Senior School

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

For those previously in receipt of Bursaries, the Headmistress and Chief Financial Officer, in making their joint recommendation to the Governors' Bursaries and Hardship 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 or failure to support the School's ethos, protocols and rules.

Entry to Sixth Form

The parents of those girls receiving a Bursary who are in U5 having had a 11+ Bursary will be contacted in the Autumn Term and reminded that a new Bursary application will be required by the last day of October if they intend to apply to move into the Sixth Form.

As noted above, for those previously in receipt of Bursaries, the Headmistresses and Chief Financial Officer, in making their joint recommendation to the Governors' Bursaries and Hardship 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 or failure to support the School's ethos, protocols and rules.

Confidentiality

The School respects the confidentiality of Awards made to families and recipients are expected to do likewise. Failure to do so may jeopardise any Award in subsequent years.

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 who, due to a change of circumstances, may be unable to remain. St Catherine's encourages parents to apply for support where it is felt a good case can be made for assistance. Parents may wish to look at The Educational Trusts' Forum (www.educational-grants.org), which details a number of such member trusts.

Appendix A - Confidential Statement of Financial Circumstances

Signature of Senior School Headmistress:

Signature of Preparatory School Headmistress:

Date: