



Lichfield Cathedral School

# Means-Tested Bursaries and Scholarships Policy

September 2017

# Means-Tested Bursaries

## General

### 1. **Opportunity**

The Governors of Lichfield Cathedral School (LCS) wish to ensure that the opportunity for children to benefit from the education offered by the School is not unreasonably restricted by the parents' ability to pay fees. Provision for financial assistance is made within the School's budget and an award made from this provision, known as "a Bursary", may be made in the form of a remission of up to 100% of the tuition fees payable, depending on the financial, compassionate or other pertinent circumstances of applicants.

### 2. **Limitations**

The Governors intend that LCS provides the best possible education, consistent with affordability, but unlike many independent schools there are no endowment funds available to provide additional financial support. Bursaries therefore must be provided out of fee income and it is regretted that funds available for the above awards are very limited, to the extent that the Governors are seldom able to meet the full demand. It is unlikely that awards will be available to families with an income exceeding that stated in paragraph 9 below.

### 3. **Communication**

LCS provides information on the existence and accessibility of potential bursary awards as follows:

- a. The School website.
- b. The School prospectus.
- c. The local press by means of advertisements.
- d. The Governors' annual report.

### 4. **Means Testing**

Assessments are normally based on gross income (including superannuation contributions, bonuses and incentives, allowances, P11D items, etc.) before the deduction of tax and NI. Taxable benefits will be counted as income but tax-free benefits will be excluded from the calculation. The potential for income from savings, investments and equity may also be applied. An adjustment may be made for family size and circumstances, and other dependants, and consideration will also be given to compassionate or other pertinent factors. Following the initial award, a Bursary will be subject to repeat testing of parental means each year and may be varied upwards or downwards.

### 5. **Priorities**

Priority will normally be given to children entering Years 7 to 12. Bursary awards for children entering during Pre-School or primary years will only normally be considered in cases of extreme hardship.

## The Case for Assistance

6. A number of factors will be considered 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.

### 7. **Academic Record**

In assessing a bursary application, attention will be given to the child's academic assessment, but potential will also be considered as well as actual achievement. Each applicant must meet the School's normal academic requirements and any 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 his or her work. A considerable degree of commitment and effort will be required and a good record of effort and behaviour in previous schools will be essential. Since LCS is a

school of high academic standards, it will normally follow that those achieving the highest results in the entrance examinations will be prioritised. Consideration will also be given to how a pupil might benefit from participation in the wider, extra-curricular activities on offer at the School. However, any constraints on earlier achievement, such as illness or lack of opportunity, will also be considered.

#### **8. Financial Limitations**

The amount of financial support offered will be based on financial need. Each case will be assessed on its own merits and awards are made accordingly, subject to the available funding and the level of demand. It is recognised that judgements about what sacrifices a family should make to pay school fees will be personal and the scale of awards is therefore not rigid. 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:

- a. 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.
- b. 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.
- c. The costs of any siblings at the School.
- d. In cases of divorce or separation, the contribution made by the absent parent (unless otherwise directed by a Court Order).
- e. Contribution to household costs by other, wider, family members, any adults unrelated to the child or by outside sources.
- f. Where fees are being paid to other schools or universities.

#### **9. Possible Preclusions**

The award of a bursary is specifically to allow a child whose parents may not otherwise be able to afford tuition fees to benefit from a place in the School. The award is intended for those with no financial choice and who otherwise could not afford the tuition fees; it is not intended to facilitate other options or support a pre-existing lifestyle. The Governors therefore consider that the following would not be consistent with the award of a bursary:

- a. Household income in excess of £40,000.
- b. Substantial savings or investments.
- c. Mortgages on excessively expensive properties.
- d. Substantial equity in homes.
- e. Frequent or expensive holidays.
- f. New or luxury cars.
- g. Investment in significant home improvements.
- h. A second property or land holdings.
- i. A directorship or shareholding or equitable interest of a business with substantial profits.

#### **10. 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:

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

11. Within overall budget funding, the School will in normal circumstances make provision to support cases of hardship, for cases of sudden and unforeseen need. Parents/guardians with a child at the School whose financial circumstances suddenly change may apply to the Bursar for assistance explaining their situation and completing a Bursary Application, available from the Bursary or Registrar.
12. Such awards are subject to the availability of funding and cannot be guaranteed. Furthermore, the Governors do expect parents to make reasonable arrangements to effect insurance cover, particularly through the critical stages of their child's education.

## **Annual Review**

13. In order that limited funds may be released when appropriate to meet the needs of other families, parents whose children are in receipt of bursary awards are required to bring to the School's attention any material improvement in their financial circumstances.
14. 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 early in the Trinity Term each year. Failure to complete and return the forms by the due date may lead to the loss of the Bursary award. An award may be reduced or withdrawn:
  - a. if a pupil's progress, attitude or behaviour has been unsatisfactory
  - b. where parents are failing to support their child at the school
  - c. if parents fail to support the school in educating their child
  - d. failure to make full or timely payment of the contribution to fees due by parents
  - e. if there is misrepresentation on the application form or annual return.

## **The Application Process**

15. Bursaries may be made available to parents/guardians of children entering any year group of the school. Application can only be made once a place at the School has been offered.
16. Bursaries are awarded at the discretion of the Governors. The Head Teacher and the Bursar are responsible for the management and coordination of the process and both will work closely with the Governors.
17. Step One. Following the offer of a place at the School, parents/guardians seeking a bursary are required to complete an application form which seeks to establish the financial circumstances of the household. The form (Confidential Statement of Financial Circumstances), which requests details of income and capital, can be obtained from the Registrar or Bursary and must be accompanied by full documentary evidence. The completed forms, together with the necessary documentary evidence, are to be submitted to the Bursar according to the timetable detailed in Appendix 1.
18. Step Two. The Bursar assesses all applications to establish the overall demand for support and assess the likely level of support required for each applicant. This may involve the Bursar, or his representative, visiting the parents/guardians' home to ensure the information has been correctly interpreted and the basis of the financial assessment has been fair.
19. Step Three. Based on the academic assessment, the Head will provide the Bursar with a prioritised list of applicants meriting an award.

20. Step Four. The Bursar will work down the list in order of priority and will make offers of bursaries to parents/guardians until the budgeted funds are fully allocated. If a home visit is deemed appropriate but has not been possible prior to the offer, such offers may be provisional upon such a visit. All bursary offers will be dependent upon the verification of the information given in the application form.
21. Step Five. Parents/guardians are then required to sign a letter agreeing to any conditions relating to the bursary.
22. Step Six. If any offers of bursary awards are rejected prior to the closing date, the funds will be re-allocated to other parents.

### **Confidentiality**

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

### **Other Sources of Bursary Assistance**

24. In addition to the School funding bursaries, there are a few educational and charitable trusts which provide assistance with tuition fees. In the majority of cases, such assistance is restricted to children who are already attending a fee-paying school and due to a change of circumstances may be unable to remain. Grants are often restricted to allowing a child only to complete a current key stage of education such as GCSE or A Level courses. Parents/guardians might wish 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 Educational Grants Advice Service of the ISC, who should be contacted before approaching individual charities. It is often possible for the adviser to direct enquirers to charities that are not members of the Educational Trusts Forum.

Educational Grants Advice  
Independent Schools Council, c/o Royal National Children's Foundation  
Sandy Lane, Cobham, Surrey KT11 2ES  
Tel 01932 865619

## **Scholarships**

### **General Terms and Conditions**

25. On entry to Year 7 (11+), Year 9 (13+) and Sixth Form (16+), current pupils and new applicants may be assessed for a scholarship to recognise academic, sporting, musical or artistic achievements and/or potential. External and internal applicants will be assessed according to the methodology described in Appendix 1. All scholarships are awarded at the absolute discretion of the School.
26. Academic, Art, Drama, Music and Sport Scholarships are awarded for the benefit of individual pupils to encourage excellence across a range of academic and co-curricular activities in keeping with the aims of the School.
27. All 11+ candidates will automatically be considered for an Academic Scholarship but there are separate assessment processes for all other types of Scholarship (as detailed in Appendix 1).
28. In the event of there being no outstanding candidates in a particular category, funds may be allocated to another category of award or not awarded for that academic year.

29. Scholarship awards are made without regard to parental income. The award may take different forms depending on the type of scholarship (e.g. the award may be honorary; Music Scholars may receive free music lessons). If the award takes the form of a fee remission, the amount will typically be between 5% and 10%, although larger awards may be possible if resources are available. A number of Exhibitions may also be awarded at a value of 5% fee remission per year.
30. All Scholarships may be supplemented by Bursary funding up to 100% remission of fees.
31. All non-academic Scholarship candidates will also be required to demonstrate sound academic progress and a record of consistent effort and good behaviour.
32. Pupils awarded Scholarships will retain them throughout their careers at the Cathedral School subject to good performance in all aspects of school life. Performance will be reviewed at least annually and parents will be notified if there is any danger of the award being withdrawn. One term's notice of the withdrawal of an award will always be given.
33. Because the Cathedral School is investing heavily in their education, all Scholars are expected to show leadership and loyalty to the school. Art Scholars are expected to continue studying art up to and including GCSE level. Art, Drama, Sport and Music Scholars are expected to participate fully in all aspects of school life and therefore school practices, rehearsals, events and fixtures must be prioritised over external commitments, events or club matches.
34. Awards are made on the understanding that a child will spend his or her entire senior school career at the Cathedral School and he/she will leave at the end of the Upper Sixth year (Year 13). If, without agreement, a Scholar is withdrawn by his/her parents from the School to attend another school, the Cathedral School will be entitled to recover the total scholarship fee remission which has been received during the child's whole Cathedral School career.
35. Scholarships will be withdrawn from those pupils whose fee accounts are in arrears.
36. Awards are made on the condition that pupils understand their obligations to the school and that parents support the school. It is a condition of any offer that the value of an award must remain strictly confidential between parents and the school; pupils should not be told the actual percentage. On accepting a Scholarship, parents are required explicitly to state that they accept these Terms and Conditions.

# Appendix 1: Scholarship Assessment

The scholarship assessments for entry to Year 7 (11+), Year 9 (13+) and Year 12 (16+) in September 2018 will take place on **Saturday 11 November 2017**. The scholarships are open to current Cathedral School pupils and external applicants. Details of the assessments and application forms are available on the School's website.

## Academic Scholarships

Academic Scholarships are awarded to pupils who will bring distinction and commitment to the academic life of Lichfield Cathedral School. The assessments for external candidates at each entry level are as follows:

11+/Year 7	Complete one English paper (1 hour) and one Maths paper (1 hour)
13+/Year 9	Complete one English paper (1 hour) and one Maths paper (1 hour)
16+/Year 12	Complete one Maths paper (1 hour) and one General paper (1 hour)

All candidates will be interviewed by the Headmistress and a report will be requested from the Head of the candidate's current school.

The academic record of current LCS pupils applying for an Academic Scholarship will be assessed by the Deputy Head in discussion with the Heads of Department.

## Art Scholarships

Art Scholarships are awarded based on a practical assessment and evidence contained in a portfolio. This should consist of a wide range of art activities and techniques, focused primarily around the activities of drawing and painting. Candidates will be asked to sit a one hour timed exercise to test observational and drawing skills – all materials will be provided. Candidates will be interviewed by the Head of Art and Design.

## Drama Scholarships

Drama Scholarships are awarded to those pupils who will bring distinction and commitment to performing arts at Lichfield Cathedral School. This could entail offering excellence in one area such as a performer, director or designer, or an outstanding all-round contribution to the Drama department at the Cathedral School. Drama Scholarships are awarded based on a practical assessment and evidence contained in a portfolio. The practical exercise, including the performance of a prepared piece and an improvisation, will take the form of a workshop with all candidates. Candidates will also be interviewed by the Head of Drama.

## Music Scholarships

The assessment for Music Scholarships is mainly practical and the Director of Music will look for potential as well as for existing achievement. Candidates will be expected to:

- Perform two pieces on their 1st instrument (one of which must be accompanied)
- Perform one piece on a 2nd instrument (preferably accompanied) and 3<sup>rd</sup> instrument, if applicable
- Perform some sight reading based on the standards mentioned above
- Complete some aural test based on the above standards
- Complete a viva voce

Candidates will be expected to be performing currently at the following standard (ABRSM or equivalent):

Year 7/11+: Grade 3

Year 9/13+: Grade 5

Year 12/16+: Grade 7

## Sport Scholarships

Sport Scholarships are awarded to those who will bring distinction and commitment to Lichfield Cathedral School through sport and their contribution to the overall community. Candidates will be assessed against the evidence of their current performance and future potential. Their physical and technical capabilities, attitude and life skills are assessed through a combination of references, interview with the Head of Sport, aptitude tests, physical competency and sport specific trials. For external candidates, tests or trials may be conducted during a taster day visit to the Cathedral School, or the Head of Sport may visit the candidate at their normal training facility.