



## St Michael's Church of England Preparatory School

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# Bursary Policy for Public Benefit and Charitable Support

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St Michael's School

February 2021

Policy: Bursary Policy  
This Edition: March 2021  
1<sup>st</sup> Edition: November 2015  
Author: DRH

# St Michael's School

## Bursary Policy

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### Authority and Circulation

1. This policy has been authorised by the Governing Body of St Michael's School ("the School"). Its status is advisory only. It is addressed to parents of pupils and of prospective pupils and to all members of the teaching and administration staff.
2. This policy contains an overview of the Bursary Scheme currently in operation at the School. The policy, together with all ancillary documentation including a financial means questionnaire, is made available to all parents and prospective parents on request.
3. The School was founded in the monastic tradition of the Church of England, for the educational support and care of local children and furtherance of the mission and pastoral care by the Church of England. Bursary funding is designed to support these fundamental aims and purposes of the school. Consideration of applications by the school is made in the light of these fundamental charitable aims.

### Aims

4. The aims of this policy are:
  - 4.1 to widen pupil access to the School and ensure that a St Michael's education is provided to children from a broad spectrum of society;
  - 4.2 to meet the Charity Commission's public benefit requirement;
  - 4.3 to ensure that children already at the school will not be forced to leave if the members of their family responsible for fees have come upon challenging financial circumstances.

### Information

5. We provide parents of prospective pupils with information about the School and the educational services we provide in good faith. This information may be contained in the School's prospectus, website, promotional literature and/or in statements made by staff or pupils during a visit or an open day. If the Parents wish to take account of any information provided to them when deciding whether to enter into an agreement they should seek specific confirmation from the School that the information is accurate before returning a completed acceptance form to the School.

### Introduction

4. The School is a registered charity that is committed to providing substantial public benefit. The School is aware of its obligations under the Charities Act 2006 and seeks to adhere to the public benefit principles identified by the Charity Commission. This policy is reviewed on an annual basis to take into consideration the latest guidance from the Charity Commission and any other factors relevant to this policy.

5. The School's Bursary Scheme covers bursaries for the parents of new pupils as well as for parents of existing pupils. The Scheme is designed to assist parents or prospective parents on low incomes.<sup>1</sup>
6. Bursaries are entirely means tested and are awarded on an annual basis to households which are financially eligible and who meet the application requirements set out below in full. Due to the limited financial resources of the School not every eligible application for a bursary will be successful.
7. All bursary applications are treated in the strictest confidence. Pupils will not be made aware that they benefit from a bursary unless informed by their parents.
8. It is intended to offer new bursaries for children entering the School between Reception and Form 5 inclusive.

## **Publicity**

9. We view a socially diverse pupil population as a key component of a full and balanced education. The availability of bursaries at the School is advertised locally.

## **Eligibility and Procedure**

10. All parents and prospective parents of pupils at the School are eligible to apply for a bursary and should contact the Head at the School for more information.

Financial assistance is available in the form of means-tested bursaries of up to 100% of tuition fees. The level of bursary will be determined by the post-tax household income which is assessed by taking into account the gross income, direct outgoings and the value of property and other assets of all responsible adults<sup>2</sup> living within the household. This information is collated by asking responsible adults to complete a confidential assessment form provided by Bursary Administration Limited (BAL), an independent advisory company appointed by the School. Applications for bursaries must be received by the Head in writing no later than 31st December each year. Each application for a bursary is considered on its own merits but by way of general guidance, a post-tax household income of more than £50,000 is unlikely to attract a bursary while a post-tax household income of less than £18,480 may be offered a 100% bursary. Similarly a post-tax household income of £30,000 may qualify for a 50% bursary. Please also note that responsible adults who may have low income but have substantial assets may not be eligible to receive a bursary.

11. It is critical that all responsible adults who contribute to the household income answer all the questions carefully and in full. All bursaries are subject to an annual means-test review conducted by Bursary Administration Ltd. Nevertheless, should any of the information disclosed in response to the questionnaire become inaccurate later, the School must be informed without delay. Failure to divulge requested information or a change in circumstances to the School could lead to a bursary being withdrawn or withheld.
12. Home visits to applicants by members of Bursary Administration Ltd to confirm personal circumstances will normally be undertaken. Failure to agree to a home visit will require that the application for a Bursary be withdrawn.

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<sup>1</sup> The definition of 'low income' is subject to further guidance from the Charity Commission. Until this is received, the working definition is 60% of average income (£30,800 [2020] – Office for National Statistics).

<sup>2</sup> Responsible adults in this respect refers to all adults within the household who contribute directly or indirectly to the upbringing of the child.

## **The Bursaries**

### **Bursaries:**

13. The deadline for Bursary applications is 31<sup>st</sup> December for admission to the School the following September.
14. Deposit Fees will be waived for the successful applicant.
15. Bursary Administration Limited (BAL) will send out confidential assessment forms to parents who have registered an interest by writing to the Head and which will be followed by a home visit from BAL.
16. Bursary reports from BAL are considered by the Bursary Committee during the Lent Term. The Head will notify applicants of whether they have been successful by letter before the end of the Lent Term. Successful applicants will be sent a letter of offer specifying the conditions of award and requiring them to complete and sign an acceptance form.
17. All bursaries are awarded for one academic year and remain subject throughout that period to the conditions of award provided with the letter of offer.
18. It should be noted that the provision of a Bursary for one child of the family will not necessarily lead to further offers for siblings.
19. Only one bursary per family can be awarded at any one time. Bursaries for siblings will only be considered once the original Bursary is no longer in operation.
20. The Governors will decline or withdraw a Bursary if it is discovered that they have been misled at any time either during the application process or whilst a Bursary has been held in previous academic years.
21. Governors reserve the right to seek redress for historical misinformation and may inform any appropriate authorities.
22. The Governors' decision is final, but the rejection of an application does not prevent a subsequent application.
23. It should be noted that no bursary will be offered for the whole of a pupil's time with the school, although bursaries are reviewed on a means-tested basis annually and will be renewed if the financial circumstances have not altered drastically (the amount of bursary may be lowered or increased as Governors deem fit) and the performance of a pupil is deemed to be acceptable.

### **Clergy Bursaries**

24. In accordance with the foundation of St. Michael's school for the benefit of local children and the furtherance of the mission and pastoral care of the Church, the school welcomes applications for places for the children of clergy. A discount of 50% fees for each child is given for the children of priests and ordained ministers in the Church of England. This offer is subject to the priest or minister being in full time employment as a priest or minister and where the total household income does not exceed two and a half times the standard stipend for full time ministers of incumbent status in the Diocese of Chelmsford\*. The discount is reviewed annually subject to change in relevant household

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circumstances. The same offer is available to other church ministers in communion with the Church of England. Priests and ministers of other denominations affiliated to Churches Together in England and Wales may also apply for this discount on the same terms though this will be considered on a discretionary basis.

\* Currently £26,800 p.a.

### **Emergency Bursaries:**

25. Exceptional emergency bursary support exists to help parents whose children have started at the School and who suffer unanticipated changes in circumstance and consequent financial hardship. Because funds are limited, and the likelihood that the level of support required will be high, these awards are offered judiciously and sparingly. The receipt of bursary support will depend upon the:

- o financial circumstances of the parent
- o stage at which a pupil has arrived at in their 'educational journey'
- o potential of a proposed award to help the pupil reach an appropriate 'break point' in their education
- o wider considerations of family circumstance and lifestyle.

It should also be noted that the pupil's attitude to learning will be taken in to account when an application is considered.

In practice this means the focus of bursary funding for current pupils should:

- o allow pupils to reach an appropriate 'break point' in their education
- o not be used to support those who have just arrived at the School
- o not be used to support those who would require several years of funding to reach a suitable 'break point'
- o be supportive of loyal families

Decisions on Emergency Bursary requests should be made after due consideration of the points listed above.

<b>Authorised by</b>	Mark Stennett, Chair of Governors, prior to full endorsement by the full Governing Body in June 2021.
<b>Date</b>	25 <sup>th</sup> March 2021
<b>Reviewed by the Bursary Committee</b>	26 <sup>th</sup> February 2021

<b>Effective date of the policy</b>	November 2015 [1 <sup>st</sup> Edition]
<b>Circulation</b>	Governors / teaching staff / all staff / parents of pupils and of prospective pupils [on request] / appropriate charities and authorities.
<b>Status</b>	Advisory. This policy will be reviewed periodically and at least annually and may be subject to change and alteration.

# St Michael's School

## Bursary Scheme

### Conditions of Award

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1. **Obligations of the pupil:** A pupil who is the subject of an Award is required to work hard, to contribute positively to the life of the School, to be a credit to the School and to set a good example to other pupils. These are the *Purposes of the Award*.
2. **Obligations of the Parent/s:** The parents are expected to support and encourage the pupil to achieve the Purposes of the Award and to uphold the aims and the good name of the School. The parents are also required where necessary to pay for any extra subjects and additions to the account by the first day of term.
3. **Withdrawal of the Award:** The Award may be withdrawn by written notice sent to a parent if, in the opinion of the Governors acting in good faith, the pupil or a parent has not complied with the obligations set out at paragraphs 1 and 2 above or otherwise the pupil has fallen below the required standards of conduct and progress and in the further opinion of the Governors there has been no significant improvement following consultation with a parent and/or the pupil and a written warning. Withdrawal of the Award shall take effect from the start of the following term.

Further, the Award may be withdrawn by written notice if:

- the balance of the account remains unpaid 28 days after a written reminder has been sent to the parents;
  - the parents fail to disclose accurate information about their financial position.
4. **Repayment events:** Parents shall be required forthwith upon written notice to repay all or part of the benefits they have received under the Award in any of the following circumstances:
    - a) up to three terms' benefits (if received) if the pupil has engaged in serious misconduct or has been expelled or removed for reasons of misconduct by the requirement of the Head acting in good faith;
    - b) up to three terms' benefits (if received) in a case of the pupil being withdrawn for any reason during a school term without a term's written notice having been given;
  5. **Fees in lieu of notice:** For the avoidance of doubt, the benefits receivable under an Award do not apply to any term for which the School has required payment of fees in lieu of notice.
  6. **Terms and Conditions:** These Conditions of Award take precedence over any of the School's terms and conditions which are inconsistent with them but in all other respects the terms and conditions as amended from time to time shall apply and these Conditions of Award shall be interpreted in accordance with them.