

# Bursary Policy

Recommended review period: Annual  
Reviewed by: Principal & Director of Finance  
Date reviewed: September 2019  
Next Review: September 2020



## MEANS -TESTED BURSARIES

### General

The Governors of St Joseph's College are committed to broadening access to the College by offering to eligible parents/guardians means-tested financial support with the payment of Colleges fees. Such support is known as a Bursary and may be awarded in the form of a discount of typically up to 50% on tuition fees payable, depending on the financial, compassionate or other pertinent circumstances of applicants. Such awards are subject to the availability of College funding and cannot be guaranteed.

Bursary awards are subject to repeat testing of parental/guardian means each year and may be varied upwards or downwards, depending on circumstances. Awards are made on the basis of the St Joseph's College Scale of Awards, which sets out award levels in relation to a family's financial circumstances. The Scale of Awards is reviewed and revised annually by the Principal to reflect any changes in fee costs, and is approved by the Governors. Though awards are generally tied to this scale, they may be varied upwards or downwards depending on individual parents/guardians' circumstances (e.g. their savings, investments, house equity and realisable assets, as well as their income, the size of their family, any other persons dependent upon them and like), compassionate or other pertinent considerations.

Requests for financial support usually fall into two categories:

- New applicants to the College, where a place has been offered but parents/guardians are unable to fund the tuition fees.
- 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parents/guardians' circumstances has resulted in difficulty in meeting tuition fees and may result in the child being withdrawn part way through a stage of education.

### New Applicants to the College

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

- The College prospectus.
- The College website.

### The Application Process.

Bursaries may be made available to parents/guardians of children entering St Joseph's College. (See the College's Admissions Policy). They are awarded at the discretion of the Governors; the Principal and Director of Finance are responsible for the management and coordination of the process.

- Step One. Parents/guardians seeking 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 Annex A and must be accompanied by full documentary evidence. The completed forms, together with the necessary documentary evidence, are to be submitted to the Director of Finance no later



than the **date of the Entrance Exam** in any year for bursaries to start the following September.

- Step Two. The Director of Finance 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 College. This may involve The Director of Finance, or a representative, visiting the parents/guardians' home to ensure the information has been correctly interpreted and the basis of the financial assessment has been fair.
- Step Three. The Director of Finance prepares a recommendation in accordance with St Joseph's College Scale of Awards which is considered with the Principal and a joint recommendation is then reached.
- Step Four. The joint recommendation is presented to the Scholarship and Bursary Committee for approval.
- Step Five. If the application is approved by the Scholarship and Bursary Committee, the parents/guardians will be offered a place at the College with a bursary.
- Step Six. Parents/guardians accept the offer of the place and the Bursary by returning a completed acceptance form agreeing to be bound by conditions of award relating to the bursary.

#### The Case for Assistance.

The Principal and Director of Finance 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 College 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. Bursary funds are limited and those judged most likely to gain most from the educational provision will be given priority. Each pupil to whom support is offered must, in the opinion of the Principal, be likely to make sound academic progress following admission and possess the potential to develop the quality of his or her work, and benefit from participation in the wider, extra-curricular activities on offer at the College. In normal circumstances, each applicant should meet the College's normal academic requirements. Previous College reports will be looked at for evidence of good behaviour.
- Financial Limitations. The amount of bursary award is not influenced by the level of the academic ability of the child but by the extent of need. Each case is assessed on its own merits and awards are made accordingly, subject to the College'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 College fees will be personal. However, the College has a duty to ensure that all bursary grants are well focussed 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 College 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 College 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 colleges (or universities) the College's grant will take into account all these outgoings.
- Acknowledging that others might have a different view; the College considers that the following would not be consistent with the receipt of a bursary:
  - Frequent or expensive holidays.
  - New or luxury cars.
  - Investment in significant home improvements.
  - A second property or 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 a child has siblings at the College.
  - Where the social needs of the child are relevant (e.g.: may be suffering from bullying at their present School/College).
  - 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 College adding to the stress of coping with the parents/guardians separating.

### **Existing Pupils - Change in Family Circumstances**

Within overall budget funding the College will, in normal circumstances, set aside each year a Hardship Fund, 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. This sum will be set within budgetary constraints. Parents/guardians with a child at the College whose financial circumstances suddenly change may apply for a bursary to the Director of Finance explaining their situation and using the forms at Annex A. Such awards are subject to the availability of funding and cannot be guaranteed.

### **Annual Review**

Bursary awards are subject to an annual review by the College and may be adjusted depending on parental circumstances. Annual review forms will be issued at the beginning of January each year for return by the end of the month. All bursary awards are subject to repeat testing of parental means each year and may be varied upwards or downwards depending on parental circumstances. For those previously in receipt of bursaries, the Principal and Director of Finance, in making their joint recommendation to the Scholarship and Bursary Committee, have the discretion to recommend to the Committee 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 College, for example by the late payment of any contribution they are making to the fees.

### **Confidentiality**

The College 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 College's Bursary Fund, there are a number of educational and charitable trusts that provide assistance with tuition fees. In the majority of cases, these are to assist children who are already attending a fee-paying School/College and due to a change of circumstances may be unable to remain. St Joseph's College 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 Director of Finance  
St Joseph's College  
Email: [finance@stjos.co.uk](mailto:finance@stjos.co.uk)

Annex:

- A. Bursary Application Form – *Please contact the Director of Finance for form.*
- B. Educational Trusts - please visit <http://educational-grants.org/> for more information

## Scholarship or Bursary: conditions of award

- 1 **Grant of the Award:** An Award is granted at the sole discretion of the College.
- 2 **Obligations of the pupil:** The pupil who is the subject of an Award is required to work hard, to contribute positively to the life of the College, to be a credit to the College and to set a good example to other pupils. The pupil must adhere to the College's required standards of conduct and progress. These are the **Purposes of the Award**.
- 3 **Obligations of the parent(s):** The parents are required to:
  - 3.1 support and encourage the pupil to achieve the Purposes of the Award; and
  - 3.2 support and uphold the aims, values, ethos and good name of the College; and
  - 3.3 comply with the College's *Terms and Conditions*.
- 4 **Means tested awards:** All means tested awards will be subject to annual review and the parents shall each year be required to complete a financial means questionnaire. After any annual review, the College reserves the right to vary the value of the award with immediate effect and will confirm the new value in writing to the parents.
- 5 **Continuation of the award:** Continuation of the award is dependent upon the following conditions being fulfilled:
  - 5.1 in the case of a means tested award, the parents satisfy the College's financial requirements each year; and / or
  - 5.2 in respect of all awards:
    - 5.2.1 the financial resources allocated by the College to support the award being sufficient to maintain the award; and
    - 5.2.2 it being in the financial interests of the College to maintain the award.
- 6 **Confidentiality:** The value and terms and conditions of the award shall remain confidential between the parents and the pupil and the College.
- 7 **Termination of the award:** The award may be terminated on the following grounds:
  - 7.1 **termination on financial grounds:** the College may terminate the award on one term's notice in writing if, in the opinion of the College's Governors acting in good faith:
    - 7.1.1 the parents have not satisfied the College's financial requirements under clause 4 and clause 5.1; or
    - 7.1.2 the College is no longer able to continue the award under clause 5.2.The termination shall take effect from the date set out in the written notice;
  - 7.2 **termination on the grounds of conduct:** the College may terminate the award by written notice sent to the parents with immediate effect if, in the opinion of the

College's Governors acting in good faith, one or more of the following conditions has been fulfilled:

7.2.1 the pupil has not complied with the obligations set out in clause 2 and in the further opinion of the Governors there has been no significant improvement following consultation with the parents and / or the pupil and the issue of a written warning; or

7.2.2 the parents have not complied with the obligations set out in clause 3; or

7.2.3 the parents of the pupil do not keep the value and terms and conditions of the award confidential in accordance with clause 6; or

7.2.4 the parents withdraw the pupil from the College without providing a full term's written notice.

7.3 **Repayment of the award:** The parents will be required to repay all or part of the benefits received under the award, if it is terminated in any of the following circumstances:

7.3.1 under clause 7.1.1 if the parents have knowingly or recklessly provided false or inaccurate information about their financial position, all benefits received from the date on which the false or inaccurate information was supplied may be repayable; or

7.3.2 under clause 7.1.2 if the pupil has been found to have committed a serious breach or series of persistent minor breaches of discipline for which the sanction would normally be expulsion or required removal, up to three terms' benefits (if received) may be repayable.

8 **Fees in lieu of notice:** For the avoidance of doubt, the benefit receivable under an award will not apply to any term for which the College requires payment of fees in lieu of notice.

9 **Conditions of award:** These conditions of award take precedence over any of the College's *Terms and Conditions* which are inconsistent with them but in all other respects the College's *Terms and Conditions* as amended from time to time shall apply and these conditions of award shall be interpreted in accordance with them.