
SAINT NICHOLAS SCHOOL

MEANS-TESTED COMMUNITY AWARD POLICY

Note: This policy applies to all sections of the school including EYFS

Reviewed April 2016

Review Date April 2017

1. GENERAL

The Governors of Saint Nicholas School are committed to broadening access to the Senior School by offering to eligible parents/guardians means-tested financial support towards the payment of school fees.

The Community Award, worth up to 100% of the fees following means testing, academic assessment, reference from the current school and an interview with the Head, is available to pupils with outstanding overall academic ability and is normally tenable for the whole of the pupil's time at Saint Nicholas subject to satisfactory progress and continued excellent effort and excellent behaviour. Priority is given to local applicants who require either full or substantial funding in order to take up the offer of a place.

Offers are subject to the School's academic assessments, a reference from the pupil's current school and an interview. In assessing a pupil's suitability, potential will also be considered as well as actual achievement. Children 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 Head, be likely to make excellent academic progress following admission. Previous school reports will be consulted for evidence of good behaviour.

2. THE APPLICATION PROCESS

Awareness Information provided by the School alerting the parents/guardians of potential pupils to the possibility of gaining means-tested financial support towards the payment of school fees is included in: the School prospectus, the School website, local press.

Key dates

The exact schedule for the application process varies each year and exact dates are published annually. The chart gives an indication of the schedule.

2.1 Step One

Parents/guardians seeking a Community Award 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, is Annex A; when submitted, it must be accompanied by full documentary evidence. The completed forms, together with the necessary documentary evidence, are to be submitted to the Bursar at the time of application for the award.

2.2 Step Two

All applications are assessed in order to establish the likely level of support which will be required in order to allow the child to attend the School. This may involve the Bursar, or his representative, visiting the parents'/ guardians' home to ensure that the information has been correctly interpreted and that the basis of the financial assessment has been fair.

2.3 Step Three

Applicants are formally assessed and portfolios of work are viewed by relevant teachers.

Step 1 – Application - November

Submit application form and completed financial form.

Step 2 – Applications assessed - January

Applications are assessed to establish the likely level of support which will be required.

Step 3 – Academic assessment - January

Formal assessment of candidate.

Step 4 – Award recommendations - January

Recommendations for awards are presented to the Governors.

Step 5 – Advice of awards - February

Applicants are advised whether a place is to be offered and the level of award.

Step 6 – Acceptance - March

Parents/guardians sign acceptance of offer.

2.4 Step Four

A recommendation is prepared and is presented to the Governors, Head and the Bursar for approval.

2.5 Step Five

The parents/guardians are advised whether their child is to be offered a place at the School and of the Community Award

2.6 Step Six

Parents/guardians are then required to sign a letter and admission form accepting the place, pay the admission fee, and sign an acknowledgement agreeing to any conditions relating to the Community Award.

3. FINANCIAL LIMITATIONS.

The amount of the Community 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 School's ability to fund these within the context of 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 awards are well focused and so, as well as current earnings, other factors which will be considered in determining the necessary level of award 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 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 schools (or universities) the School will take into account all these outgoings.
- Acknowledging that others might have a different view, the School considers that the following would not be consistent with the receipt of a Community Award:
 - Frequent or expensive holidays.
 - New or luxury cars.
 - Investment in significant home improvements.
 - Second property/land holdings.

4. CONFIDENTIALITY

The School respects the confidentiality of Community Awards, and of all related information, and recipients are expected to do likewise.

Annex A – COMMUNITY AWARD Application Form

SAINT NICHOLAS SCHOOL – CONFIDENTIAL - Please return to the Bursar

Confidential Statement of Financial Circumstances in support of an application for a Community Award

Please read the Notes for Guidance on pages 6 and 7 before completing this Questionnaire

1. CHILD

(a) Full Names

(b) Date of Birth

(c) Term/Year of Entry (if not yet enrolled)

2. PARENTS (See Note 2)

	Father / Step-father	Mother / Step-mother
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(a) Names
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(b) Style or Title
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(c) Address(es)
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(d) Occupation
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(e) Retired – Employed – Self Employed – Unemployed (*circle which applies*)

(f) Name & address of	Father / Step-father	Mother / Step-mother
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Employer or		
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Business
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(g) Are you a Director or Proprietor of this Business?	YES / NO	YES / NO
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If "YES" state proportion of Company or Business you and/or your spouse/partner own
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(h) Daytime Tel No
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Evening Tel No
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Mobile Tel No
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Fax No
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E-mail address (father)	(mother)
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(i) For how long you anticipate the bursary be required

(j) If changes to family circumstances have prompted this application please provide details of the changes.

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3. INCOME (See Note 3)

(Please enter below your current earnings and expected income from all sources for this tax year)

	Father £ p a	Mother £ p a
(a) Gross Salary and other similar earnings (including all taxable benefits & emoluments)
Value of benefits in Kind
(b) Profits of business, farm, estate or Profession
(c) Gross pension, widow's pension, etc
(d) Gross investment income from:
i) Building Societies/Banks
ii) Dividends
(e) Income from Trust funds
(f) Gross income from property
(g) Social Security benefits (including Child Allowance)
(h) Separation or Maintenance Allowance
(i) Is there a Court Order/Separation Agreement? If yes, please state annual amount payable for school fees.	YES / NO	YES / NO
(j) Benefits in Kind provided free by reason of employment
(k) Support from other family members such as grandparents
(l) Any other income not included in (a) to (i) above

4. OUTGOINGS (See Note 4)

(a) Tax payable on Incomes declared above (including tax deducted at source)	.....	.....
(b) National Insurance Contributions	.....	.....
(c) Superannuation contributions	.....	.....
(d) Mortgage interest at current rate (include capital repayment as well as interest)	.....	.....
(e) Endowment mortgage insurance	.....	.....
(f) Any other interest payable (please specify)	.....	.....
(g) Annual landlord rent payable on principal Residence	.....	.....

5. CAPITAL ASSETS (See Note 5)

Father £ p a

Mother £ p a

(a) Approximate market value of all investments

i) Building Society/Bank deposits

ii) Equity investments, Government stocks

iii) PEPs, ISAs, TESSAs

(b) Approximate market value of principal residence (*freehold or leasehold*)

(c) Approximate market value of other possessions including house contents car, etc,

(d) Cash at banks or elsewhere

(e) Approximate market value of any other assets (please specify and include the market value of any Insurance Policies maturing in this tax year or the last five years)

(f) Net worth/value of any businesses which you own or share

(g) Approximate market value of any other properties owned either at home or abroad

(h) Redundancy, employment, separation or lump sum payments receivable

6. CAPITAL LIABILITIES (See Note 6)

(Please give details of any capital charges against the assets declared in Section 5)

(a) Mortgage - amount outstanding on house and repayment date

Interest rate - % and Type

(Variable / Tracker / Fix)

End Date for Tracker / Fixed deal

(b) Other liabilities (*please specify*)

SUB-TOTAL ASSETS (5)

LIABILITIES (6)

NET ASSETS (5-6)

You should indicate if there are any reasons why net assets cannot be converted or utilised to pay school fees or to fund fees.

7. DEPENDENT CHILDREN (See Note 7)

(Include the child to whom this application refers: if more than 4 children, give details on a separate sheet)

	1	2	3	4
(a) Forename
(b) Date of Birth
(c) School or College

	£	£	£	£
(e) Annual school or other educational fees (excluding extras and <i>sundry disbursements</i>)
(f) Compulsory additional school charges
(g) Amount of fees shown in (e) covered by:				
i) Scholarships, Bursaries or allowances given by school
ii) Annual sum arising from capital repayment scheme
iii) Services/Diplomatic/ Company Education Allowances (gross)
(state whether sum has been included in gross salary at 3 (a))				
iv) Annual sum arising from Educational Insurance Policies
v) Assistance from any other sources eg Grandparents, trusts, settlements, etc (<i>please specify</i>)
(h) i) Annual income of child (<i>if any</i>)
ii) Capital value of Child's Trust fund

The details requested with regard to the fees payable and grants received on behalf of your other children are for information only and will not normally be taken into account in the assessment of the level of grant awarded.

8. OTHER DEPENDENTS (See Note 8) (*Please give details*)

9. ANY OTHER RELEVANT INFORMATION (See Note 9) (*Continue on final page if necessary*)

10. VERIFICATION OF INCOME

Please enclose documentary evidence in support of the income figures in Section 3.

Please tick those you are enclosing:

- P60 Copy of Inland Revenue tax calculation
issued under Self Assessment
- March (EOY) Pay Statement Confirmation of Schedule D self employment
income from an independent accountant

Report, Accounts & Balance Sheet for the period

Others (please specify).....

11. VERIFICATION OF ASSETS

Please enclose documentary evidence of capital assets and tick those you are enclosing:

- Property Valuation Investment Portfolio Valuation
- Mortgage Statement Contents Insurance

12. ASSISTANCE FROM OTHER SOURCES

In order to help the greatest number of parents who need financial assistance, all those who apply for a grant from the school are asked first to enquire if they are eligible for assistance from any other source.

Please state whether you have applied to trusts or foundations for a grant, and if so to which and with what result.

13. DECLARATION

After having read the attached notes, the following declaration should be signed by both parents/applicants (or see below):

We/I have read the notes and have made a complete declaration of our/my income and assets.

We/I understand that if we/I are/am offered a Grant for our/my child and accept a place for him/her at the school:-

- a) our/my child's fees account with the School will be credited each term with the amount of the Grant;
- b) we/I understand that any award or grant is subject to annual review and that we/I must complete an annual declaration of our/my financial circumstances on the form sent to us/me by the School and supply all relevant supporting evidence by the return date indicated;
- c) undertake to report immediately any material change in the financial position declared;
- d) the Grant may be withdrawn or reduced, and in certain circumstances, past payment reclaimed if:
 - i) there is a breach of the School's Terms and Conditions attached to the acceptance of a place for our/my child at the school;
 - ii) we/I have knowingly and/or recklessly provided false information;
 - iii) we/I have failed to return the annual declaration of our/my financial circumstances by the return date indicated;
 - iv) we/I have failed to produce any additional information required by the School to evidence our/my financial circumstances;
 - v) there is in the view of the Head either unsatisfactory work or conduct;
 - vi) the School's resources are insufficient to maintain the level of award.

Signatures:

Father Date

Mother Date

If the above declaration is signed by only one parent, please delete as necessary below.
Divorced/separated/widowed/other (state reason)

NOTES FOR GUIDANCE FOR COMPLETION OF COMMUNITY AWARD APPLICATION FORM

1 GENERAL

Before completing the form, please read these notes carefully, and contact the Bursar if further information or advice is required. These notes refer to the corresponding paragraph on the Form.

The School reserves the right to seek any other documentary evidence in support of the income and asset figures submitted, and to make enquiries which it deems necessary.

All financial values should be shown in Sterling. References to Inland Revenue should include the relevant national Taxation Authority.

2 PARENTS/APPLICANTS

These are defined as:

- the natural father and mother of the child where they live together (whether or not they are married to each other) and the child normally resides with them both in the same household; or
- the parent of the child with whom the child normally resides and the partner (if any) of that parent where the partner normally resides with that parent and the child in the same household; or
- the child's guardian appointed in accordance with section 5 of the Children Act 1989 (or any earlier enactment) and the partner (if any) of that guardian where the partner normally resides with that guardian and the child in the same household; or
- the person with whom the child resides in accordance with either:
 - i. a subsisting residence order made under section 8 of the Children Act 1989; or
 - ii. any subsisting court order (other than a residence order) which specifies who is to have actual custody or care and control of the child; or
- where a pupil either has no parents as defined above or the school is satisfied that no such parents can be found, and he is either looked after by a local authority or provided with accommodation within the meaning of section 105(1) of
- the Children Act 1989, the pupil shall be treated as one whose parents have no income for the purposes of the scheme; or
- where none of the above applies, the parent is the person with whom the pupil normally resides in accordance with any informal care or fostering arrangement and that person's partner (if any) where the partner normally resides with that person and the pupil in the same household.
- If parents are separated or divorced before or while their child attends the School, both mother and father are required to complete and sign the Application Form.

3 INCOME

Re (a) The gross annual amount of salaries and wages, including any earnings from profit related pay, part-time employment and any sum received as bonus, commission etc, statutory sick pay, statutory maternity pay giving GROSS amounts (before deduction of tax, NI, superannuation, etc) for the current or latest financial year. Taxable benefits in kind agreed with the Inland Revenue should also be shown (free or subsidised housing, meals, petrol, cars, etc) – at the amount agreed for taxable purposes.

Re (b) Profits from a business or profession – at the amount of GROSS income agreed by HMIT or relevant tax authority for the year in question (deductions should be made only in respect of capital allowances, losses and stock relief). Copies of the latest set of accounts should be included.

Re (d) All other Investment income (eg interest or National Savings Bank deposits; dividends, annuities etc) should be entered GROSS of tax. If tax was deducted at source, parents should add in the amount of tax paid or tax credit notified. Building Society interest must be disclosed GROSS.

Re (f) All social security benefits received should be declared and type of benefit specified.

Re (g) Court Orders, Legal Separation Agreements and Voluntary Arrangements for School Fees – Where a parent is required by a Court Order, or a legal binding separation agreement (eg Deed of Separation) to

pay part of the School fees, then only that part of the fee which is not covered by the Court Order/agreement will be used to calculate any grant to be awarded. This is irrespective of whether or not the order or agreement is being complied with. Where the whole amount of the fees are required to be paid by virtue of a Court Order or separation agreement, applicants are not eligible for a grant. You should indicate how many years are payable and any annual variations. All receipts relating to maintenance payments, separation allowances and sums in respect of Child Support maintenance must be declared.

Re (i) Include free benefits in kind agreed by Inland Revenue as not subject to tax, eg representative occupation of house, free meals.

Re (j) Enter income from letting or subletting of property at the amount of the NET profit agreed with the Inland Revenue; and royalties and all other sources including entertainment and travel allowances etc.

4 OUTGOINGS

a) Enter Income Tax and tax on unearned income SEPARATELY.

b) Enter annual superannuation contribution or (if applicable) payments to other Pension Schemes.

c) Enter capital as well as interest payment on a mortgage for the principal residence.

d) Only complete this if repayment is effected by means of a full Endowment Policy.

e) Include bank overdraft and other loan charges incurred during the year (specifying the purpose of the loan).

5 PARENTS'/APPLICANTS' CAPITAL ASSETS

In addition to taking account of all relevant sources of income, the School takes account of the following assets:

Re (a) The capital sum of any monies on deposit with any bank, deposit taker or building society. Investments in stocks and shares valued as near as possible to the date of submitting the application form.

Re (b) The current market value of your principal residence. The current market value should be estimated by parents.

Re (f) If you run your own business or are partners in a business, then you should show the net worth of the business. Shares in a company not listed on a stock exchange should be valued at the relevant proportion of the net value of the company.

Re (g) In the case of second homes and/or other properties, these should also be included at their estimated current market value; no allowance will be made for any outstanding mortgage.

6 PARENTS'/APPLICANTS' CAPITAL LIABILITIES

Details of other liabilities should be provided along with the lender. Mortgage documentation must include information relating to interest rates, i.e. whether a tracker / fixed rate / lender's standard rate, clearly identifying the expiry date applying to any special terms – this information is usually shown on the original mortgage offer. This must be provided along with your latest mortgage statement.

7 DEPENDENT CHILDREN

Use column number 1 for the child for whom you are now applying at his/her current school rate. Enter in other columns any other of your children who are unmarried and at a school, university or other educational institution which attracts a county grant.

Re (e) The figures to be inserted here refer to the current academic year.

Re (g)(iii) Members of HM Forces and Diplomatic Service should include the amount of any Education Allowances which they receive. Parents in other occupations should include any similar sum

Re (g)(iv) Insurance Policies for School Fees – If any insurance policy for the payment of School fees exists, then the amount declared is the amount receivable under the policy for the academic year for which the application is

being made. If the insurance policy covers the full cost of the tuition fees, then the pupil is not eligible for a grant. The types of policy concerned are those which stipulate that the company shall pay the school fees, in whole or in part, to the school in respect of the pupil.

Re (g)(v) Where a Trust Deed has been drawn in favour of the child for whom you are applying, details of the annual amount available and the date of commencement of payment under the Deed should be given.

Re (h) Where the child has any unearned income, eg interest from National Savings, bank or building society deposits, or receives share dividends, you should enter the source of income and the gross amount received before deduction of any tax. Do not include any income from part time employment or student grants. You should enter the capital value of any beneficiary or other trust set up for each child.

8 OTHER DEPENDENTS

If you qualify for a Carer's Allowance, or have an aged grandparent or relative living with you or dependent upon you, please provide details including age, address, condition, etc.

9 ANY OTHER RELEVANT INFORMATION

Please enter, on a separate sheet if necessary, any details which may affect the assessment of a grant, e.g. a significant change in income or outgoings for the coming year.