



# CHARLTON HOUSE — Catholic Prep —

Nurturing excellence, embracing  
communities and inspiring futures

## Bursary Policy and Application

Reviewed and approved by the Finance Committee November 2025

To be reviewed November 2026

<b>Date</b>	Sept 2025	Sept 2026		
<b>Reviewed by</b>	Finance Committee			

## MEANS-TESTED BURSARIES

### 1. Aims and Purpose of Bursaries

Charlton House School Limited (“Charlton”) is committed to providing significant public benefit. It is intended that Charlton is run as a registered charity and it is therefore aware of its obligations under the Charities Act 2011 and the Charity Commission's guidance 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.

Charlton's predecessor schools have a long history of providing financial assistance to pupils and their families. While the costs of running the School require that those who can pay full fees must do so, every year Charlton will forego a percentage of total fee revenue through bursaries and scholarships. It does so with the aim of offering, to eligible parents/guardians, means-tested financial support for the payment of school fees. Such support is known as a Bursary and these may be awarded in the form of a discount of up to 50% on tuition fees payable.

Eligibility for bursary assistance will depend on the financial, compassionate or other pertinent circumstances of applicants and is only available to permanent residents of the UK.

Charlton's Bursary Scheme is for the parents of pupils with the purpose of providing on-going support during the time that their child is a pupil of the school up to the level of support required on entry into the School subject to the parents' continuing compliance with the terms and conditions of the bursary award and the level of bursary funds available. The Scheme is designed to assist parents or prospective parents on low incomes who for financial reasons might otherwise be unable to send or continue to send their child to the School.

Bursaries are discretionary, entirely means tested, awarded (and reviewed) on an annual basis only to parents who are financially eligible and who meet the application requirements. Due to the limited financial resources of the school, not every eligible application for a bursary will be successful.

Awards are made at the discretion of the Bursary Committee following a full review of individual parents/guardians' 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), compassionate or other pertinent considerations.

Requests for financial support usually fall into two categories:

New applicants to the school, where a place has been offered but parents/guardians are unable to fully 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.

### 2. The Application Process

Subject to available funds Bursaries may be made available to parents/guardians of children entering the school in all year-groups. They are awarded at the discretion of the Bursary Committee and the School Business Manager/Administrative Officer is responsible for the management and coordination of the process.

2.1 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 obtained from the School Business Manager/Administrative Officer and must be accompanied by full documentary evidence. The completed forms, together with the necessary documentary evidence, must be submitted to the School Business Manager/Administrative Officer by the 30<sup>th</sup> day of January in academic year prior to any bursary taking effect the following September (at the commencement of the following academic year). Applications submitted after this date will only be considered if bursary funds are still available for distribution and at the discretion of the Governing Board;

2.2 The School Business Manager/Administrative Officer will assess all applications in order to establish the likely level of support which will be required in order to allow the child to attend Charlton. This may potentially involve the School Business Manager/Administrative Officer, or their representative, visiting the parents/guardians' home to ensure the information has been correctly interpreted and the basis of the financial assessment has been fair and appropriate;

- 2.3 The School Business Manager/Administrative Officer will prepare a recommendation which is considered by the Bursary Committee and a joint decision is then made;
- 2.4 Prior to the 28<sup>th</sup> day of February in the preceding academic year to the bursary award taking effect, parents/guardians are advised whether their child is to be offered a place at the school and of the Bursary offer.
- 2.5 Parents/guardians are then required to sign a letter accepting the place at the school and an acknowledgement agreeing to any conditions relating to the bursary.

### 3. Criteria for Bursary Assistance

The School Business Manager/Administrative Officer and the Bursary Committee will consider a number of factors when deciding upon the justification for support and the extent of such support. First and foremost, the child's suitability for the school is the first consideration in granting bursary support.

- 3.1 Suitability: When assessing a child's suitability, the child's potential will be considered. Bursary funds are limited and those decided to be 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 Teacher, be likely to make sound progress following admission and benefit from participation in the wider, extra-curricular activities on offer at the school. Applicants for entry to Charlton are expected to meet the school's normal academic requirements by reference to various potential assessments, including a review of the child's performance at any previous schools. This does not necessarily preclude self-funded entry to the school. Previous school reports will be consulted for evidence of good behaviour.
- 3.2 Financial Limitations: The amount of the 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 school's ability to fund these within the context of what is viable within its overall budget.

It is recognised that views about what sacrifices a family should make to pay school fees will be subjective. However, the school has a duty to ensure that all bursary grants are fair 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 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 significant equity values in houses. Contribution to household costs by other, wider, family members, any adults unrelated to the child or by outside sources.

Acknowledging that others might have a different opinion; the School 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/land holdings.

- 3.3 Other Factors: It is recognised that, in addition to academic ability, behaviour and financial constraints, there may be other circumstances which should be considered. These include:
  - Whether a child has siblings at the school;
  - Where the social needs of the child are relevant;
  - Where a parent/guardian is terminally ill or is unable to secure permanent employment due to poor health.

### 4. Existing Pupils - Change in Family Circumstances

Within overall budget funding, the school will in normal circumstances consider 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 Charlton whose financial circumstances suddenly change may apply for a bursary to the School Business Manager/Administrative Officer explaining their situation and using the school's bursary application form. Such awards are subject to the availability of funding and cannot be guaranteed.

## 5. Annual Review

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 required to request and complete a new means-testing form in January each year which are to be returned by the 28<sup>th</sup> of February. For those previously in receipt of bursaries, the School Manager and the Bursary Committee in making their decision, have the discretion to reduce or withdraw 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 and/or any have not acted in a way that supports the ethos of the school.

## 6. Assessment Process

The bursary assessment considers the following factors:

- Gross household income
- Number of dependent children
- Single-parent household status
- Essential living and housing costs
- Exceptional circumstances (e.g., illness, redundancy, caring responsibilities)
- Savings, investments, and property assets

All information is treated confidentially and assessed consistently.

### 6.1 The school uses income bands to determine a starting bursary percentage:

Gross Household Income	Base Bursary %
Under £30,000	40-50%
£30,000-£40,000	30-40%
£40,000-£50,000	20-30%
£50,000-£60,000	10-20%
£60,000-£70,000	0-10%
Over £70,000	0%

These bands provide a consistent starting point before adjustments.

### 6.2 To ensure fairness, the school applies a contextual scoring system to adjust the base bursary percentage.

Points awarded:

- Single parent household +2 points
- Each additional dependent child +1 point
- Exceptional circumstances (with evidence) +2 points
- High unavoidable housing costs +1 point

Adjustment applied:

- 0-1 points → No change
- 2-3 points → +5%

- 4+ points → +10%

The final bursary award cannot exceed 50%.

### 6.3 Treatment of Assets

To ensure responsible allocation of bursary funds:

- Families with over £50,000 in liquid savings may not qualify for the highest bursary band.
- Families owning multiple properties may be deemed ineligible.
- Business assets may be considered depending on accessibility and liquidity.

## 7. Required Documentation

Applicants must provide:

- Last 3 months' payslips
- Last year's P60 or tax return
- Three months of bank statements (from all bank and savings accounts)
- Evidence of benefits, maintenance, or other income
- Evidence of rent or mortgage payments
- Evidence of exceptional circumstances (if applicable)

Incomplete applications may be declined.

## 8. Annual Review

Bursaries are awarded for one academic year. Families must:

- Reapply annually
- Report any significant change in financial circumstances
- Understand that bursaries may increase, decrease, or be withdrawn depending on updated information

## 9. Appeals

Families may appeal a bursary decision by writing to the Head Teacher within 14 days. Appeals are reviewed by the Bursary Committee, whose decision is final.

## 10. Confidentiality

The school respects the confidentiality of bursary awards made to families and recipients are expected to do likewise. In fact, it is a mandatory requirement for the recipient of a bursary to keep the nature and amount thereof confidential at all times. In the event it is discovered that a recipient has breached their duty of confidentiality, the Governing Board have the discretion to remove any bursary assistance.