



# Assisted Places Policy

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## Introduction:

1. Bancroft's has a long tradition of taking pupils from a variety of backgrounds, and participated in the Direct Grant and the Assisted Places Schemes. The School now continues that tradition each year, by offering up to two Assisted Places to applicants for entry into the Prep School (at age 7+) and up to a maximum of ten Assisted Places for entry into the Senior School (at ages 11+ or 16+).
2. This policy has been authorised by the Governors of Bancroft's School in furtherance of the Charity's public benefit policy.
3. This policy contains an overview of the Assisted Places Scheme in operation at Bancroft's School and, provides details of the procedure for applications to and awards made under the Scheme.
4. Bancroft's is committed to broadening access to the School by offering whenever possible to eligible parents/guardians financial support with the payment of school fees through the provision of Assisted Places. These Assisted Places are designed to enable children of high ability from all backgrounds to enjoy a Bancroft's education, where their parents/guardians might not otherwise be able to afford the full school fee.
5. An Assisted Place is a means-tested award and candidates are required to pass the entrance exam to be eligible.
6. Due to the limited financial resources of Bancroft's School, not every eligible application for an Assisted Place will be successful. *Assisted Places will be awarded once the School's financial assessment criteria has been met. Assisted Places are awarded based on performance in the entrance exam, school reports and an interview. The School's decision is final and there is no right to appeal.*

This policy should be read in conjunction with: **The School's Admissions Policy**  
**The School's SEND Policy**  
**The School's Equal Opportunities Policy**

## Eligibility:

1. Assisted Places are awarded following a \*means-tested assessment of the applicant's circumstances. (\*An examination of the applicant's income, savings and other investments, carried out in order to determine whether the criteria for a benefit or financial aid has been met).
2. The assessment of the level of Financial Assistance is calculated on a graduated scale after parents/guardians have submitted a comprehensive confidential statement of their income and assets, on a duly completed **Financial Disclosure Form (FDF)**, together with **copies** of any additional information, confirmations, and supporting documentation, which may be required. The School will also take into account compassionate and other relevant circumstances in deciding the level of support.
3. The value of an award depends on a number of factors, including total income, capital assets and the number of dependent children. For parents on low incomes, this may be a discount of up to 100% of tuition fees. The Bursar will be happy to discuss potential eligibility and may be contacted on:  
  
020 8505 4826.
4. Assisted Places are subject to annual review and parents will be asked to provide an updated Financial Disclosure Form (FDF). The annual review may result in the amount of an award being withdrawn, reduced or increased.
5. Once the School's financial assessment criteria has been met, Assisted Places are awarded based on performance in the entrance exam, school reports and an interview.
6. Relevant income is based on parents'/guardians' gross income, benefits, allowances and any other form of income, from all sources and is calculated from the information provided on the Financial Disclosure Form (FDF) and from information obtained by the School during the review of the application. In addition to relevant income, the School will also take into consideration savings, financial and property investments and assets when determining eligibility for the Award.

7. 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 its limited charitable resources are directed towards the most deserving cases and for this reason an Assisted Place is not intended to support families that, with reasonable financial and personal sacrifices, could have otherwise afforded paying the full fee. Family finances with the following characteristics would not normally be considered eligible for an Assisted Place:
- Opportunities to release capital. For example, significant capital savings, retained profits in a business and investments would be expected to be used for the payment of school fees, as would significant equity value in houses;
  - Proven ability to borrow, where families have been able to secure additional mortgages on buy-to-let properties;
  - The potential to improve the financial position or earning power of the family - 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;
  - In cases of separation, any significant contributions made by the absent parent;
  - Contributions to income costs and school fees 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;
  - Other indicators of wealth, for example:
    - o Frequent or expensive holidays;
    - o New or luxury cars;
    - o Investment in significant home improvements;
    - o A second property/land holdings;
    - o Other luxury items.

### **Terms of Assisted Place Provision:**

1. The School reserves the right to make or alter its overall Assisted Place scheme from time to time in the light of its changing financial or other circumstances.
2. Any terms on which an Assisted Place is made to an individual will be set out as part of the offer of a place and will generally continue for the child's duration at the School subject to annual review (see below). In the case of children who are awarded an Assisted Place at 7+ support from an Assisted Place will only cover the time during which the child attends Bancroft's Preparatory School.
3. Assisted Place awards are reviewed annually (see below) to take account of changes in parental circumstances.
4. The Head's decision is final in awarding an Assisted Place. The Bursar's decision is final in determining eligibility for the scheme and in assessing fees payable.
5. Free school lunches are provided to all pupils at Bancroft's School.
6. Assisted Place candidates will also receive financial assistance with additional expenses such as uniform and public exam fees. This will consist of the following:
  - A £300 annual uniform grant is provided.
  - A £200 one-off grant for a suitable laptop/device is provided.
  - All public exam fees are paid for by the School.

## **Confidentiality:**

The School respects the confidentiality of Assisted Place awards to families and recipients are expected to do likewise.

## **Applications:**

Applications for financial support fall into two categories: new applicants and existing awards which are reassessed on an annual basis.

### **New applicants:**

Means-tested Assisted Places are only available for new applicants at 7+, 11+ and 16+ at the School, all awards are conditional on:

- Full disclosure of information requested within the timescales given. A considerable amount of personal information will be required as well as documentary evidence (this may include pay slips, P60, HMRC self-assessment documents, pension income proof, share dividend vouchers and bank interest, bank statements, proof of residence including council tax bills etc.);
- The School satisfying itself that the information given is accurate. The School may seek objective third-party confirmation of a family's financial circumstances (including from a credit reference agency);
- A home visit from the School or its agents if the School deems this appropriate.

The School will not proceed with an application from anyone giving misleading, inaccurate or incomplete information.

### **Existing Awards - Annual reassessment:**

1. Once awarded, the Assisted Place normally applies for the duration of a pupil's school career. However, as a condition of the Award, parents/guardians of Assisted Place award holders will be required each year to complete a Financial Disclosure Form (FDF) for return by the date indicated together with all supporting documents, as requested. The same conditions apply as above. Continuation of the Assisted Place is conditional upon:
  - Full disclosure of information requested within the timescales given;
  - The School satisfying itself that the information given is accurate. The School may seek objective third-party confirmation of a family's financial circumstances (including from a credit reference agency);
  - A home visit from the School or its agents if the School deems this appropriate.
2. The School reserves the right to withdraw an Assisted Place from anyone giving misleading, inaccurate or incomplete information and in such instances the School may require parents/guardians to pay the School the value of all fee remissions and financial assistance previously provided under the scheme.
3. In addition, the Head also has the discretion to recommend the withdrawal of an award where a pupil's academic progress, attitude or behaviour has been unsatisfactory.

## **The Application Process:**

If an applicant wishes to apply for an Assisted Place the following steps need to be followed:

Step 1:

Applicants will be required to complete an Initial Assessment of Income Form (IAIF) via our School website. This seeks outline financial information and no supporting financial documentation is required at this stage. The deadline for the completion of this form is 2 weeks prior to the registration deadline and must be adhered to.

Step 2:

Applicants who have met the financial criteria will be asked to register via our website and the registration fee will be reduced for these applicants. Applicants who have not met the financial criteria at this stage will have the opportunity to apply for a full fee-paying place and will be required to register and pay the full registration fee for their child's application to proceed.

Step 3:

After registration, which must be completed by the publicised deadline, parents/guardians will be asked to complete a more detailed Statement of Financial Circumstances on a Financial Disclosure Form (FDF) for the tax year then current. At this stage copies of documents are required to support the application.

Step 4:

If the applicant is successful in their financial application, entrance exam and are offered an Assisted Place at the School, the Award will be subject to an annual means-test review. Parents of Assisted Place award holders will not be required to pay the £1000 deposit when submitting the Acceptance Form but a reduced deposit of £100.

Forms and copies of supporting documents should always be returned by the due dates given as delayed Assisted Place applications cannot be processed, and applicants may then potentially forfeit an Assisted Place. Applications for Assisted Places at the School are highly competitive.

In line with GDP regulations, copies of supporting documents for candidates not considered and candidates that have not accepted their offer are destroyed as confidential waste, once the admissions process has concluded.

This policy will be held on the School's website.

## **Assisted place: Conditions of Award:**

1. **Grant of the Award:** An award is granted at the sole discretion of Bancroft's School (the **School**). The School's decision is final and there is no right to appeal.
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 School, to be a credit to the School and to set a good example to other pupils. The Pupil must adhere to the School's required standards of conduct and progress. These are the **Purposes of the Award**.
3. **Obligations of the Parents/guardians:** The Parents/guardians are required to:
  - 3.1 support and encourage the Pupil to achieve the Purposes of the Award; and
  - 3.2 treat members of the School community reasonably and to uphold the aims and the good name of the School; and
  - 3.3 comply with the School's *Terms and Conditions*.
4. **Assisted Places:** All Assisted Places are means tested awards and will be subject to annual review and the parents/guardians shall each year be required to complete a Financial Disclosure Form (FDF). After any annual review, the School reserves the right to vary the value of the Award or withdraw it with immediate effect and will confirm the new value of the Award 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/guardians satisfying the School's financial requirements each year;
  - 5.2 in respect of all awards:
    - 5.2.1 the financial resources allocated by the School to support the Award being sufficient to

maintain the Award; and

- 5.2.2 it being in the financial interests of the School to maintain the Award; and
- 5.2.3 the Pupil complying with the obligations set out in clause 2 above. (Please also see clause 7.2.1 below.)

6. **Confidentiality:** The value and terms and conditions of the Award shall remain confidential to the parents/guardians and the pupil and the School.

7. **Termination of the Award:** The Award may be terminated on the following grounds:

7.1 **termination on financial grounds:** the School may terminate the Award on one term's notice in writing if, in the opinion of the School Governors acting in good faith:

- 7.1.1 the parents/guardians have not satisfied the School's financial requirements under clause 4 and clause 5.1; or
- 7.1.2 the School is no longer able to continue the Award under clause 5.2.1 or 5.2.2 above.

The termination shall take effect from the date set out in the written notice;

7.2 **termination on the grounds of conduct:** the School may terminate the Award by written notice sent to the parents/guardians with immediate effect if, in the opinion of the School 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/guardians and / or the pupil and the issue of a written warning; or
- 7.2.2 the parents/guardians have not complied with the obligations set out in clause 3; or
- 7.2.3 the parents /guardians 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/guardians withdraw the pupil from the School without providing proper notice.

7.3 **repayment of the Award:** the parents/guardians 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/guardians 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 7.2.1 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. **Cancellation and Withdrawal:** For the avoidance of doubt, the benefit receivable under an award will not apply to the Parents'/Guardians' liability to pay the first term's fees if less than a term's written notice of cancellation is given, or to any term for which the School requires payment of fees in lieu of notice following withdrawal without proper notice.

9. **Conditions of Award:** 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 School's *Terms and Conditions* as amended from time to time shall apply and these Conditions of Award shall be interpreted in accordance with them.