



L A L E H A M L E A

A Catholic Independent Primary School for boys and girls aged 3 to 11

Acting Headteacher: Mrs. M Reece

L A L E H A M L E A S C H O O L & N U R S E R Y

F E E R E D U C T I O N P O L I C Y

This is a whole school policy which applies to all sections of the school, including Early Years Foundation Stage, Out of School Care and Clubs.

	Date	Signed
Date reviewed	January 2025	<i>M Reece</i> Acting Head Teacher
Ratified by the Board of Governors	January 2027	<i>Y Epale</i> Chair of Governors
Date of next review	January 2027	



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Introduction

Laleham Lea School is a registered charity that is committed to providing public benefit and is aware of its obligations under the Charities Act 2011. 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.

We have two forms of fee reduction opportunities in place.

- 1) Sibling Discount
- 2) Bursaries

Bursaries

The Governors of the School are committed to broadening access to the school by offering to eligible parents or guardians means-tested financial support towards the payment of tuition fees. Such support is known as a Bursary and Bursaries may be awarded in the form of a discount on tuition fees payable, depending on the financial, compassionate or other pertinent circumstances of applicants. Additional activities, such as after school care (Late Leavers/Breakfast Club), clubs and individual music lessons, are not included in Bursary Awards.

Bursary Awards are subject to repeat testing of parental means each year and may be varied upwards or downwards, depending on parental circumstances Awards are made on the basis of the school's confidential scale of awards which sets out award levels in relation to a family's financial circumstances.

Information provided by the school alerting the parents/guardians of pupils to the possibility of gaining means-tested financial support with the payment of schools fees is included in:

- Our Admissions Policy
- On the school website.

The Application Process

Bursaries may be made available to parents/guardians of a child in any year group from Reception up to Year 6 of Laleham Lea School. Bursaries are awarded at the discretion of the Governors. The Head and Bursar are responsible for the management and coordination of the following process:

1. Parents/guardians seeking a Bursary are required to contact the School Finance Officer and request a Bursary Application Form pack. The Bursary Application Form seeks to establish the financial circumstances of the household. The form, which requests details of income and



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capital, may be found at Appendix A and must be accompanied by full documentary evidence. The completed forms, together with the necessary documentary evidence, are to be submitted directly to School Business Manager.

2. The School Finance Officer assesses the financial review in order to establish the likely level of support which will be required in order to allow the child to continue to attend the School
3. The School Finance Officer prepares a recommendation which is considered with the Head and a joint recommendation is then reached
4. The joint recommendation is presented to the Chair of Governors for approval
5. The parents or guardians are advised whether their child is to be offered the Bursary Award.
6. Parents or guardians are then required to sign a letter the award and an acknowledgement agreeing to any conditions relating to the Bursary Award.

The Case for Assistance

The Head and Bursar 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 school is the first consideration in granting support.

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 the 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 Bursary grants are well focused 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 equity values in houses.



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- 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's grant 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 Bursary:
 - Frequent or expensive holidays.
 - New or luxury cars.
 - Investment in significant home improvements.
 - A second property / land holdings.

Other factors

It is recognised that, in addition to financial constraints, there may be other circumstances which should be considered. These include, but are not limited to:

- Where a parent/guardian is terminally ill or is unable to secure permanent employment due to poor health.
- Parents/guardians with a child at the school, whose financial circumstances suddenly change
- Where a separation has resulted in the child having to be withdrawn from the school, adding to the stress of coping with the parents/guardians separating.

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, as we are aware family circumstances may change. Current Bursary holders will be issued with repeat means-testing forms each year. For those previously in receipt of Bursaries, the Head and School Business Manager, in making their joint recommendation to the Governing Body Awards Panel, have the discretion to recommend 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 school, for example, by the late payment of any contribution they are making to the fees.

Confidentiality

Bursary awards made by the school are conditional upon the recipient(s) acknowledging that the award is and will remain confidential as between themselves and the school.



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The school will require recipients to accept not to disclose either the fact of the award or any of the terms which have been agreed between themselves and the school, without first obtaining the prior consent in writing of the School Business Manager.

Linked Policies

Admissions Policy



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Appendix 1

L A L E H A M L E A S C H O O L

29 Peaks Hill, Purley, Surrey, CR8 3JJ



BURSARY APPLICATION FORM

(New applicants)

Confidential Statement of Financial Circumstances

Please read the Guidance Notes at the end of this document before completing this form



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Assessing your application – Data Protection considerations

The school reserves the right to make all decisions regarding your application for a Bursary. This means that, for the purposes of your application:

- The school is the Controller of your information
- The school is the Processor of your information

Please note that no application will be considered unless the process as detailed below is followed.

IN MAKING THIS APPLICATION AND COMPLETING THIS FORM YOU WILL BE TAKEN TO HAVE CONSENTED TO THE PROCESSING OF FINANCIAL AND PERSONAL DATA RELATING TO THE APPLICANTS, PERSONAL DATA RELATING TO THE CHILD, AND SENSITIVE PERSONAL DATA RELATING TO THE APPLICANTS AND THE CHILD. RELEVANT INFORMATION MAY BE OBTAINED FROM THIRD PARTIES.

YOU ARE ALSO TAKEN TO HAVE CONSENTED TO THE FOLLOWING PROCEDURE:

1. An Application Form will be completed and sent either to the School Finance Officer as detailed at the bottom of the form. Supporting paperwork as required must be included.
2. Any original documents will be stored securely under lock and key and then returned to you when the process is completed.
3. Your electronic records will be kept securely on the school system, password protected, and will be deleted four years after they are no longer required.

Please be assured that this process is undertaken for the purposes of considering your application for a Bursary only, and your information will not be passed to any third party or used in any other way whatsoever.

You are entitled to request that your information be deleted permanently at any time.

I/we have read the above and consent to my/ours and the child's/children's information being processed in the manner described above:

FATHER/STEPFATHER

MOTHER/STEPMOTHER

Date: _____



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1. CHILD

Full Name(s)	
Date of Birth	
Childs Year Group	

2. PARENTS

	Father/ Stepfather	Mother/ Stepmother
Title		
Names		
Address		
Occupation		
Employment Status	Retired – Self-employed – Employed – Unemployed (please circle)	Retired – Self-employed – Employed – Unemployed (please circle)
Employer name		
Are you a Co. Director?		
Daytime Tel		
Evening Tel		
Mobile		
E-Mail		

3. INCOME

<i>Please use annual amounts</i>	Father £	Mother £	Combined £
Gross salary			
Business profits or self-employed earnings			
Gross pensions			



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Gross investment income			
Gross rents received			
Benefits received			
Maintenance received			
Court order / separation agreement - school fees receivable			
Family support			
Any other income			
Total			

4. OUTGOINGS

<i>Please use annual amounts</i>	Father £	Mother £	Combined £
Tax on incomes above			
NI contributions			
Pension contributions			
Mortgage payments on main residence			
Rental property expenses			
Household insurances			
Rent - main residence			
Council Tax and utilities			
Loan repayments			
Credit card repayments			
Food and subsistence			
Clothing			
Vehicle costs			
Leisure			



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Holidays			
Total			

5. CAPITAL ASSETS

Approximate market value	Father £	Mother £	Combined £
Bank / building society balances			
Equity / bond values			
PEPs/ISAs/TESSAs			
Pension schemes			
Value of main residence			
Value of other properties			
Value of vehicles			
Net worth of business			
Redundancy settlements due			
Insurance settlements due			
Total			

6. CAPITAL LIABILITIES

<i>Please use annual amounts</i>	Father £	Mother £	Combined £
Mortgage amount outstanding			
Mortgage outstanding on other properties			
Loans			



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Credit cards			
Finance leases			
Total			

7. SUMMARY

<i>Please use annual amounts</i>	Father £	Mother £	Combined £
Income			
Deduct Outgoings			
Total			
Capital Assets			
Deduct Capital Liabilities			
Total			

Please indicate on a separate page if necessary why net assets cannot be converted or used to pay school fees

STATEMENT OF AIM

Please indicate how much you feel you can contribute towards school fees each term:



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DOCUMENTS TO BE SUPPLIED

Please supply originals of the following documents:

- Last 3 pay slips
- Last P60 Latest audited accounts (if appropriate)
- Latest management accounts (if audited accounts are more than 9 months old)
- Latest self-assessment tax calculation (if appropriate)
- Schedule D self-employment income declaration (if appropriate)
- 3 months' bank statements
- Proof of value of investments (may include internet valuation)
- Latest pension and endowment valuation
- Benefit letters (if appropriate)

- Latest mortgage statement (on all properties if appropriate) / rent agreement
- Latest loan statements
- Contents insurance schedule

- Legal financial agreements

- Any other appropriate documents to support your application

ALL DOCUMENTS WILL BE RETURNED SECURELY ONCE THE APPLICATION HAS BEEN PROCESSED

YOU WILL BE NOTIFIED OF THE FINAL RESULT BY THE SCHOOL DIRECTLY



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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 we/I are/am applying 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 termly 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 forms on the forms sent to us/me by the school or its agent and supply all relevant supporting evidence by the return date indicated
- c) We/I 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 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 or its agent 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 the award

Signatures:

Father / Stepfather _____ Date _____

Mother / Stepmother _____ Date _____

If the above declaration is signed by only one parent, please give reason by deleting as necessary below:

Divorced / separated / widowed

Other (state reason)

Please return this form and all documents to:

Ms Lambert, School Finance Officer, Laleham Lea Primary School, 29 Peaks Hill, Purley, Surrey. CR8 3JJ