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Local Government and Communities Committee
Scottish Parliament
Edinburgh
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(by-email)

8 July 2019

FOLLOW-UP TO EVIDENCE TO THE COMMITTEE ON 19 JUNE 2019

Thank you for your letter of 20 June, seeking information further to the evidence session on 19 June on the Non-Domestic Rates (Scotland) Bill. You requested:

1. The link to access the Freedom of Information request from the Scottish Government in relation to the Barclay Review and independent schools.
2. The percentage and number of pupils per school receiving bursary or partial bursary provision.
3. The number of bursaries or partial bursaries that are awarded to pupils for reasons other than for academic merit for example additional support needs.

1. My recollection is that the original FOI response is this one:

<https://www.oscr.org.uk/media/3096/combined-info-release.pdf>

As you will see, the response was made by OSCR itself, rather than the Scottish Government as I had suggested to the Committee. The two articles that it prompted are:

<https://www.heraldscotland.com/news/15923064.two-tier-charity-warning-over-private-schools-rates-relief-cut/>

<http://thirdforcenews.org.uk/tfn-news/oscr-feared-private-schools-ruling-would-create-two-tier-charity-system>

2. SCIS figures for bursary assistance are cumulative figures for the sector, rather than by school. However, detailed breakdowns of each school's financial support in terms of pupil numbers, percentages and overall financial figures are available in school Annual Reports, all of which are also available on OSCR's Register.¹ Many schools also post detailed public benefit reports on their own websites.

In terms of specific bursary provision across mainstream schools (i.e. excluding sibling or staff discounts, scholarships or other financial assistance) the total amount is c.£28,250,000 for 2018-2019.

All financial assistance provided by schools amounted to over £51,109,000 for the same year, of which more than 60% was means-tested.

¹ <https://www.oscr.org.uk/search/register-search/>

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547 primary school pupils receive means-tested bursary assistance, 2,483 secondary pupils receive means-tested bursary assistance, while 6,818 mainstream pupils receive financial assistance of some kind.

3. In terms of bursaries or partial bursaries awarded to pupils for reasons other than academic means, such as additional support needs, it is important to stress that such bursaries are awarded through means-testing alone, but other needs and abilities such as additional support needs are assessed as part of the overall admissions process.

I thought it would be useful to include the specific policies of individual schools – large and small – that were able to respond before the end of term:

- i. *We have 145 bursary holders this year and none of these are awarded on academic merit. Applicants simply need to be able to meet our entrance requirements and give us confidence that they will thrive at our schools – it is entirely down to means-testing. I've attached our Bursaries and Scholarships Policy in case this might be of any further help in confirming the lack of selection on academic merit.*
Bursaries may be awarded in the form of a discount of up to 100% on tuition fees payable, depending on the financial, compassionate or other pertinent circumstances of applicants.
Applicant parents or legal guardians are required to complete a very detailed declaration of their means, disclosing full details of their income, expenditure, assets and liabilities. On the basis of this declaration, consideration of any additional compassionate or other pertinent factors, and the availability of funding, awards are made.
Bursary awards are subject to repeat testing of parental means each year and may be varied upwards or downwards, depending on parental circumstances.
Full documentary evidence is required to support declarations of parental means as part of a full audit of declarations undertaken in the course of the scrutiny process. The schools reserve the right to withdraw bursaries and, where appropriate, require recipients to pay full fees, if suitable and satisfactory documentary evidence is not provided.
Each pupil to whom support is offered must, in the opinion of the Headmaster of the Junior School or Heads of the Senior Schools, and that 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 schools. The Headmaster of the Junior School and Deputy Heads must be satisfied, from available evidence, that the applicant will both benefit academically and socially from attending the schools, and make a positive contribution to the schools. Previous school reports should be consulted for evidence of good behaviour.
The list of award holders may vary over the year, after screening and announcement of awards, depending on changing parental circumstances, pupils opting to leave school and other factors, including recipients' conduct and performance.
- ii. *Means tested bursaries of up to 100% remission of fees may be awarded to pupils who do well in the entrance examinations for 6 Junior, 7 Junior and 1 Senior, and whose*

families cannot afford the full school fees. Exceptionally, bursaries may also be awarded to older age groups.

Parents will be asked to complete and submit a comprehensive questionnaire about their family's income and expenditure, for which the school reserves the right to appoint an independent financial assessor. The Bursar will then establish financial need against a sliding scale. Candidates will be prioritised, starting with the pupil with the highest score in the entrance examinations. The Head will assess the value of school reports and examination performance for older age groups, and make recommendations on the overall priority.

- iii. The school only awards bursaries by means-testing, we have no other bursaries/scholarships on any other need or ability. In the coming academic year 2019/2020 the school is offering 30 families bursary funds - assisting 36 children to remain in the school and 3 new starters. Last academic year 2018/2019 the School offered 30 families bursary funds – assisting 33 children to remain in the school and 2 new starters. Prior year 2017/2018 the School offered 31 families bursary funds – assisting 34 children to remain in the school and 4 new starters.*

In addition to this, we also offer family support funds during each academic year for families within the school who find themselves in sudden financial difficulty during the year. This is assessed on current financial circumstances of family and is used to ensure children's schooling is not interrupted. In 2018/2019, the School assisted 11 children with family support funds.

Our numbers of bursaries and family support funds awarded amounts to between 14% and 17% of our total school role.

- iv. Means tested bursaries awarded to 38 pupils = £268,762.
Our rates will increase to £115k by August 2020 from a current £23k, significant to a small school.*

The school has an open admissions policy whereby we admit by date of application only, not through assessment. We do not charge for Support for Learning sessions (for those who require additional help, or for those who are gifted/talented).

We do not provide academic scholarships.

- v. None of our 38 bursaries are awarded on academic merit.*
- vi. The school offers means tested bursaries totalling £428k (8.5% of gross revenue) to 63 pupils which is 25.2% of our pupil population. The average award per pupil totals £6,8k. All bursary requests are assessed on a means tested basis and are awarded irrespective of academic ability of the pupil.*

- vii. The Bursary awards process has two functions: firstly to decide the priority of who should receive an award and secondly the scale of the award. The Headmaster will review the academic and overall strength of the Bursary candidate, taking due cognisance of any social or educational circumstance and put the candidates in priority order. The Bursar and Finance Manager review the financial need of each candidate and allocate bursary funds appropriately and in accordance with any priority order given to them until such bursary funds as are available are exhausted.*

Where possible, Bursary Applicants must be registered for entry and have been offered a place at the School or have achieved the standard required for entry. A parent submitting a Bursary Application should be able to demonstrate that they are committed to sending their child to the school.

Bursaries are reviewed on a regular basis whereby parents are required to resubmit details of their financial situation to ensure that they still merit an award. While not linked to specific levels of achievement such as with a scholarship, any bursary award is based on the understanding that the pupil will by his/her application, behaviour and involvement in the School community merit such an award on an ongoing basis. Should the pupil's application, behaviour or involvement fall below the standards expected, the School reserves the right to remove the award.

Bursary applications for current pupils can be made at any time as the result of an unforeseen change in the family financial situation which leads to a genuine difficulty which would otherwise necessitate the removal of the pupil.

- viii. 37% of the pupil roll for the next academic session will be in receipt of a means-tested bursary. These bursaries follow an assessment of the financial need, considering both income and assets, and the merit of a place for the child at the school. This enables an assessment to be made as to the overall charitable need of the applicants. Means-tested bursaries look set to range from 5% to 100%, but these figures are not fixed (less, to some extent, the latter - we will always seek to support transformational bursaries wherever possible), as they are dependent upon the financial circumstances of applicants, which of course should differ each year.*
- ix. We award no bursaries on academic merit. All are means tested and our selection process is "financially blind". The overarching criteria is do we think is life changing. This is reflected in the range of awards that we make being dominated by the larger amounts they are life changing and cannot just be considered as a discount. Additionally for those on 100% some will receive additional support for items some as lunches and iPads and school trips that are part of the curriculum or considered critical to the pupils development in the School.*
- x. In the last year we have given a total of 56 awards. Out of these 22 were for people who have Support for Learning needs. The average award was 29%. These children are usually within the independent sector due to the smaller classes and their difficulty getting the support they need within the state sector.*
- xi. All our bursaries candidates sit an English and Maths test, as well as a CAT test, to assess their performance. Once that is established Bursaries are awarded covering 10% to 100% of the Tuition Fees based purely on an assessment of financial need. 74 of our pupils are currently in receipt of approximately £600k of Bursary support, over the past decade or so we have increased the Bursaries offered from around £115k.*
- xii. This academic year we had 14 financial assistance awards, equivalent to 12 full-time places. None of these were related to academic ability.*

- xiii. *All applicants sit our entrance test for S1. They are ranked on this performance, and with no other criterion used. We have limited bursary pot and then move down the list from top to bottom awarding transformational and partial bursaries until the pot runs dry. Those we cannot offer bursaries to are still offered a place, but we know that they may well not be able to accept.*
We do not look at any other skills e.g. sporting, or ESL, or ASN. However, none of these things would ever prevent a pupil coming.
Therefore we have a number of pupils, that it would take some time to identify, who have ASN and are in receipt of a bursary. However, they are not in receipt of a bursary because of their ASN.
- xiv. *We have 77 children on our support for learning register against a school roll of 189. Of these 77 children 19 (24.6%) receive bursarial support. 19 children make up 47.5% of the 40 bursary renewals we have carried out this year.*
- xv. *In terms of our current bursary provision circa 15% of these are for children with Additional Support Needs. It should however be noted that all of our Bursaries are means tested, as the overarching factor, although we do take into account academic performance, where appropriate.*

Please do not hesitate to get in touch if there is more detail we can provide.

Kind regards

John Edward
Director