



THE  
PORTSMOUTH  
GRAMMAR  
SCHOOL

## The PGS Financial Assistance with Fees Policy

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## 1. Introduction and policy aims

- 1.1. The Portsmouth Grammar School has a long history of providing financial assistance to enable students of all backgrounds to benefit from the outstanding education it provides.
- 1.2. The School actively welcomes applications from children who would only be able to take up their place with financial assistance, as well as from families of existing pupils at the School who encounter financial difficulty due to a change in circumstances.
- 1.3. This policy is intended to set out the process and criteria to qualify for financial assistance and help families understand the key factors that are taken into consideration. If you require any help or support with the process of applying for financial assistance, please contact the Admissions team on [admissions@pgs.org.uk](mailto:admissions@pgs.org.uk)
- 1.4. The Portsmouth Grammar School is an academically selective school, with selection based upon academic merit which is assessed through an examination, interview and references. This Policy should therefore be read in conjunction with the School's Admission Policy which sets out the selection process in detail. For the avoidance of doubt, all applicants for financial assistance must also be successful in the academic selection process, performing in the top quartile of applicants.
- 1.5. The School also offers scholarships for excellence in academic studies, music, art, drama and sport. These scholarships attract a nominal amount of fee remission, typically between 3% and 10%. More details can be found on the school's website.

## 2. Key principles

- 2.1. The School is a charity, and the funds for financial assistance come from donations and the school's annual operating budget. It is therefore extremely important that the limited funds available are allocated responsibly, with thorough consideration of each family's circumstances.
- 2.2. All awards of financial assistance are means-tested, which means parents (to include carers and legal guardians) are asked to answer detailed questions and provide evidence of their financial circumstances.
- 2.3. Each application is considered individually and a discount ranging from 10% to 100% of tuition fees may be awarded. Whilst the school is guided by the parameters set out below, the limited funds available mean that unfortunately it is not always possible to award financial assistance even when a family's circumstances falls within the parameters. All decisions are at the Head's discretion and are final.
- 2.4. Families who are awarded financial assistance are required to inform the School within a month of any material change in their circumstances which affects their ability to pay tuition fees. Awards of financial assistance are also subject to periodic review, usually annually, but at the discretion of the School. If a family's circumstances have changed significantly, the level of the award may be adjusted accordingly. Upon transition of the child from Year 11 into Year 12 families will need to reapply for financial assistance.

- 2.5. It is important that families are honest and open about their circumstances, and fully disclose all relevant information. If the school has reason to believe a parent has withheld or provided misleading information for whatever reason, no financial assistance will be awarded and any existing award may be withdrawn upon review.

### 3. Applying for financial assistance on entry to the School

- 3.1. Families of new applicants to the School in Years 7 and 12 may apply for financial assistance on entry. The deadline for applying for financial assistance will be in the September preceding the year of entry, and other deadline dates will be publicised on the school's website ([www.pgs.org.uk](http://www.pgs.org.uk)). Applications after the deadline may not be considered.
- 3.2. Whilst a family's financial circumstances are an important part of the decision-making process, there are a range of other factors that are also taken into consideration. The following list is provided as a guide to help families decide whether to apply for assistance, although it is important to understand that meeting these parameters does not guarantee assistance will be awarded.
- 3.2.1. Location: Priority will be given to families living within a reasonable daily commute of the School. As guidance this is generally considered to be a commuting time of 45 minutes.
- 3.2.2. Both parents working: Financial assistance will normally only be awarded where both parents are working and contributing to the household income, unless incapacitated or providing full-time care for pre-school age children or other dependants. In the case of separation or divorce, both parents would normally still be expected to contribute financially to their child's education and participate fully in the application for financial assistance.
- 3.2.3. Finances being responsibly managed and prioritising education: A family applying for financial assistance should be able to demonstrate that they are living within their means, with living arrangements and household expenditure that are affordable within the family's combined income. Assistance is unlikely to be awarded where families have prioritised expenditure on other activities ahead of their child's education, such as frequent or expensive holidays, new or luxury cars, significant home improvement works, or significant voluntary donations to other charitable causes.
- 3.2.4. Combined household income (before tax): As a guide, combined income up to £50k would likely be considered for a high percentage of fee assistance. Combined income of up to £80k would likely be considered for fee assistance, with the level of assistance dependent upon other factors.
- 3.2.5. Property: The level of equity held may impact the level of financial assistance offered, depending on other factors. Assistance is unlikely to be awarded where a family holds equity of more than £500k, or owns a property of similar value outright with no mortgage, or owns more than one property.

- 3.2.6. Savings and other assets: The level of assistance is likely to be reduced where a family has savings or investments of more than £10k, or £15k for a two-child family, or £20k for three or more children. Assistance is unlikely to be awarded where the family hold significant assets but are temporarily unable to access funds, although the School may be able to offer a payment plan in such cases.
- 3.2.7. Siblings and other school fees: Where a family already pays fees for a child at The Portsmouth Grammar School and subsequently applies for financial assistance on entry for a sibling, any assistance will be awarded to the older sibling and will cease when the older sibling leaves the School. Where a family already pays fees for a sibling at another school, it would be expected that the family would contact the school to request that financial assistance is shared between the two schools, rather than provided only by The Portsmouth Grammar School.

#### 4. The process of applying for financial assistance on entry

- 4.1. Open Afternoons are held throughout the year, when families are welcome to come and look around the School, talk to teachers and chat with existing pupils. Details are available on the school's website. Families are also very welcome to come for an individual visit which can include a discussion of potential financial assistance. Please contact the Admissions team on [admissions@pgs.org.uk](mailto:admissions@pgs.org.uk) to arrange.
- 4.2. All applicants must start with the Admissions application form, available [here](#). The form should be submitted by the normal deadlines for an application for a place, which is in September in the calendar year prior to the year of admission.
- 4.3. After submitting the online application, you will receive a confirmation of application, which gives details of when and how to apply for financial assistance.
- 4.4. The online fee assistance application form is provided by a specialist company (Applicaa+) and involves answering detailed questions and providing evidence of your family's financial circumstances. The process may involve a home visit from the school.
- 4.5. You will be notified of the outcome in the letter of offer of a place following the entrance assessments. You may be awarded financial assistance representing from 10% to 100% of the tuition fees.

#### 5. Applying for financial assistance due to a change of circumstances

- 5.1. Families of existing pupils may apply for financial assistance if they experience a significant change in circumstances beyond their control that causes difficulty in paying tuition fees, most likely through unexpected loss of income.
- 5.2. The first step is to contact the Bursar as soon as possible to discuss the change in circumstances and what financial assistance might be needed and for how long. The Bursar may arrange for means-testing to ensure the School has a clear picture of the financial impact of the change. Any financial assistance awarded will be for a defined period of time with an agreed date for review.

## 6. Allocation of Tasks and Version Control

### Allocation of Tasks

<b>Task</b>	<b>Allocated to</b>	<b>When / frequency of review</b>
Keeping the policy up to date and compliant with the law and best practice	Assistant Head (Admissions & Partnerships)	As required, and at least annually
Monitoring the implementation of the policy, relevant risk assessments and any action taken in response and evaluating effectiveness	Assistant Head (Admissions & Partnerships)	As required, and at least termly
Maintaining up to date records of all information created in relation to the policy and its implementation as required by the GDPR	Assistant Head (Admissions & Partnerships)	As required, and at least termly
Receiving/ reviewing input from interested groups (such as pupils, staff, Parents) to consider improvements to the School's processes under the policy	Assistant Head (Admissions & Partnerships)	As required, and at least annually
Formal annual review	Assistant Head (Admissions & Partnerships)	Annually

### Version Control

<b>Date of adoption/approval of this policy</b>	24 <sup>th</sup> November 2023 (Governing Body (Finance & General Purposes Committee)) (updated 10 <sup>th</sup> March 2024)
<b>Date of last review of this policy</b>	30 <sup>th</sup> October 2023 (SMT)
<b>Date for next review of this policy</b>	Summer 2024
<b>Policy author (SMT)</b>	Assistant Head (Admissions and Partnerships)
<b>Status</b>	Internal – Staff (PGS Online)
<b>Report</b>	Financial Report

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