



Transformational Bursaries: Frequently Asked Questions

Caterham School was founded on the belief that all children should be able to reach their potential through education no matter what their background. Since its founding in 1811, Caterham School has remained committed to opening our doors to talented young people, regardless of their family's means.

Throughout the generations, the school has continued to offer funded places to children with the support of charitable donations or government schemes. Offering these places is an important part of who we are as a school and as a community. We are proud that our alumni include sons of United Reform Church Ministers from England and Wales, Old Caterhamians who came to Caterham on a Direct Grant or another assisted place scheme, and the many men and women who have received bursaries since Caterham School merged with Eothen School and became co-ed in 1995.

How do bursaries and scholarships differ?

A bursary is different to a scholarship and/or any other fee reduction. Bursaries are means-tested grants which provide a complete or partial reduction in school and boarding fees for children from families with limited means. The overriding criteria for receiving a bursary is the financial circumstances of the family (which are assessed closely for each application), the benefit their son or daughter is likely to receive and the contribution he or she is likely to make to the life of the school.

Scholarships provide a capped reduction on fees awarded to recognize talent, accomplishment and potential across a range of different areas including academic, sport, performing and creative arts. Scholarships are not means tested.

What is a transformational bursary?

A transformational bursary provides full support for a child throughout their time at the school and is specifically for those families with extremely limited means.

What about the scholarships and standard bursaries already offered by the school?

Currently almost all bursaries are assisted places providing partial assistance with fees and are means tested on a family's income and assets. The amount of assistance offered provides a fee reduction on a sliding scale according to the results of our means test. As a guide, household income per annum (before taxes and benefits) is likely to be no higher than £60,000 to qualify for any assistance but a family with an annual income of £25,000 or less will receive substantial assistance.

The amount awarded is based solely upon financial circumstances. However, all Bursarial support requires pupils to successfully complete the Caterham School admissions procedure.

Temporary hardship bursaries may also be provided for a limited time for families experiencing an unexpected change in circumstances.

How many assisted places and transformational bursaries does Caterham currently offer and how are they funded?

At present we offer 50 bursaries in the senior school. They are provided to children who have excelled in the standard admissions procedure and who have met our means testing criteria. Of these 50 bursaries,

just 10 are transformational bursaries. The remaining 40 are assisted places providing a smaller discount on fees.

The school's bursaries are funded through historic donations and legacies to the school and charitable donations. Some historic gifts are held in restricted endowment funds.

The introduction of the Transformational Bursaries Fund is in addition to the school's current scholarship and assisted place offer.

What is the future plan for bursaries?

As an educational charity, Caterham School remains committed to providing bursary places. Education has the power to transform individual lives, and the entire school community benefits from widened access.

In a senior school of over 900 pupils, we do not believe that 10 transformational bursary places are enough. Each year we have to turn away talented children who we know would thrive here due to their families' lack of funds and assets. For this reason we have launched the Inspiring Education Transformational Bursaries Appeal. Our target is to provide 20 additional transformational bursaries by 2024, bringing the total number of fully funded bursary places at Caterham to 30.

With support secured, our aim is for two children to start in the first year of the senior school and two young people to start in the Lower Sixth each year from September 2019 onwards, rising to 20 additional children receiving fully funded places at the school by the start of the 2024 academic year.

To achieve our aim, we need to raise £2m in donations. Achieving our goal will be a vital step towards our ultimate goal of being able to open access to all talented children regardless of their financial circumstance.

How do we assess children who will receive transformational bursaries?

All applicants to Caterham School must successfully pass the admissions process. For those applying for a transformational bursary, the bursary team sensitively undertake means-testing where a wide range of factors are taken into consideration including, but not limited to, parental/guardian income, assets and liabilities and other matters particular to the child, such as family circumstances. The school employs the services of Bursary Administration Limited (BAL) to prepare the information on which a decision is made.

In most cases children who receive transformational bursaries are local, living in the communities and towns surrounding Caterham. Typically a child receiving a bursary will demonstrate academic ability and/or exceptional talent. They will have met the selection exam entrance criteria and be currently attending a state maintained school. Their parents will be in low income employment or unemployment. There will be no family savings or assets available. Their family circumstances may be challenging, including family illness, divorce and parental bereavement.

How will I know my gift is going to support a transformational bursary places?

Donations to the Caterham School Transformational Bursaries Appeal will be paid into a restricted Caterham School fund which is ring fenced for transformational bursary places. All donors will receive an annual report on how their donation has been spent.

I would like to make a donation to the Transformational Bursaries Appeal – how can I do that?

Thank you for your support. If you would like to make a gift please complete the Transformational Bursary Appeal donation form which can be found at www.caterhamschool.co.uk/supportus or contact Emma Collings, Development Manager, on 01883 335111 or email development@caterhamschool.co.uk

We welcome single gifts by bank transfer and cheque, as well as regular gifts by Direct Debit. We also welcome gifts of shares and property. If your employer offers matched giving this can be arranged too.

Can Caterham School claim Gift Aid on donations?

Yes. If you are a UK tax payer we can make your donation go further by claiming Gift Aid on your donation. Gift Aid allows UK charities to claim back basic rate tax already paid on donations by UK tax payers. Caterham School is a registered charity, number 1109508, which means the school can claim an additional 25p on every £1 donated. Higher rate tax payers can also claim tax relief on donations they make to UK charities.

I am resident in the USA, Hong Kong or China, can I make a donation in a tax efficient way?

If you are resident and pay tax in the USA, Hong Kong or China and would like to make a donation, please get in touch with Emma Collings, Development Manager, to discuss how you can make your gift.

I am interested in leaving a gift in my will to Caterham School, how can I arrange that?

A gift in your will can be a simple and tax-effective way of making a significant gift to the School. Any gift to a registered charity made in your will, whether in the form of cash, shares, property or other items, is exempt from inheritance tax. Caterham School is a registered charity No. 1109508.

We appreciate that making a will is a highly personal matter, but should you decide to leave a gift to the school, we would love to know – this will give us the opportunity to thank you and show you how your gift will make a difference. For information about how to leave a bequest to Caterham School please visit <https://www.caterhamschool.co.uk/support-us/legacy/> . You can also contact Emma Collings, Development Manager, on 01883 335111 or email development@caterhamschool.co.uk

How will my gift to the Transformational Bursaries Appeal be recognised and will I be kept updated about the appeal?

Appeal supporters will receive an annual report and will receive regular updates.

All donors to the Transformational Bursaries Appeal will be recognized as supporters to the appeal, unless otherwise requested.

I would like to make a donation to support another area of the school's work, can I do that?

Yes you can. If you would like to make a donation in support of another area that interests you please get in touch with Emma Collings, Development Manager, on 01883 335111 or email development@caterhamschool.co.uk