



Wells Cathedral Chorister Trust ('the Trust') – Bursary Policy

Approved by the trustees of the Trust on:(date)

Next scheduled review date:

The School Bursar – The Bursar of the School

The Cathedral – Wells Cathedral

Choristers – Choristers at the Cathedral

The School – Wells Cathedral School Ltd (registered charity no: 310212)

1. Purpose

This Policy provides the basis on which the trustees consider and determine applications for bursary and scholarship grant funding to the School towards school fees for choristers of the Cathedral.

2. General

2.1 Choristers must be pupils at the School and school fees are charged to each chorister family. Currently all the choristers benefit from a 25% automatic reduction in fees and there is an additional 50% off boarding fees for choristers who need, or wish, to board. To assist children to become choristers and study at the School, where families cannot afford to pay the full fee, bursary funding towards these fees is made available by the Trust.

2.2 The Trust can part fund a chorister's fees, taking into account funding available towards fees from other sources. This ensures the Trust can support as many choristers as possible.

2.3 Selection of choristers is a matter for the Cathedral and not determined by the Trust.

2.4 Without the support of the Trust a significant number of choristers each year would not be able to attend the School and participate in the Cathedral Choir.

2.5 Other cathedrals offer a much higher headline discount or scholarship for choristers. This makes it difficult for the School and Cathedral to attract the best candidates. Funding from other sources, including the Trust, helps address this challenge.

2.6 Historically there has been space for 36 choristers. From September 2023 this is to be reduced to a maximum of 30 choristers. The School and the Cathedral aim to increase the automatic discount or scholarship to 33%.

3. Bursary sums

3.1 From September 2023, the Trust aims to offer a scholarship payment of 6% of fees (the **Scholarship**) for every chorister. For relevant choristers with greatest financial needs, additional support can be given as set out in this Policy. Chorister families will be encouraged to decline this 6% Scholarship if they are financially secure.

3.2 In addition, individual choristers may receive a bursary funded by the Trust (the **Bursary**). These are made at the discretion of the trustees, at levels decided by them, subject to availability of funds and taking into account the other funding sources available for chorister fees.

3.3 The trustees prioritise additional support for choristers with greatest financial needs. Where possible they also take into account particular added needs, such as (but not limited to) disadvantage through disability, those who have been in care or fostering and those who come from sections of the community under-represented in the Cathedral choir.

3.4 Bursary levels are reviewed annually and adjustments made as appropriate, taking account of other available funding sources, and the level of fees set by the School for the year in question.

3.5 The Bursary sums are paid throughout the chorister's time in the choir, unless circumstances change so there is no longer a need for support.

3.6 Decisions about bursary levels are taken each year by the trustees, following recommendations by the Bursary Group (see 4.3 below). The relevant sum is then included in the Trust's annual budget.

4. Process for authorising bursaries

4.1 The Bursary application process is initiated by the Coordinator of Choristers, a School staff member. On receipt of a financial circumstances assessment report from a specialist independent company (currently Bursary Administration Limited), applications are made to other external organisations by the School on the families behalf. The School also helps chorister families to make applications themselves where the bodies concerned only accept applications from the beneficiaries themselves. Once sufficient information about financial need and initial responses from other awarding bodies is known, the School then considers the resultant financial situation, with the School Bursar and the Co-Ordinator of Choristers alongside the Precentor of Wells Cathedral (a member of the Wells Cathedral Chapter and a trustee of the Trust) and the Cathedral's Director of Music. At this stage there are three further sources of funding to consider: a School bursary, additional Chapter support or a Bursary from the Trust. At this stage, written recommendations are given to the Trustees of the Trust for their consideration.

4.2 It is recognised that the identity and other sensitive personal details of individual choristers and their families, including financial circumstances, need to be kept confidential and this is respected. However, the Bursary Group and/or the Trustees of the Trust must be provided with sufficient evidence of need to enable them to make recommendations and decisions respectively. Where appropriate anonymised records can be provided or separate confidential records as necessary to evidence the basis for these may be held securely, in a location specified in the minutes of relevant meetings.

4.3 The Bursary Group comprises **the Chair and Treasurer of the Trust and at least one** additional trustee appointed to the group by the trustees. Provided that there may be changes amongst the Group to address conflicts of interest (including conflicts of loyalty) as set out in this Policy. The quorum for its meetings is three. Its remit is to make recommendations for bursaries, changes to them and the annual review of existing bursary levels, including the annual inflation review.

4.4 No trustee with a conflict of interest (including a conflict of loyalty) may serve on the Bursary Group, this includes (but is not limited to) the Precentor of the Cathedral (who is an ex officio trustee of the Trust) and any trustee who is a current chorister parent, grandparent, great-grandparent, carer or guardian of a chorister (or in a comparable role) or who is serving as or becomes appointed a School governor. A trustee (including the Chair or Treasurer) who is a School Governor but not in any of those family or responsible adult relationships to a chorister may not serve on the Bursary Group as they are deemed conflicted because of their role as a governor. If already serving when the conflict arises, they must leave the group whilst the conflict remains and the trustees must appoint another non-conflicted trustee to serve in their place. When the conflict has ended, if the person is Chair or Treasurer they will automatically re-join the group and their replacement will leave. If they are another trustee they may, but do not have to be, re-appointed to the group and their replacement leave it, if the trustees so decide.

4.5 The Precentor and/or School Bursar may be invited as a guest to attend any meeting of the Bursary Group to provide information and answer questions about bursary requests. They shall absent themselves when the group discusses and makes decisions about the requests.

4.6 The Treasurer, if currently not serving on the Bursary Group due to a conflict of interest (including a deemed conflict because they are a School governor), may be invited to provide financial information and answer questions from the Bursary Group. They may also be invited as a guest to attend any meeting of the group to provide information and answer questions about bursary requests (except any request relating to a chorister to whom they are related). They shall absent themselves when the group discusses and makes decisions about the requests.

4.7 The Precentor is an ex officio trustee of the Trust and a member of the Chapter of the Cathedral and has an inherent conflict of interest in consequence. They may provide relevant information and may answer questions about bursary requests and other bursary matters but must then absent themselves from that part of discussions and decisions of the trustees

relating to bursaries, including but not limited to discussions and decisions about recommendations of the Bursary Group and about the Trust's Bursary Policy.

5. Other

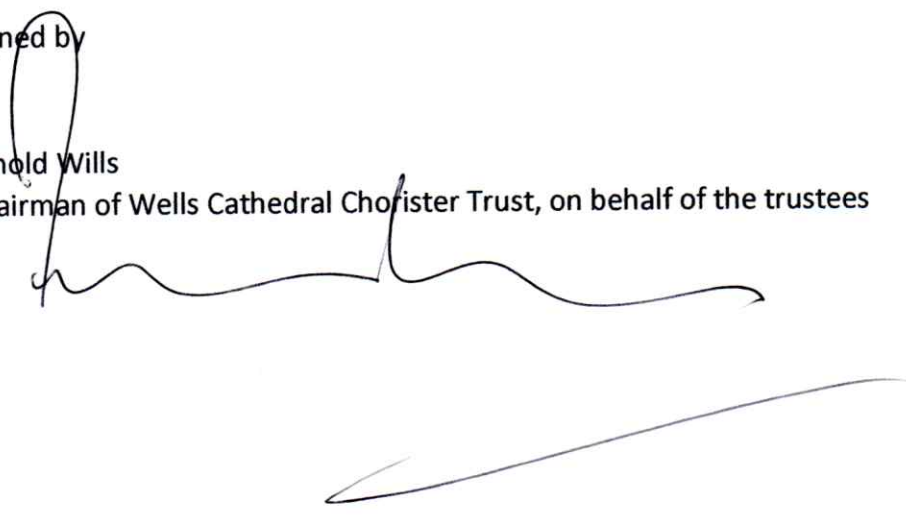
5.1 Bursaries and Scholarships are paid to the School on a termly basis, following receipt of relevant invoicing documentation and verification of the amount by the Trust.

5.2 No direct requests for bursaries or hardship payments can be accepted from families of choristers or other sources.

Signed by

Arnold Wills

Chairman of Wells Cathedral Chorister Trust, on behalf of the trustees

A handwritten signature in black ink, appearing to read 'Arnold Wills', is written over the printed name. Below the signature is a long, horizontal, slightly wavy line, possibly a flourish or a separator.