

S. Anselm's School Trust Ltd : public benefit plans 2010



1. Background

In July 2009 the Charity Commission published its findings from its public benefit assessment of S. Anselm's School Trust Ltd ('the charity'). We found that it was a charity but that it was not operating for the public benefit in relation to principle 2b (the opportunity to benefit must not be unreasonably restricted by ability to pay any fees charged) and principle 2c (people in poverty must not be excluded from the opportunity to benefit). To address this finding, we said that the governors must:

'produce a revised plan showing that the totality of benefits can be described as providing a sufficient opportunity to benefit in a material way for those who cannot afford the fees, including people in poverty.'

The governors confirmed within three months of the report's publication their intention to produce a plan for agreement and we have now considered this.

2. Charity Commission's conclusions June 2010

The Commission has now concluded that, based on the totality of benefits and the particular circumstances of the charity, the finding of the public benefit assessment published in July 2009 has been addressed and that the trustees are carrying out their duty to administer the charity for the public benefit.

We set out below the key factors on which we based our conclusions.

3. Key factors

3a. Changes to means-tested assistance

The charity has already made some changes and the table below sets out all the changes that will have been introduced between the time of the assessment report and academic year 2011 / 2012. Those marked with * have already been introduced.

Key feature	Position in 2008 / 09 (actual)	2011 / 12 (planned)
Advertised value of bursaries*	Up to 90% of fees	Up to 100% of fees
Tenure of awards* <i>Note – as recorded in the original assessment, the charity has arranged for pupils who are funded by bursaries to have the option of continuing their education at a choice of six independent senior schools on the same bursary terms as provided by the charity</i>	From age 8 through to leaving	From age 7 through to leaving

Key feature	Position in 2008 / 09 (actual)	2011 / 12 (planned)
Number of bursaries awarded <i>Note – the charity is implementing its existing plan to add one bursary per year until there is one bursary place in each school year. The governors aim to introduce a second bursary per year when financial circumstances improve. In addition, from 2010/11 there will be up to two ‘Headmaster’s bursaries’ awarded. The charity is also registered with the Joint Educational Trust¹</i>	0.8% of pupils	3.6% of pupils
Total percentage of pupils supported by means-tested awards <i>Note – this includes the 2 hardship awards included in the plans.</i>	1.2%	4.6%
Total value of means-tested awards as a percentage of gross fee income <i>Note – this includes 0.2% of gross fee income for hardship awards</i>	0.8%	2.5%

The charity will fund most of its bursaries through its Bursary Fund which was set up in 2004, with some further funding from its reserves. The value of the Bursary Fund on 31 July 2009 was £156,000 and the charity has a continuing programme of fundraising to support it.

3b. Total of all financial assistance. In addition to means-tested assistance, other financial assistance is also available in the form of scholarships² and the Continuity of Education Allowance (CEA)³. These are not exclusively available on a means-tested basis, but do add weight to the way in which the charity addresses sub-principles 2b and 2c. This table shows the total value of financial assistance and numbers of pupils supported from all sources.

Values and numbers	2008 / 09 (actual)	2011 / 12 (planned)
Total percentage of pupils supported	7.8%	11.3%
Total value of all financial assistance as a percentage of gross fee income	2%	3.7%

In considering the plans for financial assistance, we noted the changing economic circumstances and the decline in pupil numbers and income. We noted that in other respects, the general circumstances of the charity remained as reported in section B of the original assessment.

¹ JET provides support (including means-tested help with fees) for children who have suffered seriously at home or at school or are at risk in some way.

² Funding of scholarships is being phased out by 2014 – savings will be used for bursaries

³ The CEA is funded and operated by the Ministry of Defence (MOD) to assist families in the armed forces with the cost of educating their children if they are posted abroad. It is available to all ranks and is not means-tested. Personnel who use the scheme to send their children to S. Anselm’s pay 10% of the fees as a result of a grant from the MOD and 20% fee reduction from the school. Where parents are unable to pay the remaining 10%, S. Anselm’s is prepared to help them.

3c. Changes to the other opportunities to benefit provided by the charity. This table shows the main categories of 'other opportunity to benefit' provided by the charity and the changes that have been made. The detailed activities are listed in Annex A, section 3 of original assessment.

Category of opportunity	Change / additions
<p>Use of facilities by children who live locally <i>Note - the strategic approach mentioned at point 1 applies to the events offered by the charity and is as follows:</i></p> <ol style="list-style-type: none"> 1. <i>the events must be numerically significant: to appeal to and attract significant numbers of children;</i> 2. <i>the events must be accessible to all: ideally free to all and widely advertised;</i> 3. <i>the events must be purposeful and worthwhile: an experience that children would be unlikely to get in the normal course of affairs and therefore an experience that would be worthwhile educationally;</i> 4. <i>the events must be strategically focussed: events that fit S. Anselm's' plan of targeting the spheres of sports and music.</i> 	<ol style="list-style-type: none"> 1. Introduction of strategic approach (see note opposite). 2. Commitment to run at least one sports coaching event each term for children free of charge. 3. Renewed contact with local clubs and church groups to explore further. opportunities for use of facilities by children 4. Letting of pool to swimming clubs for junior swim training, and to mother and toddler groups. 5. Plans to develop astroturf pitch which will be available for local children as well as pupils.
<p>Hosting events with other schools <i>Note - this includes hosting sporting festivals and tournaments in which local primary schools participate; a joint concert with the choir of another school; and a joint outdoor adventure activity trip for another school.</i></p>	<p>These are described in Annex A, section 3 of the original assessment and we took these into account. There has been no material change.</p>
<p>Formalised ways of sharing knowledge, skills and experience with other educational providers <i>Note - this includes work placements for student / trainee teachers.</i></p>	<p>These are described in Annex A, section 3 of the original assessment and we took these into account. There has been no material change.</p>