



# **PLYMOUTH COLLEGE**

## **Public Benefit Policy**

# Public Benefit Policy

1. Introduction.....	3
2. Plymouth College and St Dunstan’s Abbey Schools Trust .....	3
3. Public benefit requirements .....	5
4. Public Benefit strategy.....	5
5. Bursaries .....	6
6. Other opportunities to benefit .....	7
7. Funding public benefit activities.....	8
8. Charity Commission guidance.....	9
9. Recording, reporting and accounting.....	9
Appendix 1 Activities which will/will not count as a public benefit	11-12
Appendix 2 Public benefit register [ <i>example only</i> ]	13
Appendix 3 Governors’ Annual Report [ <i>summary of required statements</i> ]	14

## **1 Introduction**

- 1.1 This Public Benefit Policy (“**Policy**”) has been prepared by the Trustees (the “**Governors**”) of Plymouth College and St Dunstan’s Abbey Schools Trust (the “**Charity**”).
- 1.2 It contains both :
  - 1.2.1 A strategy as to the Charity’s objectives in the context of public benefit in the longer term (the “**Strategy**”); and
  - 1.2.2 An agreed policy for the Governors to follow to ensure compliance with the public benefit requirements in furtherance of the Strategy.
- 1.3 The key elements of the Strategy are set out in section 4 below. Further detail as to the actions the Charity will take on an annual basis in furtherance of the Strategy are set out in Section 5 (Bursaries); Section 6 (Other opportunities to benefit); and Section 7 (Funding public benefit activities).
- 1.4 This Policy should be read in conjunctions with the School’s Bursary Policy. This Policy and the Bursary Policy will be reviewed bi-annually by the Governors.
- 1.5 Each new Governor will be provided with a copy of this Policy and the Charity Commission’s guidance on public benefit.

## **2 Plymouth College and St Dunstan’s Abbey Schools Trust**

### **2.1 Objects and Activities**

- 2.1.1 The object for which the Charity is established is the advancement of the education of boys and girls in accordance with the principles of the Christian faith and in particular but without prejudice to the generality of the foregoing to provide and conduct a day or a day and a boarding school or schools in which religious instruction is given in accordance with the doctrines of the Church of England and any ancillary or incidental and other associated activities for the benefit of the community.
- 2.1.2 In furtherance of the Objects, the Charity’s main activity is operating an independent school for pupils (boys and girls) aged 3 to 18.

### **2.2 Existing public benefit provision**

- 2.2.1 In the previous financial year 2008-9, the school educated 560 pupils. Whilst the Governors acknowledge that mitigating the cost to the state of educating those pupils does not, in the Commission’s view, constitute public benefit, the reality is that the cost of educating these pupils did not need to be met out of public funds (except to the extent of the Charity’s eligibility for exemption from tax on its surplus income).

2.2.2 Of the pupils educated at the School in the 2007-8, 22% of the total number of pupils received some degree of financial assistance from the Charity.

2.2.3 The Charity also has a long tradition of carrying out other activities for the benefit of the community. In particular :

- Numerous Charity fundraising events
- Many Local and Regional sports organisations use school facilities
- Gambia scheme
- PGCE Student support
- Facilities used for external examinations by many regional and local organisations
- School provides Governors and trustees to several local schools and charities
- DoE ranger service – Conservation issues inside National Park
- DoE Jubilee Challenge – Working with Special Needs children
- DoE Service School
- IB CAS – 1<sup>st</sup> Aid in Community
- Plymouth Leander – Swimming
- JSLA for our pupils working with local school
- Local School Swim Gala
- BTEC Course (Yr 11) use of Whiteworks
- Providing facilities for External music exams
- Ford Park Oral History Project
- Public music performances in parks
- Stoke Damerel CCF project
- Regional Linguafest organisation and provision of facilities
- Young Enterprise – joint venture with pupils outside school
- Science Day at Holberton Primary School
- CCF Remembrance participation
- Loan of mini buses to Primary schools
- Oxbridge preparation for students in Maintained sector
- Loan of Sports Pitches for local Primary Schools' Sports Days

## **2.3 Economic factors**

2.3.1 The Governors are mindful of the need to balance the quality of educational services the Charity provides against the fees charged to parents for those services. Both of these factors also need to be balanced against the need to provide public benefit.

2.3.2 The Charity operates in a competitive market in which there are not only other charities but also commercial operators running non-charitable independent school for profit. The Governors need to have regard to competitive pressures in this market and the financial resources the Charity has to carry out its Objects.

2.3.3 The Governors acknowledge that the Charity does need to charge fees in order to generate sufficient income to advance its charitable educational objects, and therefore full fees will need to be charged to the majority of parents.

- 2.3.4 In the previous financial year, the total income of the Charity was £7,847,515. 95% of this income derived from fees, 0.5% from donations, 3% from non-charitable trading and 1.5% from other sources.
- 2.3.5 The Charity has historically set aside a proportion of its income to fund means-tested bursaries, and is committed to continuing [and extending] the provision of bursaries in accordance with the Strategy. The value of the means-tested bursaries provided in the previous financial year represented 6% of the Charity's total income in that year.

### **3 Public benefit requirements**

- 3.1 The Governors are familiar with the long-standing principle that charities must exist for the benefit of the public and have a long tradition of providing public benefit, both through educating pupils at the School and through associated activities for the benefit of the wider community. They have also been following developments in this area, resulting from the Charities Act 2006 and publication by the Charity Commission of guidance relating to public benefit.
- 3.2 The Governors must have regard to the guidance on public benefit published by the Charity Commission and report annually to the Charity Commission on the public benefit the Charity provides.
- 3.3 In particular, the Governors are mindful of the following key principles which can be drawn from the Charity Commission's guidance :
- 3.3.1 the public benefit a charity provides must be related to its objects; and
- 3.3.2 a fee-charging independent school must demonstrate that there is sufficient opportunity to benefit from its educational services and facilities for those who cannot afford the fees, including those in poverty.

### **4 Public Benefit strategy**

- 4.1 The Governors have agreed the Strategy in order to :
- 4.1.1 Widen pupil access to the School and ensure that children who could not otherwise attend the School can benefit from the education it provides to its pupils.
- 4.1.2 Continue the Charity's tradition of providing public benefit.
- 4.1.3 Meet the Charity Commission's public benefit requirements applicable from time to time.
- 4.2 The key element of the Charity's Strategy are as follows :

#### **4.2.1 Bursaries**

- (a) The Charity will continue to provide means-tested bursaries to the parents of pupils who would otherwise not be able to afford the School's fees.
- (b) The value of bursaries could be up to 100% of full fees.
- (c) Additional assistance will also be made available to parents to assist with the associated costs of their child's education.
- (d) The proportion of the Charity's income which will be allocated to fund means-tested bursaries will be determined by the Governors in respect of each financial year.

- (e) The Charity's aim is to allocate not less than 5% of its total income in each financial year to fund means-tested bursaries

This is explained in more detail in section 5 below.

#### **4.2.2 Other public benefit activities**

- (a) The Charity is committed to continuing and expanding the activities it currently carries out to benefit children other than pupils at the School.
- (b) All such activities the Charity carries on must relate to the Charity's Objects.
- (c) The focus shall be on those activities which will provide the most public benefit for minimum opportunity cost.

This is explained in more details in section 6 below.

#### **4.2.3 Funding public benefit provision**

- (a) The Public Benefit Budget will identify the total amount or proportion of the Charity's sources of income) which will be used to fund its public benefit provision.

This is explained in more detail in section 7 below.

### **5 Bursaries**

#### **5.1 Introduction**

- 5.1.1 The Charity provides bursaries on a means-tested basis as this is most likely to provide an opportunity to benefit for those children whose parents who would not otherwise be able to afford the School's fees.
- 5.1.2 The Governors are therefore committed to continuing to run a means-tested bursary scheme (the "**Bursary Scheme**") to allow direct access to the educational services and facilities provided by the Charity. The Bursary Scheme is regulated by the bursary policy (the "**Policy on Financial Assistance**") set out in school policy documents.

#### **5.2 Bursary Scheme**

- 5.2.1 The Charity will allocate a proportion of its total income in each financial year to fund the Bursary Scheme.
- 5.2.2 For the next two financial years (2010 to 2012) the amount allocated to fund the Bursary Scheme is to be in the region of 5% of the Charity's anticipated total income for that year.
- 5.2.3 Parents of children who meet the School's entry requirements and parents of existing pupils at the School will be able to apply for means-tested bursaries in accordance with the Policy on Financial Assistance. Such applications will be considered by the Charity and offers of bursaries shall be made to parents in accordance with the Policy.

#### **5.3 Access**

5.3.1 In order to ensure that the Bursary Scheme is accessible to prospective pupils whose parents cannot afford full fees, the Governors have identified the following methods for advertising the Scheme :

- a. Open Morning Brochures
- b. Prospectus
- c. Website

5.3.2 In addition, all parents are notified of the existence of the Policy of Financial Assistance on application for their child to sit the School's entrance exam and are requested to indicate whether they would like further information. Any parents wishing to discuss finances are referred to the Bursar and, if it become apparent that they may be eligible for a bursary, they are encouraged to apply.

## **6 Other opportunities to benefit**

### **6.1 Activities**

6.1.1 In addition to giving assistance with fees, the Charity has historically provided other opportunities for the public to benefit, including:

- DoE Activities
- JSLA Activities
- Student Teacher training
- CCF joint activities
- Support to local schools and sports groups
- Joint academic initiatives
- International Baccalaureate CAS Activities

6.1.2 The Governors have reviewed the activities the Charity currently carries on and carefully considered those which it could carry on in the future. The aim is to carry on those activities which are related to the Charity's Objects; which will provide the greatest opportunities for children other than pupils at the School to benefit from the Charity; and which would be taken into account by the Commission in assessing the Charity's public benefit.

6.1.3 The Governors have determined that this aim will best be achieved by carrying out the following activities in the next two years (2010 to 2012):

- DoE Activities

- JSLA Activities
- Student Teacher training
- CCF joint activities
- Support to local schools and sports groups
- Joint academic initiatives
- International Baccalaureate CAS Activities

6.1.4 For the next two financial years the amount allocated to fund these public benefit activities by College will be borne by the various department budgets.

6.1.5 In determining future activities which will be carried out to advance public benefit, the Governors will have regard to Appendix 2.

## **7 Funding public benefit activities**

7.1 The Governors have identified the sources of income available to the Charity to fund its public benefit activities. These are set out below.

### **7.2 Fee income**

7.2.1 The Charity may allocate part of its fee income in any financial year to the Public Benefit Budget.

7.2.2 The Governors will consider the extent to which fee increases should be allocated to the Public Benefit Budget, with due regard to the competitive market and price sensitivity of full-fee-paying parents.

### **7.3 Fundraising foundation**

7.3.1 The Charity has recently established a Foundation Office with the aim of, inter alia, encouraging donations from alumni, parents of current and former pupils, current and former members of staff and the general public.

7.3.2 Currently plans are in an embryonic stage as the Foundation Development Officer has only recently been appointed (Nov 2009) and is currently organising non fund-raising events as a means of 'Friendraising' and is researching avenues of development that suits the school and its stakeholders.

### **7.5 Existing bursary funds**

7.5.1 The School has a small amount of money in the Scholarship and Bursary Fund which is being built up and it is planned that interest from this fund should be used to provide funds for Bursaries in the future.

## **8 Charity Commission guidance**

- 8.1 The Governors acknowledge that they are legally required to take the Commission's guidance on public benefit into account in relation to all their decision making.
- 8.2 Public benefit shall be an Annual standing agenda item at a meeting of the Governors, and the minutes of the meeting shall record such considerations.
- 8.3 In particular, whenever proposals are considered which would involve significant investment or expenditure, e.g. in relation to a capital project, the Governors shall consider the whether the proposal is likely to have any impact on the Charity's ability to meet the public benefit requirement.

## **9 Recording, reporting and accounting**

- 9.1 The Governors recognise the importance not only of *providing* opportunities to benefit, but also of being able to *demonstrate* the public benefit the Charity provides. The Governors also recognise the need to prepare for the possibility that the Charity could be selected for a public benefit assessment by the Commission.
- 9.2 To this end, the Governors will ensure that:
  - 9.2.1 the minutes of each governing body meeting (and, where relevant, committee meeting) record in detail any considerations given to Public Benefit and any impact on the outcome of discussions caused by considering Public Benefit;
  - 9.2.2 a "public benefit register" is maintained, which records all of the ways on which the Charity provides public benefit (and other relevant information) including:
    - (a) the number and type of bursaries provided each year;
    - (b) any additional assistance to help parents meet the non-fee costs of their child's attendance at the School;
    - (c) the use of the School's facilities by children other than the School's pupils; and
    - (d) the methods used to advertise the Bursary Scheme and other opportunities to benefit.

Appendix 2 contains the form of the public benefit register.

- 9.3 The Governors will include the following in their annual report:
  - 9.3.1 a statement by the Governors confirming that due regard has been paid to the public benefit guidance published by the Charity's Commission; and

- 9.3.2 a report of those activities undertaken by the Charity to further its charitable purposes for the public benefit.
- 9.4 The Governors are also familiar with the Commission's example annual report for a fee-charging independent school and the statements made in that report which demonstrate that the principles of public benefit in the Commission's guidance have been met.
- 9.5 Appendix 3 contains a summary of the provisions the Governors will ensure are included in each annual report in order to demonstrate to the Commission that the Charity has complied with its obligations in respect of public benefit.
- 9.6 The Board of Governors as a whole is responsible for ensuring that the Charity complies with its obligations in relation to public benefit. The Board will nominate an individual to oversee the Charity's public benefit efforts and report to the Board on a regular basis. The Governor who currently holds this responsibility is Mr David Woodgate, the Vice-Chairman of the Board.

DJW Baylis OBE

Bursar and Clerk to the Governors

Written Jan 2010

Review Date September 2012

**Appendix 1 Activities which will/will not count in a public benefit assessment**

Activities that count	Activities that don't count
<p>Use of school facilities by community groups (generally free or at discounted rates) including:</p> <ul style="list-style-type: none"> <li>• Youth sports teams and clubs providing coaching and sports education</li> <li>• Scout and guides groups</li> <li>• Recreational music groups and teaching</li> <li>• Academic learning – advanced maths or second language classes</li> <li>• Swimming lessons</li> </ul>	<p>Use of facilities by the wider community:</p> <ul style="list-style-type: none"> <li>• Sports coaching for adults</li> <li>• Other charity events (e.g. British Legion fundraising events)</li> <li>• Work with local parish church council</li> <li>• Historical group tours of premises</li> <li>• Use of grounds for film projects</li> <li>• Use of swimming pool for sub aqua club</li> </ul>
<p>Collaborative work with maintained schools:</p> <ul style="list-style-type: none"> <li>• Sports fixtures with independent and state schools including local primaries</li> <li>• Sponsoring academies</li> <li>• Partnering trust schools</li> <li>• Hosting sports coaching</li> <li>• Providing facilities for young peoples' holiday clubs</li> <li>• Co-ordinating projects with local academies and state schools to promote specific subjects</li> <li>• Teacher secondments to overseas schools</li> <li>• Access for state school pupils to lectures and career advice</li> </ul>	<p>Employing local people and utilising local resources and suppliers, including:</p> <ul style="list-style-type: none"> <li>• Support for NQ teachers to reach qualified teachers status</li> <li>• Gap year student placements</li> </ul>
<p>Access to lessons and educational events:</p> <ul style="list-style-type: none"> <li>• Supporting work experience placements for state school pupils</li> </ul>	

<ul style="list-style-type: none"> <li>• Tutoring for Oxbridge admissions process</li> <li>• Training and mentoring PGCE students</li> <li>• Writing syllabus material for courses</li> <li>• Examiners and assessors for exam boards</li> <li>• Weekend talented and gifted lessons for local primary school children</li> </ul>	
<p>Sharing knowledge, skills and experience:</p> <ul style="list-style-type: none"> <li>• Teachers act as examination markers</li> <li>• Staff act as Trustees/Governors at community schools</li> <li>• Employees advising local councils on good practice models (e.g. Early Years Foundation Stage).</li> </ul>	<p>A school employee's membership of:</p> <ul style="list-style-type: none"> <li>• A local religious charity</li> <li>• A recorded newspaper for the blind</li> <li>• The Youth Offending Panel</li> </ul>
	<p>Sympathetic preservation and development of local environment and buildings (e.g. planting trees and preserving woodland)</p>

## Appendix 2

## Public benefit register

<b>Bursaries and Scholarships 2008-9</b>	
Total value (£) of Scholarships	
Total Value (£) of bursaries offered	
Total number of bursaries offered	
Value of bursaries as a proportion of gross income	
Breakdown of bursaries offered (by Year Group)	
Additional assistance with associated costs offered	
Methods used to advertise the Bursary Scheme and additional assistance with associated costs	
Comments on the effectiveness of advertising methods	

<b>Other public benefit activities</b>	
<b>Activity</b>	Describe public benefit provided including: <ul style="list-style-type: none"> <li>• Beneficiaries (who, number)</li> <li>• Cost to beneficiaries (if applicable)</li> <li>• How advertised and the effectiveness of such advertising (if relevant)</li> </ul>
[e.g. offering the school's sports hall for use by local state schools]	[e.g. the School's sports hall has been used by the following groups: [a] uses the hall on a weekly basis for [b] [x] uses the hall on a weekly basis for [y] No charge was made for the use of the sports hall by the above groups. The charity advertised the opportunity to use the sports hall by [ ]

## Appendix 3

## Governors' Annual Report

The following schedule sets out a summary of the statements which will be included in the Annual Report to demonstrate public benefit. The Governors will refer to the Commission's example report for further details.

Section of Report	Statement	Legal requirement/principle demonstrated
Objects/ Objectives/ Aims	Statement by the Governors that in setting the objectives and planning the activities of the School, due regard has been paid to the Commission's general guidance on public benefit and in particular its supplementary public benefit guidance on advancing education and fee-charging.	Legal requirement
	Statement as to what the objects of the Charity are.	
	Statement as to who the Charity's beneficiaries are.	
Ethos/ Strategy/ Policy	Statement that School welcomes pupils from all backgrounds.	
	Explanation of the admission criteria and admissions policy.	
	Explanation of the access policy including bursary policy and other fee assistance provided.	
Review of activities and achievements	Report of those activities undertaken by the Charity to further its charitable purposes for the public benefit. In particular, this report should address: <ul style="list-style-type: none"> <li>The educational activities of the Charity, focusing on those which have made a significant contribution to the Charity's objects and provide public benefit;</li> <li>Academic, sporting and co-curricular activities (e.g. music and drama);</li> <li>Details of bursaries and scholarship awards;</li> <li>Details of other "public benefit" activities; and</li> <li>Details of any community service undertaken by pupils.</li> </ul>	Legal requirement
	Explanation of how bursary policy worked in practice.	
	Value of means tested bursaries and cost of other public benefit activities	Value of opportunities provided
Structure, Governance and Management	Statement confirming that the Governors received no private benefit from the Charity and in particular that no Governor or person connected with a Governor received any benefits from means tested bursaries or scholarships awarded to pupils.	Any private benefit is incidental.