



HALSTEAD ST ANDREW'S
SCHOOL

SCHOLARSHIP AND BURSARY POLICY

Compiled by: A Law / M Eaton	Policy version date: February 2024
Approved by: Bursary Committee	Next Revision date: February 2025

Scholarships at 7+ and 11+

Evidence suggests that a key area to address in many private schools is the quantity of means tested bursaries provided as a proportion of all subsidised education offered by the school.

Our current level of awarding of scholarships will not enable us to move towards a higher percentage of means tested support and therefore needs to be restricted. The School will of course continue to award scholarships to outstanding candidates in the categories described but there will be a set limit of one whole school fee per year group as a maximum. It is important to emphasise that in a year of few candidates, no scholarships may be awarded.

The awarding of internal scholarships will be based on evidence acquired through continuous assessment data and reports on attitude to study from the children's teachers. This means of assessment is inherently fairer and more accurate than relying upon the results of a one-off exam. After consultation with Heads of Department all children will be considered and scholarships may then be offered to suitable deserving candidates. The awarding of external scholarships will be based on scholarship assessments administered by the school. All scholarship awards are discretionary and will be given after suitable assessment and recommendations from relevant senior staff. Ultimately the Head, in consultation with the Bursar, will have the final decision. Key to the decision making process will be the consideration of an individual's potential to achieve a similar award at the majority of senior schools. It is a normal condition of the acceptance of an award that the pupil will stay at Halstead St Andrew's until the end of the year immediately prior to the time when he/she will move on to a senior school. An award is tenable throughout the child's time at the school. Music scholars are expected to learn two instruments.

Performance will be assessed at least annually. With regard to effort in the subject area and general behaviour, including setting a good example to other pupils, parents/guardians will be obliged to support and encourage the pupil and encourage them to achieve the purposes of the award. Should there be any concerns with respect to performance, parents/guardians will be asked to a meeting, resulting in clear targets being set and which shall be subject to a review within an agreed period of time. If these targets are not met, the School shall be entitled to notify the parents/guardians that there is a potential risk of the award being withdrawn. Where a decision is taken to withdraw the award, one term's notice of the withdrawal of an award will be required to be given.

Means Tested Bursaries

General

The Governors of Halstead St Andrew's School are committed to broadening access to the School by offering to eligible parents/guardians means-tested financial support with the payment of school fees. Such support is known as a Bursary and these may be awarded in the form of a discount of up to 100% of the tuition fees payable, depending on the financial, compassionate or other pertinent circumstances of applicants. These are normally available to pupils in Year 3 (exceptions may be made for younger children) and above who meet the suitability criteria below.

Bursary awards are subject to repeat testing of parental means each year and may be varied, upwards or downwards, depending on parental circumstances. Awards are subject to an independent assessment of the parent's /guardian's circumstances for awards of 25% and above. The assessment is carried out by Bursary Administration Ltd and takes into account their savings, investments and realisable assets, as well as their income, the size of their

family, any other persons dependent upon them (and like factors) and compassionate or other pertinent considerations. The assessment will include a home visit or online consultation.

Requests for financial support usually fall into two categories:

- New applicants to the School, where a place has been offered but parents/guardians are unable to fund the tuition fees.
- Existing pupils where a change in parents/guardians' circumstances has resulted in difficulty in meeting tuition fees and may result in the child being withdrawn part way through a stage of education.

New Applicants to the School

Awareness. Information provided by the School, and alerting the parents/guardians of potential pupils to the possibility of gaining means-tested financial support with the payment of school fees is included in:

- The School prospectus
- The School website.
- The local press by means of advertisements.

The Application Process.

Bursaries may be made available to parents/guardians of children at Halstead St Andrew's School (see the School's Admission's Policy). They are awarded at the discretion of the Governors (acting primarily through the Bursary Committee) and the Head and School Bursar are responsible for the management and coordination of the process.

- Step One. Parents/guardians seeking a Bursary are required to complete an application form which seeks to establish the financial circumstances of the household. The form, which requests details of income and capital, will be provided on request and must be accompanied by full documentary evidence. The completed forms and report from Bursary Administration Ltd (for awards of 25% and above), together with the necessary documentary evidence, are to be submitted to the Bursar no later than the end of March in any year for Bursaries to start the following September.
- Step Two. The Bursar and Head prepare a recommendation in accordance with the Halstead St Andrew's School Scale of Awards which is considered, and adjudicated upon, by the Bursary Committee.
- Step Three. The parents/guardians are advised whether a Bursary is available with respect to their child's place at the School and the amount of the Bursary offer.
- Step Four. Parents/guardians are then required to sign a letter accepting the place at the School and an acknowledgement agreeing to any conditions relating to the Bursary.

The Case for Assistance.

The Head, Bursar and the Bursary Committee will consider a number of factors when making the judgement as to the justification for support, and the extent of such support. In the main, the child's suitability for the School is the first consideration in granting support.

● Suitability. In assessing a child's suitability, attention will be given to the academic assessment result of each applicant, but potential as well as actual achievement will also be considered. Bursary funds are limited and those judged most suitable will be given priority, as those likely to gain most from the educational provision. Each pupil to whom support is offered must, in the opinion of the Head, be likely to make sound academic progress following admission and possess the potential to develop the quality of his or her work, and benefit from participation in the wider, extra-curricular activities on offer at the School. In normal circumstances, each applicant should meet the School's normal academic requirements. Previous school reports will be reviewed for evidence of good behaviour.

● Financial Limitations. The amount of the Bursary award is not influenced by the level of the academic ability of the child but by the extent of need. Each case is assessed on its own merits and awards are made accordingly, subject to the School's ability to fund these, having regard to the available Budget. It is recognised that judgements about what sacrifices a family should make to pay school fees will be personal. However, the School has a duty to ensure that all Bursary grants are well focussed and so, as well as current earnings, other factors will be considered in determining the necessary level of grant. These will include:

● The ability to improve the financial position or earning power of the family. For example, where there are two partners, both would be expected to be employed unless one is prevented from doing so through incapacity, the need to care for children under school age or other dependents, or the requirements of their partner's work.

● Opportunities to release any capital. Significant capital savings and investments would be expected to be used for the payment of school fees, as would equity values in houses.

● In cases of separation, the contribution made by the absent parent.

● Contribution to household costs by other, wider, family members, any adults unrelated to the child or by outside sources.

● Where fees are being paid to other schools (or universities), the School's grant will take into account all these outgoings.

● Whilst not exhaustive, the School considers that the following would not be consistent with the receipt of a Bursary:

- Frequent or expensive holidays.
- New or luxury cars.
- Investment in significant home improvements.
- A second property/land holdings.

Other Factors. It is recognised that, in addition to academic ability and financial constraints, there may be other circumstances which should be considered. These include:

- Where a child has siblings at the School.
- Where the social needs of the child are relevant (eg: may be suffering from bullying at their present school).

- Where a parent/guardian is terminally ill or is unable to secure permanent employment due to poor health.
- Where a separation has resulted in the child having to be withdrawn from the School, thereby adding to the stress of coping with the parents/guardians separating.

Existing Pupils - Change in Family Circumstances

Parents/guardians with a child at the School whose financial circumstances suddenly change may apply for a Bursary to the Head, explaining their situation and using the required application forms, and which will be provided by the School on request. Such awards are subject to the availability of funding and cannot be guaranteed, and will follow the same application process set out above.

Annual Review

All Bursary awards are subject to repeat testing of parental means each year and may be varied upwards or downwards depending on those parental circumstances. Current Bursary holders will be issued with repeat means-testing forms at the beginning of April each year for return by the end of the month.

For those previously in receipt of Bursaries, the Head and Bursar, in making their joint recommendation to the Governors, have the discretion to recommend to the Governors the reduction or withdrawal of an award, not only where a pupil's progress, attitude or behaviour has been unsatisfactory but also where the parents/guardians have failed to support the School, for example by the late payment of any contribution they are making to the fees.

Budget

The aggregate amount of Bursary awards that can be made and be outstanding at any time will be subject to an overall cap set by the Governors from time to time, which is currently 5% of annual fee income. This may be varied upon agreement with the full Board of Governors.

Confidentiality

The School respects the confidentiality of Bursary awards made to families and recipients are expected to do likewise.

Other Sources of Bursary Assistance

In addition to the school's Bursary Fund, there are a number of educational and charitable trusts which provide assistance with tuition fees. In the majority of cases, these are to assist children who are already attending a fee-paying school and due to a change of circumstances may be unable to remain. Halstead St Andrew's encourages parents/guardians to apply for support from other sources, where it is felt a good case can be made for assistance. Further information on how to pursue such assistance may be obtained from:

The Bursar; Email: bursar@hsaschool.co.uk

The Educational Trusts Forum website: www.educational-grants.org

Royal National Children's Springboard Foundation website: www.royalspringboard.org.uk

Scholarship, exhibition or bursary: conditions of award

1 **Grant of the award:** An Award is granted at the sole discretion of the Halstead St Andrew's School (the **School**).

2 **Obligations of the pupil:** The pupil who is the subject of an Award is required to work hard, to contribute positively to the life of the School, to be a credit to the School and to set a good example to other pupils. The pupil must adhere to the School's required standards of conduct and progress. These are the **Purposes of the Award**.

3 **Obligations of the parent(s):** The parents are required to:

3.1 support and encourage the pupil to achieve the Purposes of the Award; and

3.2 treat members of the School community reasonably and to uphold the aims and the good name of the School; and

3.3 comply with the School's *Terms and Conditions*.

4 **Means tested awards:** All means tested awards will be subject to annual review and the parents shall each year be required to complete a financial means questionnaire. After any annual review, the School reserves the right to vary the value of the award with immediate effect and will confirm the new value in writing to the parents.

5 **Continuation of the award:** Continuation of the award is dependent upon the following conditions being fulfilled:

5.1 in the case of a means tested award, the parents satisfy the School's financial requirements each year; and / or

5.2 in respect of all awards:

5.2.1 the financial resources allocated by the School to support the award being sufficient to maintain the award; and

5.2.2 it being in the financial interests of the School to maintain the award.

6 **Confidentiality:** The value and terms and conditions of the award shall remain confidential between the parents and the pupil and the School.

7 **Termination of the award:** The award may be terminated on the following grounds:

7.1 **termination on financial grounds:** the School may terminate the award on one term's notice in writing if, in the opinion of the School Governors acting in good faith:

7.1.1 the parents have not satisfied the School's financial requirements under clause 4 and clause 5; or

7.1.2 the School is no longer able to continue the award under clause 5.

The termination shall take effect from the date set out in the written notice;

7.2 **termination on the grounds of conduct:** the School may terminate the award by written notice sent to the parents with immediate effect if, in the opinion of the School Governors acting in good faith, one or more of the following conditions has been fulfilled:

7.2.1 the pupil has not complied with the obligations set out in clause 2 and in the further opinion of the Governors there has been no significant improvement following consultation with the parents and / or the pupil and the issue of a written warning; or

7.2.2 the parents have not complied with the obligations set out in clause 3; or

7.2.3 the parents of the pupil do not keep the value and terms and conditions of the award confidential in accordance with clause 6; or

7.2.4 the parents withdraw the pupil from the School without providing a full term's written notice;

7.3 **repayment of the award:** the parents will be required to repay all or part of the benefits received under the award if it is terminated in any of the following circumstances:

7.3.1 under clause 4 if the parents have knowingly or recklessly provided false or inaccurate information about their financial position, all benefits received from the date on which the false or inaccurate information was supplied may be repayable; or

7.3.2 under clause 2 if the pupil has been found to have committed a serious breach or series of persistent minor breaches of discipline for which the sanction would normally be expulsion or required removal, up to three terms' benefits (if received) may be repayable.

8 **Fees in lieu of notice:** For the avoidance of doubt, the benefit receivable under an award will not apply to any term for which the School requires payment of fees in lieu of notice.

9 **Conditions of award:** These conditions of award take precedence over any of the School's *Terms and Conditions* which are inconsistent with them but in all other respects the School's *Terms and Conditions* as amended from time to time shall apply and these conditions of award shall be interpreted in accordance with them.

Note: These conditions must be shown on the reverse side of every letter offering a Scholarship, Exhibition or Bursary