



## **THE HALL SCHOOL**

### **Bursaries Policy and Procedure**

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**Policy ratified by:** SLT

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**Governor responsible for policy:** Robert Palmer

This policy is available on the School website and can be made available in large print or other accessible format if required.



## **Bursaries Policy 2018**

### **1.0 General**

The governors of The Hall are committed to broadening access to the school by offering to eligible parents/guardians means-tested financial support with the payment of schools fees. Such support is known as a bursary and bursaries may be awarded in the form of a discount of up to 100 per cent on tuition fees payable, depending on the financial, compassionate or other pertinent circumstances of applicants.

### **2.0 Bursary Funds**

The governors of The Hall are committed to supporting ten students at any one point in time through the award of bursary funding. The normal entry point for a bursary candidate will be at Year 4 although entry at Year 5 may also be possible.

During an Assessment Day, the applicants are required to sit several tests, in order to gauge their academic potential. These include (but are not limited to) General Maths, Reading, a creative writing task, and Mental Arithmetic. An indication of the boy's Developed Ability will also be sought. It is also important that during the Assessment Day teachers have opportunities to gauge and report upon the applicants' social and emotional competencies in order that the Headmaster can be satisfied that any bursary award holders are able to cope with the pace and depth of the curriculum offered at The Hall.

Once a candidate's academic potential has been ascertained, bursary awards are subject to repeat testing of parental means each year and may be varied upwards or downwards, depending on family circumstances. Awards are made on the basis of The Hall's confidential scale of awards which sets out award levels in relation to a family's financial circumstances. The scale of awards is reviewed and revised annually by the Finance Director to reflect any changes in fee costs and is approved by the governors. Though awards are generally tied to this scale, they may be varied upwards or downwards depending on individual parents'/guardians' circumstances (e.g. 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), compassionate or other pertinent considerations.

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

### 3.0 Methodology

#### *New Applicants to the School*

Information is provided by the school through a variety of channels in order to raise the awareness of parents/guardians of potential pupils to the possibility of gaining means-tested financial support with the payment of schools fees:

- The school's Bursaries brochure, that includes an application form for financial assistance and a schedule of the steps in the application process
- The school website
- Advertisements placed in the local press or other public space, selected to attract the target demographic

#### *3.1 The Application Process*

Bursaries may be made available to parents/guardians of children entering Year 4 at The Hall. They are awarded at the discretion of the governors and the Headmaster. The Head of Data and Reporting and the Registrar are responsible for the co-ordination of the Assessment Day and recording of assessment results. The Head of External Relations and the Finance Director are responsible for the management and coordination of the means-testing process.

- Step one - applicants and their parents are invited to visit to the school to meet with the Headmaster
- Step two - 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, may be found at Annex B and must be accompanied by full documentary evidence. The completed forms, together with the necessary documentary evidence, are to be submitted to the Finance Director no later than the **date of the entrance exam** in any year for bursaries to start the following September
- Step three - the Finance Director assesses all applications in order to establish the likely level of support which will be required in order to allow the child to attend the school. This may involve the Finance Director, or their representative, visiting the parents'/guardians' home to ensure the information has been correctly interpreted and the basis of the financial assessment has been fair
- Step four - the Finance Director prepares a recommendation in accordance with The Hall's confidential scale of awards which is considered with the Headmaster and a joint recommendation is then reached
- Step five - the joint recommendation is presented to the Finance Committee of the school governors for approval
- Step six - **end of February**. The parents/guardians are advised whether their child is to be offered a place at the school and the extent of the bursary offer
- Step seven - parents/guardians are then required to sign a contract accepting the place at the school that includes a copy of the Conditions of Award. This constitutes an acknowledgement of their agreement to any conditions relating to the bursary.

### *3.2 The Case for Assistance*

The Headmaster and Finance Director 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 boy's suitability for the school is the first consideration in granting support.

- **Suitability** - in assessing a boy's suitability, attention will be given to the academic assessment result of each applicant but potential will also be considered as well as actual achievement. 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 Headmaster 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 consulted for evidence of good behaviour.
  
- **Financial limitations** - the amount of the bursary award is not influenced only 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 within the context of what is viable within the context of its overall 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 focused and so, as well as current earnings, other factors which will be considered in determining the necessary level of grant 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
  - Acknowledging that others might have a different view, 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 (e.g: 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 adding to the stress of coping with the parents/guardians separating
  
- **Payment of fees by parents awarded partial bursaries**

If a family has been awarded a partial bursary, the parents will be responsible for paying for the amount of fees due after taking account of that award.

An award may be withdrawn in accordance with (or by reference to) the terms upon which such award is made and/or if, in the opinion of the Head, the child's attendance, progress and/or behaviour no longer merit the continuation of the award.

Any such withdrawal of an award will not operate so as to increase the fees due in respect of a term which has already commenced. Where it appears likely to the Head that an award may be withdrawn from the family, the parents will be notified in advance. If within fourteen (14) days following the withdrawal of a bursary the child is withdrawn from the School, no fees in lieu of notice will be payable by the family. This will give the parents enough time to decide whether they want to continue to educate the child at the School.

### *3.3 Existing Pupils - Change in Family Circumstances*

Within overall budget funding, the school will in normal circumstances set aside each year a hardship fund, for cases of sudden, unforeseen need or where applications meriting bursary assistance are received out of the normal calendar cycle for bursary submission, scrutiny and award. This sum will be set within budgetary constraints. Parents/guardians with a child at the school whose financial circumstances suddenly change may apply for a bursary to the Finance Director, explaining their situation and using the forms at Annex B. Such awards are subject to the availability of funding and cannot be guaranteed.

### *3.4 Annual Review*

All bursary awards are subject to repeat testing of parental means each year and may be varied upwards or downwards depending on parental circumstances. Current bursary holders will be issued with repeat means-testing forms at the beginning of January each year for return by the end of the month. For those previously in receipt of bursaries, the Headmaster and Finance Director, in making their joint recommendation to the Finance Committee, 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.

#### **4.0 Confidentiality**

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

#### **5.0 Educational extras included within a bursary award**

- Uniform costs over the course of a boy's time at The Hall (excluding footwear)
- A laptop when the boy reaches Year 6
- The tuition and hire costs of learning one musical instrument (as long as sufficient interest and progress is shown)
- A discretionary award to go towards the costs of an extra-curricular residential trip while the boy is in the Senior School (eg. the Year 7 Iceland trip)



## The Hall Bursary: Conditions of Award

- 1 *Grant of the Award:* An Award is granted at the sole discretion of 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 Hall, to be a credit to the school and to set a good example to other pupils. The pupil must adhere to The Hall's required standards of conduct and progress. These are the Purposes of the Award.
- 3 *Obligations of the parent(s)/ guardians:* The parents / guardians are required to:
  - 3.1 support and encourage the pupil to achieve the Purposes of the Award; and
  - 3.2 support and uphold the aims, values, ethos and good name of The Hall; and
  - 3.3 comply with The Hall's *Terms and Conditions*.
- 4 *Means tested awards:* All means tested awards will be subject to annual review and the parents / guardians 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 Hall's financial requirements each year; and / or
  - 5.2 In respect of all awards:
    - 5.2.1 The financial resources allocated by The Hall to support the award being sufficient to maintain the award; and
    - 5.2.2 It being in the financial interests of The Hall 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 Hall.
- 7 *Termination of the award:* The award may be terminated on the following grounds:
  - 7.1 Termination on financial grounds:** The Hall may terminate the award on one term's notice in writing if, in the opinion of The Hall's Governors acting in good faith:
    - 7.1.1 The parents have not satisfied The Hall's financial requirements under clause 4 and clause 5.1; or

7.1.2 The Hall is no longer able to continue the award under clause 5.2.

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

**7.2 Termination on the grounds of conduct:** The Hall may terminate the award by written notice sent to the parents with immediate effect if, in the opinion of The Hall's 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 Hall 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 7.1.1 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 7.1.2 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 Hall requires payment of fees in lieu of notice.
- 9 *Conditions of award:* These conditions of award take precedence over any of The Hall's *Terms and Conditions* which are inconsistent with them but in all other respects The Hall's *Terms and Conditions* as amended from time to time shall apply and these conditions of award shall be interpreted in accordance with them

## 10 *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. [Insert school name] encourages parents/guardians to apply for support 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 Finance Director, The Hall Etc Email: [[bursar@ballschool.co.uk](mailto:bursar@ballschool.co.uk)]

The Educational Trusts Forum; Website: [www.educational-grants.org](http://www.educational-grants.org)

The Royal National Children's Foundation; Website: [www.rncf.org.uk](http://www.rncf.org.uk)

#### **Annex A. Means testing guidance and Scales of Award**

#### **ANNEX A Means Testing Guidance and Scales of Award**

A Hall bursary is an amount of financial support given to a family of modest means whose son has a track record of academic achievement in their current school and whose potential, we assess, would be further nourished at The Hall. Families may be able to receive up to 100% remission of the school's normal fees. The extent of the bursary will be dependent on the family's level of

household income and assets, which are ‘means-tested’ as part of the application process for a bursary. Our Director of Finance assesses the eligibility based on the information you supply in a **Confidential Financial Information** form (attached). Please would you complete this as soon and as fully as possible. There are some notes on its completion at the back of the document. In general, I would suggest providing as much backing evidence (such as tax returns and statements) as possible.

We have a sliding scale of joint incomes that forms the basis of the assessment but the final award of a bursary is at the discretion of the Headmaster and certain Governors. The Governors give priority to those families whose son would not, without monetary help, have the means to attend an independent school.

AWARD SCALES FOR 2019-2020					
Household Income	Award from the School per year	Payable by Parents per year	Equivalent per term	Full/partial bursary per year	
Up to £45,000	£19,365	£0	£0		100.00%
£55,000	£16,460	£2,905	£968		85.00%
£65,000	£12,345	£7,020	£2,340		63.75%
£75,000	£8,230	£11,135	<b>£3,711</b>		42.50%
£85,000	£4,115	£15,520	£5,173		21.25%
£95,000	£0	£19,365	£6,455		0.00%

ANNEX B

**Confidential Statement of Financial Circumstances and Notes for Guidance for Completion**