



SCHOLARSHIPS, BURSARIES AND DISCOUNTS POLICY

INTRODUCTION

1. This policy is a 'Whole School Policy' and informs practice in the Senior School, Prep School and Nursery. The School is a fee paying independent School with a family ethos. It is the School's intent to support as wide and diverse a group of pupils as possible where preference is not given based on faith, ethnicity or gender. Battle Abbey School seeks to offer pupils the opportunity for excellence throughout their time in the School.
2. Governors recognise that talented and gifted pupils should be encouraged to fully develop their skills and crafts and in order to support these pupils, the School has a number of scholarships available. The School recognises that the costs of education and the circumstances of families may change during the years that a pupil will be at Battle Abbey. The School also recognizes that for some parents the opportunity to join Battle Abbey for part or all of a child's development is not possible. In order to support the development of new or existing pupils the School will offer bursary support where appropriate and possible. Support is also offered to staff, siblings of pupils in the School and military families by means of discounts on tuition fees payable. This policy sets out the terms and conditions of the financial support available in each of these categories.

TERMINOLOGY

3. **Scholarship**. Scholarships are awarded on merit based on the pupil taking scholarship exams set by the School or as a result of School staff reviewing externally assessed materials. Scholarships are available for a variety of subjects and have variable terms which are defined for each scholarship at application time. Scholarship awards are determined by the Head in consultation with the subject specific academic staff. Further information on scholarships is at Appendix 1.
4. **Bursary**. Bursaries are awarded based on means testing. Bursary applications may be made at any time to the Bursar. The amount of bursary awarded will be tailored to individual needs. Further information on bursaries is at Appendix 2.
5. **Discounts**. Discounts are offered to all staff of Battle Abbey School while they are employed by the School. The School also offers discounts to siblings and military families. Further information on discounts is at Appendix 3.

POLICY REVIEW AND AVAILABILITY

6. This policy will be reviewed every 3 years by the Finance and General Purposes Committee (F&GPC) and approved by the Full Court of Governors. It will be published on the School website for staff, parents and other interested parties.

KEY PERFORMANCE INDICATORS

7. The fund available for scholarships, bursaries and discounts is agreed annually by governors as part of the annual budgeting process. Governors have set key performance indicators to measure the amount of financial support provided and ensure that it is within sensible limits to ensure the long term viability of the School. Governors take account of several factors when determining the funds available and these

include ongoing financial commitments, the School's strategic objectives, pupil numbers and achievement in GCSE and A Level exams. The Bursar maintains a schedule of financial support granted to pupils and this is reviewed by independent auditors annually.

CONFIDENTIALITY

8. The size and scope of awards are made in confidence between the Head, Bursar and parents or guardians of a pupil. In the event of disclosure to a third party of the terms of an award, the School reserves the right to withdraw the award.

PUPIL AND PARENT OBLIGATIONS

9. A pupil who is in receipt of financial support (ie scholarship, bursary or discount) 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 parents are expected to support and encourage the pupil and to uphold the aims and reputation of the School. The parents are also required to pay the balance of the fees due by the Friday before each term starts unless they pay by direct debit. Parents are also required to sign a 'Conditions of Award' certificate when financial support is approved.

WITHDRAWAL OF FINANCIAL SUPPORT

10. Financial support may be withdrawn by written notice sent to a parent if, in the opinion of the Head, the pupil or parent has not complied with the obligations set out above. Withdrawal of financial support will take effect from the start of the following term.

REPAYMENT OF FINANCIAL SUPPORT

11. Parents will be required to repay up to 3 terms of financial support if the pupil has engaged in serious misconduct or been expelled, or is withdrawn without a term's written notice having been given.

Appendices:

1. Scholarships.
2. Bursaries.
3. Discounts.

This policy was approved by the Full Court on 15 Jun 18

SCHOLARSHIPS

1. Scholarships consisting of a percentage of the tuition fee (up to a maximum of 20%) may be awarded to a pupil in Key Stage 2 or above who has demonstrated one of the following:
 - Academic prowess in the scholarship exams (in Maths, Science and English)
 - Academic prowess in other recognised examinations
 - Exceptional ability in sport, art, performing arts, music, ICT and computing.
 - On transition from the Prep School, all round ability and contribution to the School
 - On transition from Year 11 to Year 12, all round ability and contribution to the School
 - For the 6th Form only, exceptional ability in performing arts (Joanna Lumley scholarship)
 - For the 6th form only, academic prowess in History (Maltby scholarship)
2. Scholarships are awarded on entry to Battle Abbey School although current pupils may exceptionally apply for a scholarship when they transfer from one key stage to another. Scholarship exams for entry into Year 7 and Year 9 and are held at the start of the Spring Term.
3. A pupil may be awarded 2 scholarships, but the total payable for both awards will be a maximum of 20% of the tuition fees payable.
4. Music scholars and Performing Arts scholars may also be entitled to free music and / or singing lessons in addition to their scholarship award. The maximum payable will be the equivalent of 1.5 hours of tuition for 10 weeks each term.
5. Scholarships are awarded on condition that the pupil completes his or her education to the end of Year 6 for Prep School scholarships, or Year 11 at the Senior School. In the event that the pupil is removed in other than circumstances such as a job move or family disruption, the benefits of the scholarship, from its inception, will be recoverable from the parents.
6. Pupils in receipt of a scholarship awarded for a particular subject (eg Music) are expected to study the subject at GCSE and A Level and to participate fully in any extra-curricular activity associated with the subject. The parents of a pupil who does not wish to study their scholarship subject at GCSE or A level will be required to state the reasons in writing to the Head and only in exceptional circumstances will the scholarship continue to be awarded.
7. The progress of pupils in receipt of a scholarship will be reviewed annually and if their performance is deemed to be unsatisfactory, the scholarship will be reviewed.
8. **Scholarships for Year 12**. The Full Court has exceptionally agreed a relaxation of the 20% limit for pupils entering Year 12 to raise the academic attainment at 6th Form and attract pupils from state Schools who would not otherwise be able to afford to study at the School. This relaxation will be reviewed annually to determine if continuation is appropriate.
9. Pupils in receipt of a scholarship may also be eligible for a bursary and / or a discount.

BURSARIES

1. The governors of Battle Abbey School are committed to broadening access to the School by offering to eligible parents or 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 reduction on tuition fees payable, depending on the financial, compassionate or other pertinent circumstances of applicants. Bursary awards are subject to repeat testing of parental means each year and may be varied upwards or downwards, depending on parental circumstances and funding available. Requests for financial support usually fall into two categories:

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

Application process for new applicants to the School

2. Bursaries may be made available to parents or guardians of children entering Year 1 to Year 13 although only in exceptional circumstances would a bursary be awarded to a pupil on entry into the Prep School. They are awarded at the discretion of the governors and the Head and Bursar are responsible for the management and coordination of the process outlined below:

- Parents or guardians seeking a bursary are required to complete a Bursary Application Form which seeks to establish the financial circumstances of the household. The form, which requests details of income and capital, may be obtained from the Registrar or Bursar.
- The Bursar 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 visiting the parents' or guardians' home to ensure the information has been correctly interpreted and the basis of the financial assessment has been fair.
- The Bursar prepares a recommendation which is considered with the Head and a decision on the amount of bursary to award, if any, is made. This decision will take account of any financial limits set by the Finance and General Purposes Committee as part of the annual budget process.
- The parents or guardians are advised of the bursary decision.

3. The Head and Bursar 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. Attention will be given to the academic achievement of each applicant and 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 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 consulted for evidence of good behaviour.

Existing pupils - change in family circumstances

4. Within overall budget constraints, 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 (ie on entry to the School). Parents or guardians with a child at the School whose financial circumstances suddenly change may apply for a bursary to the Bursar explaining their situation and using the Bursary Application Form. Any award made will be subject to the availability of funding and cannot be guaranteed.

Financial considerations

5. 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 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. Capital savings and investments would be expected to be used for the payment of School fees as would equity values in property.
- 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 bursary 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

6. 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 adding to the stress of coping with the parents or guardians separating.

Other comments

7. Pupils in receipt of a bursary may also be eligible for a scholarship and / or a discount.
8. Bursaries awarded to prep School pupils are only payable whilst the child is a pupil at the Prep School.

Annual review

9. All bursary awards are subject to repeat testing of parental means each year and may be varied upwards or downwards depending on their circumstances. Parents are expected to disclose any changes in their financial circumstances as part of the review. Current bursary holders will be issued with a Bursary Update Form at the beginning of the Summer Term for completion and return by half term. The Head and Bursar will review the updates and decide whether to vary the amount of support, or withdraw it completely, not only where a pupil's progress, attitude or behaviour has been unsatisfactory but also where the parents or guardians have failed to support the School (eg by the late payment of contributions they make to the fees).

Other sources of financial assistance

10. 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. Battle Abbey School encourages parents or 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 Bursar or organisations such as:

- The Educational Trusts Forum - www.educational-grants.org
- The Royal National Children's Foundation – www.rncf.org.uk

DISCOUNTS

1. The Full Court recognises that staff are not only employed by the School but contribute to its life in other ways outside of their employment duties and in order to support our staff, we offer discounts to our staff members. Governors also recognise the value in siblings being in the same School. Sibling discounts are provided for the third and subsequent children in each family unit. Finally, the School is proud of our associations with military families and offers discounts for military families where a parent or guardian is a serving member of the Armed Forces. The School does not offer discounts on any other basis.
2. Discounts payable are as follows:
 - a. A staff discount of up to 50% of the tuition fees may be payable to staff. The discount is pro-rated for part time staff and will cease upon termination of employment. A further discount of up to 10% may be eligible if both parents are employed by the School.
 - b. A sibling discount of 12% of tuition fees will be awarded to the 3rd child and any subsequent child in any family who is at the School in the same term as the other two.
 - c. Children of serving RN, Army and RAF personnel will be entitled to a 12% discount.
3. Pupils in receipt of a discount may also be eligible for a scholarship and / or bursary.