

### Scholarships and Assisted Places (Bursaries) Policy

Aim: To attempt to ensure the equitable distribution of the School's Scholarship and Bursarial funds.

Policy File Name	Schedule Number	Inspection Reference
Scholarships and Assisted Places (Bursaries)	WS.057	

#### Version History

Number	Date	Description	Author
1.0	Jul 2021	Update	Richard Trickey

#### Scope

Name	Applicability	Lead	Date of Last Review	Frequency of Review
Whole School	✓	COO	July 2021	Annual
Prep School				
Senior School				
Taunton School International (TSI)				

#### Policy for Approval by:

Governors	✓	SPC		Senior SMT		Prep SMT		TSI SMT	Other	
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#### Approval and Authorisation

Name	Date
Nicola Miller	

#### Distribution List

To:	Finance Committee
	Finance Director
	Admissions

#### Distribution Means

Email		Intranet	✓	Internet (web)	
Governors (Citrix Access)	✓	Inspectors (Citrix Access)		Notices	
Staff handbook		Hardcopy			



## **SCHOLARSHIPS and ASSISTED PLACES POLICY**

### **Scholarships**

A scholarship is an award for excellence in academic study, the arts, sport or all-round talent. For many of our scholars, this award serves primarily as an acknowledgement of their achievements and they receive a financial award, up to a value of 40% of the School fees (50% in exceptional cases). For others, a scholarship can also be a route to securing more significant financial support via a means-tested assisted place.

Scholars play a crucial role in practising, demonstrating and promoting the values which are central to our school. They are challenged by our outstanding teachers and by other exceptional pupils and we expect them to emerge as young men and women who exceed our expectations. They should be an inspiration to our community and play a leading part in the school.

### ***Taunton Prep***

We offer Academic, Sport, Art, DT and Performing Arts scholarships to new and existing pupils for entry into Year 7 and subject to suitable progress and behaviour, these may, subject to regular performance review, continue through to the end of the 6<sup>th</sup> Form. It is possible for pupils who have a broad all-round ability to enter into a combination of the categories above in order to achieve an All-Rounder Scholarship.

Scholarships may be honorary or carry a fee remission of up to 40%. If a scholarship has been awarded, parents in genuine financial need can also apply for a means-tested assisted place.

The Headmaster may also offer a small number of Headmaster's Awards of up to 50% in cases of exceptional ability in a specific area.

### ***Taunton School***

We offer Academic, Sport, Art, Music, Design Technology and ICT scholarships to candidates for entry into Year 9 and Year 12 for new pupils and existing pupils. In addition, we recognise all-round ability and welcome applications from candidates who demonstrate high ability in Art, Drama, Music or Sport combined with strong academic ability.

The Headmaster may also offer a small number of Headmaster's Awards of up to 50% in all year groups in cases of exceptional ability.

### ***Assisted Places***

We believe that a first class education should be available to all, regardless of financial circumstance, economic or social background. As such we are committed to broadening access to the school by offering a limited number of assisted places to eligible families. The Assisted Places programme is designed to support Taunton School's inclusive ethos and to maintain a broad mix of children from different economic and social backgrounds. Assisted places are awarded on the basis of financial need rather than ability and this differentiates them from the Scholarships.

The Assisted Places programme (sometimes known as the bursary programme), offers means-tested financial support, in exceptional cases of up to 100% of tuition fees, to pupils who demonstrate commitment, aptitude and a desire to learn yet whose families may not be able to afford full fees. The

level of financial support awarded is decided on the basis of a confidential, means-tested assessment so varies according to each family's individual circumstances. Assistance is offered on a sliding scale which means that recipients range from middle income families in professional careers to those of very modest means. Fully funded places are extremely rare and will usually be made to exceptional candidates if specific funds have been raised by the Taunton School Foundation for that purpose, for example the Evans-Lombe IB award. The application process for Assisted Places is standardised and will be means-tested.

The Assisted Places programme is generously subsidised by the School's Foundation and supported by our community of donors, including former pupils, parents and friends.

Once an Assisted Place has been awarded it will be subject to repeat testing of parental means periodically, sometimes annually and may be varied upwards or downwards, depending on parental circumstances. Awards are made on the basis of the Taunton School 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 Chief Operating Officer (COO) to reflect any changes in fee costs. Though awards are generally tied to this scale, they may be varied upwards or downwards depending on individual parents' 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.

### ***Hardship Awards***

Parents of current pupils may apply for a Hardship Award if there is a significant change in their financial circumstances (for example a redundancy or critical illness) which could not have been foreseen at the time of entry. When considering such applications, account will also be taken of a report on the pupil's contribution to the life of the School.

### **Application Process for Assisted Places**

Details of the Scholarship and Assisted Places application process are available from the Admissions Office and are on the website.

- **Step One.** When a parent applies for a place for their child at Taunton School and asks for more information about Scholarships or assistance with fees, the Admissions Team will give them the relevant information pack. All scholarship application forms ask parents to confirm whether or not they require financial assistance. If they do, they are offered the opportunity to complete a means-test to establish their eligibility for an assisted place.
  - If a Scholarship is not appropriate or possible at the date of application, the Admissions Team will still offer parents the opportunity to complete a means-test to establish their eligibility for an assisted place, independent of any Scholarship Award. Parents are required to follow the normal registration and admissions procedures.
  - The confidential Financial Circumstances form seeks to establish the financial circumstances of the household. The form, which requests details of income and capital, may be found [\[here\]](#) must be accompanied by full documentary evidence. The completed forms, together with the necessary documentary evidence, are to be returned to the Admissions Office.
- **Step Two.** The Finance Director will assesses all assisted places 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 COO or her representative, visiting the parents' home to ensure the

information has been correctly interpreted and the basis of the financial assessment has been fair.

- Step Three. The Finance Director prepares a recommendation in accordance with the Taunton School Scale of Awards, which the Headmaster considers and a recommendation is then reached. Awards will be made giving due consideration to the school's financial position at that point in time.
- Step Four. The parents are advised by the Admissions Team whether their child is to be offered a place at the School and whether or not they will be made a Bursarial Award offer. The child may be offered either a Scholarship Award or an assisted place or both or none.
- Step Five. Parents are then required to sign a letter accepting the place at the school and an acknowledgement agreeing to any conditions relating to the award.

#### The Case for Assistance.

The Headmaster and COO 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 Scholarship examination results or other assessments, but potential will also be considered. Funds for assisted places 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 progress following admission and possess the potential to do so, 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 and admissions procedures before any award is made.
- Financial Limitations. The level of financial support is not influenced by the level of the 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 bursarial awards are well focussed and so, as well as current earnings, other factors which will be considered in determining the necessary level of grant which 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 (for example a military spouse who is required to move house often).
  - 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 an assisted place:
  - Frequent or expensive holidays.
  - New or luxury cars.
  - Investment in significant home improvements.
  - A second property/land holdings.
  - A large amount of equity held within property.
- Other Factors. It is recognised that, in addition to 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/guardians separating.

### **Confidentiality and Conditions of Award**

The School respects the confidentiality of the financial details of assisted places offered and recipients are expected to do likewise. It will usually be made clear in the confirmation letter that the amount of the award remains confidential and should not be discussed outside immediate family either by parents or pupils. Breach of confidentiality by a parent may result in the withdrawal of an assisted place.

All scholarships and assisted places are subject to the School's Conditions of Awards which are appended to this policy.

#### **Scholarship, Award or Assisted Place: Conditions of Award**

- 1 **Grant of the award:** An award is granted at the sole discretion of Taunton 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 Parents:** 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 periodic review and the Parents shall, on request, 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 should there be a change in financial circumstances.
- 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 satisfying 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 to 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 Headmaster acting in good faith:
- 7.1.1 the Parents have not satisfied the School's financial requirements under clause 4 and clause 5.1; or
- 7.1.2 the School 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 and any appeal should follow the school's complaints procedure
- 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 Headmaster 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 Headmaster 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 proper Notice;

It should be noted that an award can be terminated at the absolute discretion of the Headmaster.

- 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 \_be repayable. Taunton School will seek all legal options to achieve full repayment of any award in the event that a parent is shown to have not given full financial information; or

7.3.2 under clause 7.2.1 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 **Cancellation and Withdrawal:** For the avoidance of doubt, the benefit receivable under an award will not apply to the Parents' liability to pay the first Term's Fees if less than a Term's Written Notice of Cancellation is given, or to any Term for which the School requires payment of Fees in lieu of Notice following Withdrawal without proper Notice.

**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.



### SCHOLARSHIP AND FINANCIAL ASSISTANCE FLOW CHART

