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## **SCHOOL BURSARIES, SCHOLARSHIPS AND FEE DISCOUNTS POLICY**

### **1. INTRODUCTION**

Woldingham School has a long history of providing financial assistance to enable students of all backgrounds to benefit from the outstanding education it provides.

The School welcomes applications from children who would only be able to take up their place with financial assistance, as well as from families of existing students at the School who encounter financial difficulty due to a change in circumstances.

The School also offers scholarships for excellence in academic studies, music, art, drama and sport. However, only academic scholarships include a fee discount, with co-curricular scholars being supported by additional activities and offers.

Fee discounts include:

- Bursaries
- Academic Scholarships
- Head's Awards
- Sibling discounts
- Armed Forces/Foreign & Commonwealth Office (FCO) discounts
- Staff discounts

This Policy should be read in conjunction with the School's Admission Policy.

### **2. KEY PRINCIPLES**

The School is a charity, and the funds for financial assistance come from donations and the school's annual operating budget. It is therefore extremely important that the limited funds available are allocated responsibly, with thorough consideration of each family's circumstances.

In addition to the public benefit, it is recognised that there is positive value of scholarships and bursaries to the school's recruitment process as well as its wider public impact. However, it is important to balance the need to sustain pupil roll, with the ability to optimise the number of full fee-paying pupils, such that sufficient spaces are available without incurring significant incremental costs of establishing additional classes / sets.

The Head and Director of Finance & Operations are responsible for agreeing the offers of bursaries, scholarships and Head's Awards, with reference to the budget approved by Governors. Any awards that would materially exceed the budget must be discussed and agreed with the Chair of the Resources Committee.

All offers of financial assistance are confidential in all respects, between the parents and the School and as such information may not, under any circumstances, be shared with other persons, parents or possible prospective parents. Any breach of this confidentiality may be considered a breach of the terms of the agreement for financial assistance, which may then be withdrawn.

### **3. BURSARIES**

All bursaries are means-tested, which means parents (to include carers and legal guardians) are asked to answer detailed questions and provide evidence of their financial circumstances

Bursaries may be awarded at any amount up to 110% of the day pupil fees (with the additional amount used to pay for extra expenses such as school transport or trips), depending on the depending on the financial, compassionate or other pertinent circumstances of applicants. In very exceptional circumstances a boarding bursary may be approved by the Governors.

Bursaries may be granted:

- as part of an application for a new entry to the School
- as a hardship award for existing pupils

There is a specific 'Local Girl' bursary for a pupil joining from a local, maintained primary school.

The school will also consider two bursary assisted places for students from the Royal Springboard Foundation scheme. Bursary support of up to 110% of fees will be available to enable students from disadvantaged or 'looked after' backgrounds to attend the School.

#### **3.1. Suitability**

In assessing a child's suitability, attention will be given to the academic assessment of each applicant, however, academic potential and potential in extra-curricular areas will also be considered in addition to actual achievement.

School bursary funds will be limited and those judged most suitable will be given priority for such funds to enable them to gain the 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;
- Possess the potential to develop the quality of her work and benefit from participation in the wider, extra-curricular activities on offer at the school.

In normal circumstances, each applicant should exceed the school's normal academic requirements, and previous school reports will also be consulted.

#### **3.2. Financial Assessment**

The School uses an external agent, Bursaries Administration Ltd ('BAL'), to collate and assess financial information, including carrying out interviews with parents / legal guardians. The following assessment is undertaken:

- Assessment of total family income from all sources;
- Review of full value of all assets held;

- Review of age/value of all vehicles held;
- Review of all outgoings – the aim is to ensure that *reasonable* outgoings are claimed in respect of maintaining a sustainable existence for the whole family without any excess expenditure;
- Review of all liabilities.
- Finally, review of income and reasonable outgoings provides an assessment of ‘free cash’ to support the education of a child.

The process is part formulaic and part subjective to arrive at an equitable solution, and BAL provide a report to the school with a recommendation of the level of support that would be required based on the parents’ circumstances. The Head and Director of Finance & Operations are not bound by the recommendations of any such report.

Each case is assessed on its own merits and awards 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 therefore, in addition to current earnings, other factors will be considered in determining the necessary level of grant. The following list is provided as a guide:

- Financial assistance will normally only be awarded where both parents are working and contributing to the household income, unless incapacitated or providing full-time care for pre-school age children or other dependants. In the case of separation or divorce, both parents would normally still be expected to contribute financially to their child’s education and participate fully in the application for financial assistance.
- A family applying for financial assistance should be able to demonstrate that they are living within their means, with living arrangements and household expenditure that are affordable within the family’s combined income. Assistance is unlikely to be awarded where families have prioritised expenditure on other activities ahead of their child’s education, such as frequent or expensive holidays, new or luxury cars, significant home improvement works, or significant voluntary donations to other charitable causes.
- Where a family has the opportunity to release capital, significant capital savings and investments would be expected to be used for the payment of school fees, as would equity value in houses. The ownership of more than one property is likely to result in the rejection of an application.
- Any contribution to household costs by other, wider, family members, any adults unrelated to the child or by outside sources will be taken into consideration.
- Where a family already pays fees for a sibling at another school, it would be expected that the family would contact the school to request that financial assistance is shared between the two schools, rather than provided only by Woldingham.
- Other social factors/needs and mitigating circumstances will be considered.

Where a family already pays fees for a child at the School and subsequently applies for a bursary on entry for a sibling, any incremental assistance will cease when the older sibling leaves the School.

### **3.3. Hardship Bursaries**

Where funding allows, the school will in normal circumstances set aside in the budget each year a hardship fund for cases of sudden, unforeseen need.

A hardship bursary will be considered in cases where a change in parents’ or guardians’ financial circumstances results in difficulty in meeting the tuition fees, with the result that a child might be

withdrawn part way through a key stage of education. Having the child in mind, the aim is reduce temporary financial hardship, however, such a bursary would not be regarded as an ongoing provision by the school. Hardship awards will usually only be given for a limited time period.

Other factors that may be taken into consideration are:

- Where a parent or guardian is terminally ill or is unable to secure permanent employment owing to poor health;
- Where a separation indicates that a child will be withdrawn from the school adding to the stress of coping with the parents/guardians separating, and in this case, the contribution to be made by both parents;
- The amount of investment already made in the school (if any);
- The stage of education of the pupil – e.g. the lead up to public examinations.

### **3.4. Review**

Bursary awards will be subject to repeat annual testing of parental means and may be varied upwards or downwards, depending on parental circumstances.

For those already in receipt of bursaries, an award may be reduced or withdrawn where:

- a pupil's progress, attitude or behaviour has been unsatisfactory.
- parents/guardians have failed to support the School, for example by the late payment of extras or of any contribution they are making to the fees.

Where a pupil in receipt of a bursary is awarded a scholarship, Head's Award or other fee discount, the amount of the bursary will be adjusted accordingly so that the total fee remission does not exceed the amount of the original bursary award.

## **4. SCHOLARSHIPS**

A respect for scholarships and intellectual values is a clear goal of Sacred Heart education and thus at the core of Woldingham's vision for its students. Scholarships recognise a girl's skills and achievements and improve the quality of pupil intake. The scholarship programme reflects the School's areas of excellence and recognises achievements and potential. Scholarships are awarded at in the following areas at 11+, 13+ and the Sixth Form:

- 11+: Academic, Art, Drama, Music, Performing Arts and Sport.
- 13+: Academic, Art, Drama, Music, Performing Arts and Sport.
- 16+: Academic, Art, Drama, Music, Science and Sport.

Recipients of scholarships may also, in case of need, apply for means tested financial assistance in the form of a bursary.

It is intended that a scholarship award will be appropriate for a student's entire education at Woldingham until the end of Year 11, conditional upon the maintenance of expected standards of behaviour, attendance, performance and effort.

### **4.1. Academic Scholarships**

Academic scholarships will attract up to a 10% fee remission.

## **4.2. Co-curricular Scholarships**

Scholarships in art, drama, music, performing arts and sport will not be accompanied by a fee remission. Scholars in these areas will instead be supported with additional resources and activities (e.g. instrumental lessons). Further details of the additional support can be found in the School's scholarship brochure.

## **5. HEAD'S AWARD**

A Head's Award may be awarded to an exceptional pupil, who shows high all-around ability. Head's Awards attract up to a maximum of 25% fee remission.

## **6. SIBLING DISCOUNTS**

Where more than one girl from the same family is attending the School, a discount of 5% on the day pupil fees will be offered to each sibling, except the eldest child.

The rate of 5% is subject to review and amendment from time to time by the Governors at their absolute discretion.

## **7. ARMED FORCES & FOREIGN & COMMONWEALTH OFFICE ('FCO')**

The school offers a discount of 20% on boarding fees payable for each daughter subject to one of the parents or the legal guardian remaining as:

- a member of HM Armed Forces and being in receipt of the Ministry of Defence Continuity in Education Allowance.
- a member of FCO and being in receipt of the FCO Continuity in Education Allowance.

The rate of 20% is subject to review and amendment from time to time by the Governors at their absolute discretion.

## **8. STAFF DISCOUNTS**

Woldingham School offers a generous range of staff discounts up to 40% of the day pupil fees for new pupils who are the daughter of a member of staff. The level of discount offered will depend upon the proportion of timetable or full-time equivalent worked in accordance with the following bands:

<b>Full Time equivalent</b>	<b>Discount</b>
• Less than 0.2	No discount
• 0.2 to 0.4	20% discount
• 0.41 to 0.6	30% discount
• 0.61 to 1.0	40% discount

If the school reduces a part-time employee's working time, then the originally agreed discount will continue to apply. Increases in working time will earn an increase in the discount available up to the maximum for full time employment. However, if a full time or part-time employee voluntarily reduces their own work time, then a reduction in the fee discount awarded will be applied in accordance with the banding given above.

Existing pupils may benefit from different staff discounts to those set out above. It should be noted that the level of discount offered to a staff member will be that prevailing at the time of entry of their

child into the School and not that prevailing at the time when the staff member commenced employment with the School.

There is, however, no contractual agreement with any staff member to provide a discount on fees for daughters entering the school. Whilst the School will endeavour to maintain the level of discount offered to a staff member when their child joins the School, it reserves the right to adjust the level of discount awarded should the circumstances of the School so dictate.

Sibling discounts will not be available to staff having more than one daughter at the school.

Staff may also apply for a level of bursary support and any such application will be assessed in line with the bursary policy (above).

### **8.1. Tax position**

The tax-free benefit of schools' fee remission was established by *Pepper v Hart* [1993]. Woldingham School must demonstrate, as necessary, to the Revenue and Customs that the net fee paid by any staff member covers the marginal costs involved of educating their child in a school which is not full.

It is understood that the HMRC will likely challenge any reciprocal fee arrangements between schools for staff and will insist that the education of a child of a teacher at another school does not fall within the *Pepper v Hart* ruling. Reciprocal arrangements cannot be regarded as a tax-free benefit, and thus it is Woldingham School policy not to offer any reciprocal arrangements.

## **9. OTHER SOURCES OF FINANCIAL ASSISTANCE**

The School encourages parents to seek advice and financial assistance from other sources, in particular via the Educational Trusts' Forum, which is an association of educational charities that work to give young people the best start in life including financial assistance.