

## Forres Sandle Manor (Non-Academic) Policy

Policy Title	Fee Remission Policy
Policy Lead (Appointment (& Initials))	Bursar (CIJ)
Date of Last Review	Jul 2019 (amended Nov-19)
Date of Next Review	Jul 2020

### FEE REMISSIONS: OVERVIEW

- FSM Governors offer a degree of financial remission from the full cost of school fees through 3 different approaches:
  - Discounts
  - Bursaries
  - Scholarships
- This policy outlines the nature, qualification and limitation of each approach. The policy becomes effective from **1 Apr 19** and will be reviewed annually.
- Authority for Awards. Guided by this policy, conditions for the award of a discount, bursary or scholarship will be determined and implemented on the authority of the Fees Remissions Committee (FRC). Membership of the FRC is Chair of Governors, Chair of Finance and General Purposes (F&GP) Committee, the Headmaster and the Bursar.
- Conditional Caveat. In all cases, awards are conditional upon the pupils making reasonable academic progress and, where applicable, within their scholarship field. Moreover, the pupil will be expected to maintain good standards of attitude and behaviour throughout their time at FSM. Awards may be withdrawn in the event of a breach of FSM rules or serious misconduct.

### DISCOUNTS

- FSM has a range of discounts designed to recruit and retain pupils. Parents may benefit from more than one discount (*viz: it is possible for a sibling discount and scholarship award to be granted in addition to any initial discount awarded*).
- To ensure the continuing financial viability of FSM, the overall level of discounts available each year will be set by the Fee Remissions Committee (FRC). With the update of this policy (wef 01 Apr 19) any pre-existing remissions discounts are withdrawn.
- Discount levels set by the FRC will be approved and endorsed by the F&GP Committee.

- Existing discounts (those discounts previously awarded and currently applicable) will be reviewed by the FRC at the end of Year 2 and Year 5 and, where necessary, amended to reflect FSM strategic objectives and any changes to the financial position of parents.
- The maximum levels of discounts are shown below. The Head may award discounts up to the maximum but, without prior approval by the FRC, has no discretionary power to increase the level of discount beyond that shown.

### Type and Levels of Discount

Discount Type	Maximum Allowable Discount	Comments
<b>Individual</b>		
First Child	10%	Within prescribed maximum, the level of discount to be applied will be set by the Head
Sibling 2 <sup>nd</sup> Child	15%	An additional 5% discount is automatically applied to the second child
<b>Family</b>		
Sibling 3 <sup>rd</sup> Child	15%	The discount applies to <b>the total</b> full fee cost (tuition, boarding) of all 3 children from the same family
Sibling 4 <sup>th</sup> Child and greater	20%	The discount applies to <b>the total</b> full fee cost (tuition, boarding) of 4 or more children from the same family

- Applications. Applications for a discount are to be submitted to the Bursar's office for consideration by the Head or, where appropriate, the FRC. Applications from prospective and existing parents can be submitted at any time. The Bursar's Office will maintain a register of applications and approvals.
- HM Forces Discount. Military families are eligible for discounts against tuition fees (and boarding fees if applicable) as detailed in Table 1. HM Forces discounts will be granted at the maximum level regardless of individual financial circumstances. It is possible for a pupil to attract HM Forces discount, sibling discount and scholarship.
- Sibling Discount.
  - An additional 5% discount is offered against tuition fees (and boarding fees if applicable) for the second pupil.
  - When a sibling leaves FSM, the level of discount applicable will automatically revert to the lower level e.g. when a fourth child leaves the school the discount will reduce from 20% to 15%.
  - When there is only one child remaining at FSM any previously awarded sibling discount will lapse.

- Sibling arrangements already in place prior to 1 April 2019 will continue.
- Sibling discounts are granted regardless of individual financial circumstances.
- Early Withdrawal Penalties. Discounts will typically be awarded on the assumption that the pupil will remain at FSM for a defined and agreed period of time. For children entering the lower years i.e. Reception, Nursery, Years 1 and 2, any discount offered will be based on the assumption that the child will remain at FSM until the end of Year 2. For pupils entering at Year 3 and beyond, the assumption is that the child will remain at FSM until completion of their Year 8 studies. Unless a withdrawal date before the end of these stages of education is explicitly and specifically declared by parents/guardians and agreed by the Head beforehand, FSM reserves the right to recover some or all of any discount awarded in the event of a pupil leaving FSM early i.e. before the end of Year 2 or Year 8.

## **BURSARIES**

- The Governors are committed to broadening access to FSM by offering to eligible parents (and/or guardians) means-tested financial support towards the payment of school fees. Such support is known as a Bursary. These are usually awarded in the form of a discount towards tuition fees, depending on the financial, compassionate or other pertinent circumstances of applicants.
- All bursaries will be subject to FRC scrutiny and approval and will be non-discriminatory.
- Applications. A bursary can be for applied for at any time.
  - The level of a bursary is determined by the extent of financial need. Applicants are required to complete a means-test application and include a covering letter in justification of the application. Where the FRC resolve that there is no financial need, no bursary will be granted.
  - The means-test application requires details of the family income and regular commitments such as mortgage payments. Unearned income must also be shown. Details of other children in the family are required and information about their current status whether attending school or place of further education, or in employment. This aims to provide a clear picture of the family's position in order to allow the FRC to reach a balanced assessment.
- Bursary Considerations and Guidelines. The FRC will consider a number of factors when making a judgement as to the justification for support, and the extent of such support. The circumstances of each case are likely to be unique and hence, there are no prescriptive rules. The following considerations and guidelines are, however, pertinent:

- Level of Award. The level of Bursary award will be decided by the FRC.
  - Length of Award.
    - Bursaries are normally awarded on the basis that assistance will be provided only for as long as they are required.
    - By default, awards will be granted for **one year** and then be **subject to FRC review to confirm the recipient's financial circumstances and continuing need for support.** If circumstances have improved sufficiently, then the bursary may be reduced, or removed to enable financial support to be reallocated to another recipient. The review may, exceptionally, conclude that circumstances warrant an increased bursary award. In this case, the increased award will be applied with immediate effect.
  - Suitability.
    - An assessment will be made of the pupil's academic capability, both potential and achieved.
    - Priority will be given to those pupils most likely to gain from the educational provision.
    - Supported pupils will be expected to make sound progress and participate in the wider, extra-curricular activities of FSM.
  - Financial Limitations.
    - Bursary awards will be related directly to the extent of need. Each case is assessed on its own merits and will be subject to FSM's ability to fund them.
    - Judgements about what sacrifices a family should make to pay school fees will be personal. However, the FRC must ensure that all bursaries are justified and, as such, will consider:
      - Current earnings (all parents/guardians).
      - Ability to improve the financial position or earning power of the family. For example, are both parents/guardians earning?
      - Opportunities to release capital. FSM expect significant capital savings, investments and unreleased equity in second homes and other properties to be used to fund school fees before an application for a bursary was submitted.
      - In cases of separation, a contribution from the absent parent/guardian would be expected.
      - Contribution to living costs by members of the wider family, adults unrelated to the pupil or from other sources.

- The following conditions would not be consistent with the receipt of a bursary:
  - Frequent or expensive holidays
  - Purchase of new or luxury cars
  - Investment in significant home improvements
  - A second property/land holdings
  - Retaining investments including shares and ISAs
  
- Other Factors. It is recognised that, in addition to academic ability and financial constraints, there may be other circumstances that warrant consideration. These might include:
  - Where a child has siblings at FSM
  - Where the social needs of the child are relevant (may be suffering, for example, from bullying at their current 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 a child potentially having to be withdrawn from FSM and thereby adding to the stress of coping with the separation of parents or guardians.

## SCHOLARSHIPS

- FSM offers several scholarships a year for excellence. They are granted regardless of financial need and will be available for internal and external candidates.
  
- The granting of scholarships will not normally require FRC endorsement (but see below).
  
- Purpose of Scholarships. Scholarships are designed to reward excellence and celebrate exceptional talent. The successful scholar is normally offered a fee reduction (at the discretion of the Head and within guidelines below) throughout his/her time at FSM.
  
- Scholarship Applications and Level of Remission.
  - Details of scholarship arrangements will be sent to all individuals who express an interest.
  - Similar to other independent schools, the value of any scholarship award is minimal. Parents of scholars who anticipate they may experience difficulty in meeting the balance of the tuition fees should consider applying at the same time for a means-tested bursary.
  - The maximum allowable Scholarship remission is 10% of the full tuition fee for a single day pupil in the year of application/entry.

- Prospective and current parents can apply for a scholarship any time during the school year.
- Subject to satisfactory pupil performance, scholarships are held for the duration of the pupil's time at the school. Where a conditional scholarship has been awarded e.g. for a specific period of time, a review will be conducted at the end of the period. Continuation of the scholarship will be dependent on pupil conduct and performance.
  
- Relationship to Fee Discounts. Award of a scholarship does not preclude another form of fee remission being awarded.
  
- Academic Scholarships:
  - Scholarships are available for pupils of outstanding academic ability.
  - Candidates who apply for academic scholarships will be required to sit a standardised maths test and a standardised reading test, produce a piece of free writing and read a passage from a book of FSM's choice.
  - All candidates will be interviewed by either the Head or Deputy Head (Academic).
  
- Music Scholarships:
  - Music scholarships are awarded to outstanding musicians who play any instrument or sing with exceptional ability. Candidates must obtain a specialist reference from their current Head of Music/Music Teacher in addition to a reference from their Head.
  - Potential scholars will be interviewed by the FSM Director of Music and be required to complete aural and practical tests and perform short pieces on the instrument(s) of their choice.
  - He/she will be expected to demonstrate enthusiasm for, and commitment to, music and will be expected to make a contribution to the musical life of FSM throughout their time here.
  
- Sports Scholarships:
  - Sports scholarships are awarded to outstanding candidates who have achieved a high level of competence in one or more sports. They will be assessed and interviewed by the FSM Director of Sport and will be required to provide a specialist reference from their current Head of Games.
  - They will be expected to make a contribution to the sporting life of FSM throughout their time at FSM.

- Art Scholarships:
  - Art Scholarships will be awarded to children who show scholarly potential in either Art & Design or in Design & Technology.
  - Candidates will be required to present a portfolio of recent and current work that has been produced both in school and at home. The portfolio needs to show wide-ranging attempts at working in different media and include both 2D and 3D work.
  - For potential Art scholars, a reference from the child's present Head of Art indicating the child's ability to contribute enthusiastically and a willingness to make effective use of a full range of art facilities will be required.
  - Candidates will be interviewed by the Head of the Faculty of Creative Arts and will be asked to make an observational drawing.
  - For potential design and technology scholars, a portfolio containing a selection of working drawings and 3D models demonstrating the child's ingenuity and approach to solving problems will need to be submitted. Potential scholars will be interviewed by the Head of Design Technology and given a practical task to complete.
  
- All-Rounder Scholarships:
  - These are awarded for a strong performance in the academic tests, combined with a high degree of excellence/potential in two or more of the following areas: Art, Music, or Sport.
  - Candidates will be required to sit all relevant assessments and will be interviewed by the Head/Deputy Head (Academic) and where necessary, the respective Head(s) of Faculty.