



BURSARY POLICY

St Michael Abbey School

This policy outlines the framework through which the school assesses, allocates, and administers bursarial support to eligible families, ensuring equitable access to education regardless of financial circumstances. It details the application procedures, assessment criteria, confidentiality measures, and ongoing review processes to maintain transparency and integrity. The policy supports the school's commitment to widening access and fostering a diverse and inclusive student body, in alignment with its charitable aims.

Marketing and Admissions
admissions@sma-school.com



1. INTRODUCTION

- a. St Michael Abbey School is committed to broadening access to the school by offering to eligible parents/guardians means-tested financial support for the payment of fees. Such support is known as a bursary and it may be awarded, depending on financial and other relevant circumstances of applicants.
- b. Bursary awards and other concessions are largely financed from the school's current income and reserves, so the amount allocated to bursary awards will vary depending on the level available in any year.
- c. St Michael Abbey School appreciates that the bursary process will be unfamiliar to some people and is committed to helping applicants to follow the process for applying. The Admissions Team is the point of contact for such applications and will provide advice and assistance as required. This policy is made available on the Admissions page of the school website.
- d. Bursaries are awarded following a means tested assessment of the applicant's circumstances. Applications are made to St Michael Abbey School and analysed independently by Bursary Administration Ltd (BAL) (www.schoolbursaryguide.com) who will provide a report to the school. More details are found below.
- e. Bursaries are awarded at the discretion of the school governing Board, who are responsible for the financial management. At least annually, an anonymised list of bursary awards is presented for information and review.
- f. Available bursary awards are subject to a termly review and may be varied upwards or downwards depending on funds available. In each Summer term the school will contact all current bursary holders to commence the review process.
- g. St Michael Abbey School may reduce or withdraw an award where the parents/guardians have failed to support the school, for example by the late payment of fees or where there have been behaviour issues. This may be done at any time.
- h. Requests for financial support usually fall into two categories:
 - i. New students to the school, where a place has been offered but parents/guardians are unable to fund all the tuition fees.
 - ii. Existing students 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.

These categories include students whose parents'/guardians' work at the school.

2. NEW STUDENTS

- a. Awareness. Advice on financial support will be offered to prospective parents on request.
- b. Eligibility and Application. Bursaries may be made available to parents/guardians of children entering St Michael Abbey School.



- i. **Step One.** Parents/guardians seeking a bursary are required to complete an application form via a link emailed to them by the Admissions Team once they have completed the Registration Form and paid the registration fee (unless this is waived). This form is used to establish the financial circumstances of the household and anyone else who is liable for the fees. Where birth parents are separated and have joint parental responsibility, both parents will be required to complete an application form. The Admissions Team will review the form for eligibility before forwarding it to BAL for analysis.
 - ii. The form must be accompanied by documentary evidence of income, capital, significant expenditure and liabilities. For new students, applications will be sent to BAL for assessment before an offer for a place is made. Applications from existing students will be sent to BAL for assessment before the start of the next term.
 - iii. **Step Two.** BAL meets by Zoom with parents/guardians to review the application and will then submit a report to the school.
 - iv. **Step Three.** BAL prepares recommendations for consideration.
 - v. **Step Four.** Parents/guardians are advised of the bursary offer before the deadline for acceptance of places/start of the next term. Parents/guardians are required to sign a letter accepting the bursary and an acknowledgement agreeing to any conditions relating to the bursary.
- c. The Case for Assistance.
- d. The Admissions Team will consider several 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.
- i. **Suitability.** In assessing a child's suitability, attention will be given to the assessment. Each pupil to whom support is offered must, in the opinion of the Admissions Team be likely to make sound academic progress following admission and possess the potential to develop the quality of their work, and benefit from participation in the wider, extra-curricular activities on offer at the school. Each applicant should meet the school's standard academic requirements as is the case for all applicants.
 - ii. **Financial Need.** The amount of bursary support available covers up to 20% of fees. This 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 them within the context of its overall budget. It is recognised that judgements about what sacrifices a family should make to pay fees will be personal. However, the school has a fiduciary duty to ensure that all bursary awards are well focussed and so, as well as current earnings and expenditure, other factors which will be considered in determining the necessary level of award will include:
 - 1 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.



- 2 Opportunities to release any capital. Significant capital savings and investments would be expected to be used for the payment of fees, as would equity values in houses.
 - 3 In cases of separation a contribution to be made by the absent parent/guardian.
 - 4 Contribution to household costs by other, wider, family members, any adults unrelated to the child or by outside sources.
 - 5 Where fees are being paid to other schools or universities the school's grant will take into account such outgoings.
- iii. 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.
- iv. **Other Factors.** It is also recognised that, in addition to academic ability and financial constraints, there may be other family or social circumstances which should be considered.

3. EXISTING PUPILS - CHANGE IN FAMILY CIRCUMSTANCES

- a. Subject to availability, the school will also consider applications for current students in cases of unforeseen need. Current parents/guardians should contact the Admissions Team for advice.
- b. Parents/guardians of current pupils who wish to apply will do so in the same way as for New Applicants, which may include analysis by BAL. Depending on the urgency, applications will be reviewed alongside those for prospective pupils, or separately outside the normal cycle.
- c. The receipt of a bursary award in these circumstances would normally be inconsistent with a high level of discretionary extras, e.g., non-academic trips. In addition, a bursary would not normally be granted if there are significant arrears on fees.

4. OTHER CONSIDERATIONS

Confidentiality. St Michael Abbey School respects the confidentiality of bursary awards made to families and recipients are expected to do likewise. The school and BAL will comply with all data protection legislation in processing sensitive information.

Other Sources of Bursary Assistance. There are a number of educational and charitable trusts which provide assistance with tuition fees. In the majority of cases, they are to assist children who are already attending a fee-paying school and due to a change of circumstances may be unable to remain. The school 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 is available from the Admissions Team.



SCHOLARSHIPS

Scholarship awards include:

- a) Academic Excellence Scholarship
- b) Music Academy Scholarship
- c) Staff Scholarship
- d) Business Partner Scholarship

Scholarship values are equivalent to discounted fees and may be topped-up with fee support by a means-tested bursary. The combined financial support provided by a scholarship and/or bursary will not exceed a 50% discount towards fees. The application process for a supporting bursary will follow the process outlined above.

