



Rugby School

## **Foundationship & Scholarship Augmentations and Bursaries Policy**

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September 2021

## Responsibility for updating this policy: Finance Director

### Introduction

The Governing Body of Rugby School is committed to broadening access to the Schools to students who would benefit from an education provided by a member of the group, by offering financial support towards the payment of school fees to parents or legal guardians who are otherwise unable to afford them. There are a range of awards that offer the chance to access means tested support:

**Scholarship and Foundation Awards:** Parents or legal guardians of students may apply for and be awarded a Scholarship or Foundation Award which entitles them to accept a 5% fee concession. More than one Scholarship can be awarded although the total fee reduction available is limited to 5%. In some cases, those receiving Scholarships will in turn generously elect to donate the remission to the School, usually to the Arnold Foundation. This is expected to include Choral Scholarships once the chorister programme commences at Bilton Grange.

**Arnold Foundation Awards:** Parents or legal guardians of students may seek the support of the Arnold Foundation at Rugby School or the Earle Fund at Bilton Grange. These awards are subject to both specific eligibility criteria such as the 'Need to Board' and also to means testing suggesting the necessity of at least 90% support by way of fee remissions.

**Head Master's Discretionary Awards:** Additionally, at the Executive Head Master's discretion, exceptional awards with a fee concession which may be greater than 5% can be made where, during the assessment process, exceptional potential is identified.

Collectively, Scholarships, Foundationships, Head Master's Discretionary Awards and Arnold Foundation Awards are referred to as "Awards" in this policy.

**Means Tested Awards:** Qualification for the above Awards entitles the parents to seek additional support through a means testing process. The level of support provided to Scholars, Foundationers, Arnold Foundationers and HMDA Recipients can then be augmented up to 100% of School fees subject to means testing and in certain exceptional cases awards may also cover certain essential extras.

**Means Tested Hardship Awards:** The School will also give consideration to those who do not qualify as Award recipients receiving hardship support on a means tested basis where there has been a change in circumstances that necessitates the award (see below). This is usually (but not exclusively) undertaken with a view to supporting the continuity of education of the student or child through to the next natural break point.

Means Tested Awards and Means Tested Hardship Awards will together be referred to as "Bursaries" in this policy.

In order to promote awareness of the availability of means-tested financial assistance for places at the School, information is included with the School prospectus, on the School website and in advertisements in the local and national press.

### Eligibility

Parents or legal guardians of children who have received an Award may apply, at any time, to have the Award augmented on a means tested basis.

Parents or guardians of children already at the School who have not been awarded a Foundationship or Scholarship may apply for a bursary if there is a significant change in circumstances (for example a reduction in earnings or a redundancy) which could not reasonably have been foreseen at the time of entry into the School. In such cases, bursaries would not normally be approved until the student has completed one academic year at the School. When considering such applications, the School will take account of a report, usually from the relevant Housemaster, Housemistress or the Head of the School, on the student's contribution to the life of the School.

### The Application Process

1. Parents or legal guardians seeking an augmentation are required to complete an application form (Confidential Statement of Financial Circumstances) which requests details of income, outgoings, assets and liabilities. Forms can be obtained from, and completed applications together with the required documentary evidence returned to, the Finance Director at: -

Email: [funding@rugbyschool.net](mailto:funding@rugbyschool.net)

**All applications for bursaries and augmentations for new entrants must be completed fully and submitted to the above email address no later than the closing date for applications of the relevant scholarship examination, details of which can be found in the Admissions section of the School's website or from the Registrar.**

Completed bursary applications received after the closing date may not be assessed until after the result of a scholarship application is known

We are not able to provide an indication of the amount of financial assistance that may be available until the Registration Form has been completed and returned to the Admissions Office, together with payment of the Entrance Fee (if applicable).

Applications arising from a significant change in financial circumstances may be submitted at any time.

2. The Finance Director will assess all applications and will usually request the assistance of a third party bursary assessment company including attendance at a meeting with the parents or guardians either at their home or by video-conference call to ensure that the information declared has been correctly interpreted and, therefore, that the financial assessment has been carried out in a fair and consistent manner.
3. The Finance Director will make a determination in accordance with the School's assessment process on augmentation and bursary awards. The amount of an award is not influenced by the level of academic ability of the child, but by the extent of financial need. The School's decisions on all applications are final.

### Considerations in the Assessment Process

Each application is considered on its own merits. It is recognised that judgments about what sacrifices a family should make to pay school fees will be situation specific. However, the School seeks to ensure that any financial support it offers is well focussed and targeted towards those most in need on as consistent a basis as possible. Therefore, in determining the appropriate level of assistance to be offered, in addition to current earnings, other factors will be considered, including: -

- Family circumstances. The School will take family circumstances into account; the need to care for children under school age or to look after other dependants, or perhaps the particular requirements which one or other partner's work might impose on the other. In some cases, one or both parents are prevented from working through incapacity. However, where there are two partners without very young children or dependents, the School normally expects both to be employed and a family's ability to improve its financial position or earning power will be considered.
- Costs associated with other dependants eg. sick or disabled parents or children, siblings' School fees contributions will be considered.
- Substantial realisable equity in the applicant's home and ownership of or interest in other properties or assets will be viewed as available to support the payment of school fees.
- In cases of separation, the contribution made by the non-resident parent.
- Contributions to school fees or household costs by co-habiting adults unrelated to the child (including those with no direct parental responsibility) and other family members with the capacity to support the child's education will also be considered.
- The level of fees for the child paid previously to other independent schools.
- Expenditure on holidays, cars and home improvements and the choices in spending made by the family.
- Potential usage of savings and investments that could be used for the payment of school fees.

It should be emphasised that an honest presentation of the family's financial circumstances is important. It is a condition of any means tested bursary that, if a parent has 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 may be repayable.

### **Review of Bursary Awards**

All awards are reviewed at least annually and may be increased or decreased if the financial circumstances of the applicants changes significantly. If the financial circumstances remain essentially constant from time to time, parents can assume that their proportionate contribution to School fees will usually change little, if at all. An interim review may be required where family's financial circumstances are in a state of flux.

Renewal of all Bursary awards are dependent upon the continued good conduct of the pupil or student and their participation in the life of the School and upon the parents and student treating the School and its staff reasonably and upholding the aims and the good name of the School.

A failure to complete the review on a timely basis will result in the removal of the bursary award.

### **A Final Note**

There are limited funds available for Bursaries and they are a rare opportunity for children and students to benefit from the education on offer at the Schools. As such, in order to allow the Schools to offer financial assistance to as many future applicants as possible, we would encourage parents and

students who have benefited from such awards to consider their own support as a 'debt of honour' where they would seek to in turn support others by repaying all or part of the bursary received when and if their circumstances allow.

Authorised Safeguarding, Compliance and Risk Committee	
Date:	22 September 2021