



UPPINGHAM SCHOOL

MEANS-TESTED BURSARIES POLICY

I. General

Uppingham School aims to broaden access to the School by offering means-tested financial support towards the payment of school fees to eligible parents or guardians. Such support is known as a Bursary. Bursaries may be awarded in the form of a discount of up to 100% on School fees payable, depending on the financial, compassionate or other pertinent circumstances of applicants.

Bursary awards are subject to the annual testing of parental means, and may be varied upwards or downwards depending on parental circumstances. Awards are made by the Headmaster on the basis of a financial assessment carried out by the Finance Manager.

Requests for financial support usually fall into two categories:

- New applicants to the School, where a place may have been offered but parents/ guardians are unable to fund the school fees.
- Existing pupils, where a change in parents/guardians' circumstances has resulted in difficulty in meeting school fees and may result in the child being withdrawn part way through their education.

In order to promote awareness of the availability of means-tested financial support, information is included with the School prospectus, on the School website and in external publicity.

2. The Case for Assistance

The Headmaster will consider a number of factors when making the final 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 the academic assessment of each applicant as well as the assessment of any

particular chosen speciality (e.g. art, music, sport, drama), but potential will also be considered as well as actual achievement. Bursary funds are limited, and those judged most suitable will be given priority as those most likely to gain educationally from the financial support. Each pupil to whom support is offered must, in the opinion of the Headmaster, be likely to make good progress following admission and possess the potential to develop the quality of his or her work, and benefit from participation in the wider, extra-curricular activities on offer at the School. In normal circumstances, each applicant will need to meet the School's normal academic requirements. Previous school reports will be consulted for evidence of good behaviour.

- **Financial limitations:** the amount of the Bursary award is not influenced primarily by a child's level of ability, but by the extent of financial 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 its overall budget. We recognise that judgements about what sacrifices a family should make to pay School fees will be personal to that family. However, the School has a duty to ensure that all Bursary grants are well directed, so that many factors, as well as current earnings, will be considered in determining the necessary level of grant. These 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, the requirements of their partner's work, or another substantial reason.
 - Opportunities to release any available capital. Significant capital savings and investments would normally be expected to be used for the payment of school fees, as would equity value in houses. Approved pension funds are not included within a parent's assets, although pension savings not approved by HMRC will be taken into account as assets in the award calculation.
 - In cases of separation, the contribution made by the absent parent.
 - Contribution made to household costs by other, wider, family members, any adults unrelated to the child or by outside sources.
 - 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 or land holdings

- **Other factors:** it is recognised that, in addition to academic and other ability and financial constraints, there may be other circumstances which should be considered. These might include but are not limited to:
 - Whether a child has siblings at the School;
 - Where the social needs of the child are particularly relevant;
 - Where a parent/guardian is terminally ill or is unable to secure permanent employment due to ill health;
 - Where a family separation or particular family difficulties have resulted in the child having to be withdrawn from the School, adding to the child's stress of coping with those difficulties.

3. The Application Process

Bursaries may be made available to parents/guardians of children entering any year group of Uppingham School. They are awarded at the discretion of the Headmaster in consultation with the Finance Manager.

Step 1

Parents/guardians seeking a bursary are required to complete a Confidential Statement of Financial Circumstances ('blue') form, which requests details of income, outgoings, assets and liabilities. Blue forms can be obtained from, and completed forms should be returned to: The Finance Manager, The Bursary, 20-24 High Street West, Uppingham, Rutland LE15 9QD, 01572 820627 or ljc@uppingham.co.uk.

Step 2

The Finance Manager passes completed blue forms to Bursary Administration Ltd ('BAL'), the School's agent. Shortly after receipt of the form, BAL will make contact with the parents/guardian to advise them of the documentation they need to make available to support the information provided on the form and to arrange a home visit to talk through the financial circumstances and discuss the application. These visits are undertaken at the applicant's home in a sensitive manner, and all information is treated in the strictest confidence.

Step 3

The Finance Manager submits the application and the BAL feedback to the Headmaster who decides how much bursary can be awarded. The Headmaster's decision about the allocation of bursaries is final.

Step 4

The parents/guardians are advised whether their child is to be offered a Bursary and are then required to sign an acknowledgement agreeing to the terms and conditions relating to the bursary (see Appendix I).

Application deadlines

4th form entry – Year 7 applicants

Bursary applications for 4th form entry are required by the end of November in the year that a place at the school is offered (i.e. 21 months before entry). We aim to communicate decisions to parents within 2 months; at this early stage they will be indicative only (see 5. below).

4th form entry – Year 8 applicants

Bursary applications are required within one month of a place at the school being offered. We aim to communicate decisions to parents within 2 months.

6th form entry

Bursary applications are required by the end of December in the year that a place at the school is offered. We aim to communicate decisions to parents within 2 months.

Bursary applications for entry into any other year group are required within one month of a place at the school being offered. We aim to communicate decisions to parents within 2 months.

4. Existing pupils – Change in Family Circumstances

Within overall budget funding, the School will in normal circumstances set aside each year a Bursary fund, for cases of sudden, unforeseen need, and for Bursary applications received in the normal calendar cycle for Bursary submission, scrutiny and award. This sum will be set within budgetary constraints. Parents/ guardians with a child at the School whose financial circumstances suddenly change may apply for a Bursary as in 3 above. Such awards are subject to the availability of funding and cannot be guaranteed.

5. Indicative Bursaries

Bursary offers made more than 10 months before entry can be indicative only, because fee levels, the amount of bursary funding available, and parents' exact financial circumstances at the time of entry will not be known. A further detailed assessment will take place each year in the Spring Term of the year of entry.

6. Annual Review

All Bursary awards are subject to annual re-assessment of parental means and may be varied upwards or downwards depending on parental circumstances. Current bursary holders will be issued with means-testing forms at the end of March each year for return by the beginning of May. For those previously in receipt of Bursaries, the Headmaster has the discretion to reduce or withdraw an award not only where a pupil's progress, attitude or behaviour

has been unsatisfactory but also where the parents/guardians have failed to support the School, for example, by the late payment of any contribution they are making to the fees.

6. Confidentiality

The School respects the confidentiality of Bursary awards made to families, and recipients are expected to do likewise.

7. Overseas bursaries

The School's policy on overseas bursaries is that bursaries are generally available only to UK residents, partly related to the difficulty of assessing bursaries for overseas economic and tax regimes, and whose supporting documentation is in foreign languages. There may be two exceptions to this general policy:

- (i) The School may award 'hardship' bursary support for an overseas pupil already at the School, whose parents encounter genuinely and significantly worsened financial circumstances, and whom the Headmaster, exercising his discretion in consultation with the Bursar, wishes to retain in the School.
- (ii) Where an overseas applicant has been awarded a scholarship and an exceptional means-based case has been made, the Headmaster may use his discretion, in consultation with the Bursar, to award bursary support from funds not from gross fee income.

8. Other Sources of Financial Assistance

In addition to the School's Bursary Fund, there are a number of educational and charitable trusts which provide assistance with school fees. In the majority of cases, these are to assist children who are already attending a fee-paying school and due to a change in circumstances may be unable to remain in that school.

Uppingham 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 may be obtained from:

The Educational Trusts Forum and also The Joint Educational Trust
6 Lovat Lane
London EC3R 8DT
Email: admin@jetcharity.org
Website: www.jetcharity.org

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Uppingham School
Scholarship, Exhibition or Bursary

Conditions of Award

1. **Obligations of the Pupil:** A 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. These are the *Purposes of the Award*.
2. **Obligations of the Parent/s:** The parents are expected to support and encourage the pupil to achieve the purposes of the Award and to uphold the aims and the good name of the School. The parents are also required to pay the balance of the account by the first day of term.
3. **Withdrawal of the Award:** The Award may be withdrawn by written notice sent to a parent if, in the opinion of the Headmaster acting in good faith, the pupil or a parent has not complied with the obligations set out at paragraphs 1 and 2 above or otherwise the pupil has fallen below the required standards of conduct and progress and in the further opinion of the Headmaster there has been no significant improvement following consultation with a parent and/or the pupil and a written warning. Withdrawal of the Award shall take effect from the start of the following term.

Further, the Award may be withdrawn by written notice if the balance of the account remains unpaid 28 days after a written reminder has been sent to the parents.

4. **Repayment events:** Parents shall be required forthwith upon written notice to repay all or part of the benefits they have received under the Award in any of the following circumstances:
 - a) up to three terms' benefits (if received) if the pupil has engaged in serious misconduct or has been expelled or removed for reasons of misconduct by the requirement of the Head acting in good faith;
 - b) up to three terms' benefits (if received) in a case of the pupil being withdrawn for any reason during a school term without a term's written notice having been given.
5. **Fees in lieu of notice:** For the avoidance of doubt, the benefits payable under an Award do not apply to any term for which the School has required payment of fees in lieu of notice.
6. **Overnight and overseas trips:** From time to time the School organises overnight or overseas trips for the benefit of pupils, for academic, cultural or sporting reasons. Some of these trips may be expensive. The presumption is that parents in receipt of means-tested bursary support are not in a position to contemplate such trips for their children.

The School nevertheless recognises that an educational opportunity may be lost if a gifted child is unable, for financial reasons, to take part in an expensive overnight or overseas trip. In exceptional circumstances, therefore, parents in receipt of a bursary award may write to the Headmaster, setting out why they believe their child should be allowed to participate in such a trip.

The Headmaster may, at his discretion alone, permit the child to participate in a trip of this kind. In so doing he will take into consideration whether the trip is educational in nature, whether the child is a leader in the subject of the trip, and that the funds being

proposed for the trip are not at the expense of the School. In very rare cases he may consider the possibility of financial support, in which case the same ratio will be applied as the support provided under the main means-tested bursary.

7. **Terms and Conditions:** 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 terms and conditions as amended from time to time shall apply and these Conditions of Award shall be interpreted in accordance with them.