



RUGBY
SCHOOL
GROUP

Bursaries Policy

February 2023

Responsibility for updating this policy: Finance Director

1.0 Introduction

- 1.1 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:
- 1.2 **Foundation Awards:** Parents or legal guardians of day students in year 7 and up may apply for and be awarded a Foundation Award which entitles them to a 5% fee concession. Foundation Awards and Scholarships can be awarded simultaneously although the total fee reduction available is limited to 5% and recipients will be treated as Foundation Award holders. Foundation Awards will only be offered to students meeting specific eligibility criteria and only when means testing indicates that support is required.
- 1.3 **Scholarship Awards:** Parents or legal guardians of students may apply for and be awarded a Scholarship Award which entitles them to a 5% fee concession. These can range from Academic Awards to Sports Scholarships and numerous other academic or co-curricular areas. This would include Rugby Chorister Awards at Bilton Grange. Scholarship Awards include Head Master's Scholarships at Rugby School. More than one Scholarship can be awarded although the total fee reduction available is limited to 5%. In a number of cases, those receiving Scholarships generously elect to donate the remission to the Arnold Foundation. Co-Curricular scholarships will also offer certain additional financial benefits such as free music lessons for music scholars or Choristers or free drama or dance lessons for performing arts scholars.
- 1.4 **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 will only be offered to students from Year 7 and up and are subject to specific eligibility criteria and also to means testing suggesting the necessity of at least 90% support by way of fee remissions.
- 1.5 **Exceptional Bursary Awards:** At the Head Master of Bilton Grange's discretion, an exceptional bursary may be granted for children from Year 4 and up, subject entirely to means testing. These awards are typically limited to two per year group.
- 1.6 **Head Master's Discretionary Awards (HMDAs):** At the Head Master of Rugby School's discretion, exceptional awards with a fee concession which may be greater than 5% can be made. This is usually where, during the assessment process, exceptional potential has been identified.
- 1.7 Collectively, Scholarships, Foundation Awards, Head Master's Discretionary Awards and Arnold Foundation Awards are referred to as "Awards" in this policy.
- 1.8 **Means Tested Awards:** Qualification for the above Awards (other than HMDAs) entitles the parents to seek additional support through a means testing process. The level of support provided to Scholars, Foundationers and Arnold Foundationers can then be augmented up to 100% of School fees subject to means testing.
- 1.9 **Extras:** Additional support for Extras is provided for those on substantial Bursary Awards.

- 1.10 **Means Tested Hardship Awards:** The Schools will also give consideration to those who do not qualify as Award recipients receiving hardship support on a means tested basis where (1) there has been a change in circumstances that necessitates the award and (2) the student has been in the School for at least a full academic year (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.
- 1.11 Means Tested Awards and Means Tested Hardship Awards will together be referred to as “Bursaries” in this policy.
- 1.12 In order to promote awareness of the availability of means-tested financial assistance for places at the Schools, information is included with the School prospectus, on the School website and in advertisements in the local and national press.

2.0 Eligibility

- 2.1 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.
- 2.2 Parents or guardians of children already at the Schools who have not been awarded a Foundation Award or Scholarship may apply for a Means Tested Hardship Award 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 Schools. In such cases, bursaries would not normally be approved until the student has completed one academic year at the Schools. When considering such applications, the Schools 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.

3.0 The Application Process

3.1 Application

- 3.1.1 Applications are made via an online system and parents or legal guardians seeking a bursary or awards which require means testing are required to provide details of income, outgoings, assets and liabilities. Please contact funding@rugbyschool.net to begin an application.
- 3.1.2 **All applications for bursary awards for new entrants must be completed fully and submitted 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.**
- 3.1.3 Completed bursary applications submitted after the closing date may not be assessed until after the result of a scholarship application is known.
- 3.1.4 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).
- 3.1.5 Applications arising from a significant change in financial circumstances may be submitted at any time.

3.2 Assessment

- 3.2.1 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. The advice of any third-party bursary assessment company will be considered but should not be regarded as final.
- 3.2.2 The Finance Director will make a determination in accordance with the School's assessment process on bursary awards. The amount of an award is not influenced by the level of academic or other ability of the child, but by the extent of financial need. The School's decisions on all applications are final.

3.3 Considerations in the Assessment Process

- 3.3.1 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: -
- 3.3.2 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.
- 3.3.3 Costs associated with other dependants e.g. sick or disabled parents or siblings' school fees contributions will be considered.
- 3.3.4 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.
- 3.3.5 In cases of separation, the contribution made by the non-resident parent.
- 3.3.6 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.
- 3.3.7 The level of fees for the child paid previously to other independent schools.
- 3.3.8 Expenditure on holidays, cars and home improvements and the choices in spending made by the family.
- 3.3.8 Potential usage of savings and investments that could be used for the payment of school fees.
- 3.3.9 **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. It is important for the family to understand that on rare occasions repayment of past bursaries has been required where information has been shown to be materially false.

4. Review of Bursary Awards

- 4.1 All awards are reviewed at least annually and may be increased or decreased if the financial circumstances of the applicants have changed 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.
- 4.2 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.
- 4.3 A failure to complete the review on a timely basis will result in the removal of the bursary award.

5. A Final Note

- 5.1 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.

Approving Committee: Finance Audit & Estates Committee

Date: Subject to approval in February 2023