

UPPINGHAM SCHOOL

BURSARIES POLICY

1. Introduction

The Trustees of Uppingham School are committed to broadening access to the School to children who would benefit from an education at Uppingham, by offering means-tested financial support with the payment of school fees to eligible parents or guardians.

Such support is called a Bursary and may be awarded in the form of a discount of up to 110% on School fees payable, depending on the financial or other pertinent circumstances of applicants.

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

Parents should read this Policy carefully before submitting an application for Bursary support, and in particular, section 5 'Considerations in the Assessment Process'. Significant savings or investments and the ownership of property other than the home in which the child resides are unlikely to result in successful bursary applications and parents in these circumstances should not apply.

2. Eligibility

Requests for financial support usually fall into two categories:

- (i) New applicants to the School, where a place may have been offered but parents or guardians are unable to afford the school fees
- (ii) Existing pupils, where a significant change in parents or guardians' circumstances (for example illness, death or redundancy), which could not reasonably have been foreseen at the time of entry into the School, has resulted in difficulty in meeting school fees. In such cases, bursaries would not normally be approved until the pupil has completed one academic year at Uppingham.

3. Priority

Scholarship recipients who require bursary support will be prioritised for bursary awards over non-scholarship applicants. Remaining annual bursary funding will be allocated to pupils with financial need who are not at scholarship level, but who are nevertheless regarded by the School as having significant potential. Please also note that the School's bursaries budget is necessarily limited: awards will be subject to the availability of funds.

4. The Application Process

- 4.1 Parents or guardians seeking a bursary are required to tell the School of their application for bursary funding as part of the registration process and are expected to have read this Policy before entering the process. Parents or guardians will subsequently be asked to complete a Confidential Statement of Financial Circumstances ('blue') form, which requests details of income, certain outgoings, assets and liabilities. Blue forms can be obtained from, and completed forms together with the required documentary evidence, should be returned to, the Finance Director at:

The Bursary
20-24 High Street West
Uppingham, Rutland
LE15 9QD,
Email: ljc@uppingham.co.uk .
Telephone: 01572 820627

All blue forms for new entrants must be completed and submitted to the Finance Director no later than **30 September** (Lower Sixth entrants) or **31 December** (Fourth Form and Lower Fifth entrants) in the year before the proposed entry date.

Parents or guardians who submit bursary applications 12 months or more before the proposed date of entry will be given an indication of financial support that may be available*. Indicative assessments are subject to performance in scholarship tests, updating of financial circumstances and availability of bursary funding.

Bursary awards for Lower Sixth entrants will be confirmed at the same time as places are confirmed, at the beginning of December in the year before proposed entry.

Bursary awards for Fourth form entrants sitting scholarships will be confirmed at the same time as the relevant scholarship awards are confirmed. Bursary awards for Fourth Form and Lower Fifth entrants not sitting scholarships will be confirmed after all scholarships have been confirmed.

Details of scholarship dates can be found in the Admission section of the School's website or from the Registrar on 01572 820610 or admissions@uppingham.co.uk

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

- 4.2 The Finance Director assesses all applications and parents or guardians may be asked to meet, in their home, with a school representative, 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.

*We are not able to provide indicative assessments until the Registration Form has been completed and returned to the Admissions Office, together with the Registration Fee.

- 4.3 The Finance Director presents a recommendation, in accordance with the School's assessment process, to the Headmaster who makes a joint decision with the Bursar on bursary awards.

Decisions are communicated to parents or guardians in writing by the Finance Director. The School's decisions on all applications are final.

The amount of an award is not influenced by the level of academic ability of the child, but by the extent of financial need.

5. Considerations in the assessment process

Each application is considered on its own merits. It is recognised that judgements about what sacrifices a family should make to pay school fees will be personal. However, the School has a duty both to safeguard its charitable funds and to ensure that any financial support it offers is well focussed and targeted towards those most in need. Therefore, in determining the appropriate level of assistance to be offered, in addition to current earnings, other factors will be considered, including:

- (i) 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, we normally expect them both to be employed and a family's ability to improve its financial position or earning power will be considered.
- (ii) Costs associated with other dependants e.g. sick or disabled parents or children, or contributions to siblings' Uppingham (but not other school) fees
- (iii) Substantial realisable equity in the applicant's home and ownership or interest in other properties or assets
- (iv) In cases of separation, the contribution made by the non-resident parent.
- (v) Contribution made to household costs by other, wider, family members, any adults unrelated to the child or by outside sources.
- (vi) Significant capital savings and investments that could be used for the payment of school fees (only HMRC-approved pension funds are excluded from assessment)
- (vii) Acknowledging that others might have a different view, the School considers that the following would not be consistent with the receipt of a bursary:
 - Significant savings or investments
 - A second property/land holding other than the property in which the relevant child lives
 - Frequent or expensive holidays, new or luxury cars, expensive activities

6. Review of bursary awards

All awards are reviewed at least annually and may be increased or decreased if the financial circumstances of the applicant change significantly.

Current bursary holders will be issued with means-testing forms at the end of March each year for return by the beginning of May. Awards will be confirmed at the beginning of June for the following academic year.

For those in receipt of bursaries, the School 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 or guardians have failed to support the School, for example, by the late payment of any contribution they are making to the fees (see Scholarship, Exhibition or Bursary, Conditions of Award – Appendix 1)

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. Confidentiality and data protection

The School respects the confidentiality of Bursary awards made to families and recipients are expected to do likewise. Please also note that Bursary awards are not revealed to teaching staff.

All the personal data obtained through the completion of the blue form is gathered only for the purposes of processing the application. The data obtained will only be retained for as long as necessary to fulfil the School's legal and contractual obligations. For further information on how the School processes your personal data, please refer to the Privacy Notice posted on the School's website (<http://www.uppingham.co.uk/privacy-and-cookies>).

9. 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

One charitable trust, to which parents can apply directly, is **The Emmott Foundation** (emmottfoundation@btinternet.com) which makes small grants to Sixth Form bursary recipients who experience sudden or unexpected crisis. Grants range from £500 to £1,500 per term, and are subject to a number of limitations:

- (i) The School's bursary must be at least one third of the fees
- (ii) Applicants will normally have high academic standards
- (iii) Grants are not usually made where there is a sibling also in fee-paying education
- (iv) Overseas pupils are excluded
- (v) The circumstances are death, accident, severe illness, divorce, desertion or loss of employment
- (vi) Consideration is also given to major educational, social or pastoral problems

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 overseas trips for the benefit of pupils, for academic, cultural or sporting reasons.

These trips can be prohibitively costly for parents, whether they are in receipt of bursary support or not, and we appreciate that in some cases, the wider family or the pupils themselves (through holiday jobs or savings) may need to help raise the necessary funds.

Whilst all overseas trips are optional, some have a clear educational value and we will try to support pupils on the most significant bursaries to attend such trips.

Applications for support with overseas trip funding should be sent, in the first instance, to the Finance Director.

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.