



# MEANS-TESTED BURSARIES AND SCHOLARSHIPS

The Royal Grammar School

September 2019

## MEANS-TESTED BURSARIES AND SCHOLARSHIPS

### General

1. **Opportunity** The Governors of The Royal Grammar School Worcester (RGSW) wish to ensure that the opportunity for children to benefit from the education offered by the school is not unreasonably restricted by the parents' ability to pay fees. Provision for financial assistance is made within the school's budget and an award made from this provision, known as "a Bursary", may be made in the form of a remission of up to 100% of the tuition fees payable, depending on the financial, compassionate or other pertinent circumstances of applicants. Any Scholarships awarded may be supplemented by Bursary funding up to 100% remission of fees.
2. **Poverty** To ensure that people in genuine poverty are not excluded, as well as covering tuition fees, bursaries may be extended to cover or contribute towards the costs of such additional items as school lunches; uniform; travel costs; examination fees; equipment required for educational, sports or co-curricular activities; and foreign exchange and other educationally important trips.
3. **Limitations** The Governors intend that the School provides the best possible education, consistent with affordability, but unlike many independent schools there are no endowment funds available to provide additional financial support. Bursaries therefore must be provided out of fee income and it is regretted that funds available for the above awards are limited such that the Governors are seldom able to meet the full demand. It is unlikely that awards will be available to families with an income exceeding that stated in paragraph 10a below.
4. **Promulgation** The School provides information on the existence and accessibility of potential bursary awards as follows:
  - a The School website.
  - b The School prospectus.
  - c The local press by means of advertisements.
  - d The trustees annual report.
5. **Means Testing** Bursary awards are subject to repeat testing of parental means each year and may be varied upwards or downwards, depending on parental circumstances. Awards are made on the basis of the confidential RGSW scale of awards, which sets out award levels in relation to a family's financial circumstances. The scale of award is reviewed and revised annually by the bursar to reflect any changes in fee costs. Though awards are generally tied to this scale, they may be varied upwards or downwards depending on individual parents'/guardians' circumstances (e.g. their savings, investments and realisable assets as well as their income, the size of their family, any other persons dependent upon them and like factors), compassionate or other pertinent considerations.
6. **Priorities** Priority will normally be given to children entering the Senior School. Bursary awards for children entering RGS The Grange or RGS Springfield will only normally be considered in exceptional circumstances. Requests for financial support usually fall into two categories:
  - a. New applicants to the School where a place has been offered but parents/guardians are unable to fund the tuition fees.
  - b. Existing pupils 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.

## The Case for Assistance

7. A number of factors will be considered 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.
8. **Suitability** In assessing a child's suitability, attention will be given to their academic assessment, but potential will also be considered as well as actual achievement. Each applicant must meet the School's normal academic requirements and any pupil to whom support is offered must, in the opinion of the Head, be likely to make sound academic progress following admission and possess the potential to develop the quality of his or her work. A considerable degree of commitment and effort will be required and a good record of effort and behaviour in previous schools will be essential. Since RGSW is a school of high academic standards it will normally follow that those achieving the highest results in the entrance examination will be deemed most suitable. Consideration will also be given to how a pupil might benefit from participation in the wider, co-curricular activities on offer at the School. However, any constraints on earlier achievement, such as illness or lack of opportunity, will also be considered.
9. **Financial Limitations** Although the priority in making an award will be suitability, the amount will be based on financial need. Parents/Guardians must be clear that achieving the normal academic requirements alone will not guarantee bursary support, as already mentioned, funds are limited and experience shows that demand surpasses the available funds every year. However, each case will be assessed on its own merits and awards made accordingly, subject to the available funding and the level of demand. It is recognised that judgements about what sacrifices a family should make to pay school fees will be personal and the scale of awards is therefore not rigid. However, the School has a duty to ensure that all bursary grants are well focussed and so, as well as current earnings, other factors which will be considered in determining the necessary level of grant will include:
  - a. 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.
  - b. Opportunities to release any capital. Significant capital savings and investments would be expected to be used for the payment of school fees, as would equity values in houses.
  - c. In cases of separation, the contribution made by the absent parent.
  - d. Contribution to household costs by other, wider, family members, any adults unrelated to the child or by outside sources.
  - e. Where fees are being paid to other schools or universities.
10. **Possible preclusions** The award of a Bursary is specifically to allow a child whose parents may not otherwise be able to afford tuition fees to benefit from a place in the School. The award is intended for those with no financial choice and who otherwise could not afford the tuition fees; it is not intended to facilitate other options or support a pre-existing lifestyle. The Governors therefore consider that the following would not be consistent with the award of a bursary:
  - a. Household income in excess of £50,000
  - b. Substantial savings or investments
  - c. Mortgages on excessively expensive properties
  - d. Substantial equity in homes
  - e. Frequent or expensive holidays

- f. New or luxury cars
- g. Investment in significant home improvements
- h. A second property or land holdings
- i. A directorship or shareholding or equitable interest of a business with substantial profits

11. **Other Factors.** It is recognised that, in addition to academic ability and financial constraints, there may be other circumstances which should be considered. These include:

- a. Where a child has siblings at the School.
- b. Where the social needs of the child are relevant.
- c. Where a parent/guardian is terminally ill or is unable to secure permanent employment due to poor health.
- d. Where a separation has resulted in the child having to be withdrawn from the School adding to the stress of coping with the Parents/Guardians separating.

12. **Existing Pupils - Change in Family Circumstances** Within overall budget funding, the School will, in normal circumstances, make provision to support cases of hardship, for cases of sudden and unforeseen need. Parents/Guardians with a child at the School whose financial circumstances suddenly change may apply to the Director of Finance & Operations (DFO) for assistance explaining their situation and completing a Bursary Application Form, which is available from the Bursary or Registrar.

Such awards are subject to the availability of funding and cannot be guaranteed. Furthermore, the Governors do expect parents to make reasonable arrangements to effect insurance cover, particularly through the critical stages of their child's education.

13. **Annual Review** All Bursary awards are subject to repeat testing of parental means each year and may be varied upwards or downwards depending on parental circumstances. Current bursary holders will be issued with repeat means-testing forms early in the Trinity Term each year. Failure to complete and return the forms by the due date may lead to the loss of the Bursary award. An award may be reduced or withdrawn:-

- a. if a pupil's progress, attitude or behaviour has been unsatisfactory
- b. where parents are failing to support their child at the school
- c. if parents fail to support the school in educating their child
- d. failure to make full or timely payment of the contribution to fees due by parents
- e. misrepresentation on the application form or annual return

14. **The Application Process** Bursaries may be made available to Parents/Guardians of children entering any year group of the school, including the Prep schools. Application must be made prior to the Entrance Examination or assessment. They are awarded at the discretion of the Governors. The school Head and DFO are responsible for the management and coordination of the process. An award is only made to the end of the child's education in the School in which it is offered, such that an award made in a Prep school will not automatically carry over to the Senior School.

Step One. Prior to the Entrance Examination Parents/Guardians seeking a Bursary are required to complete an application form, which seeks to establish the financial circumstances of the household. The form, which requests details of income and capital, can be requested from the Registrar or Bursary and must be accompanied by full documentary evidence. The completed forms, together with the necessary documentary evidence, are to be submitted to the DFO no later than one week prior to the Entrance Examination date.

Step Two. The Bursar assesses all applications to establish the overall demand for support and assess the likely level of support required for each applicant. This may involve the DFO, or his representative, visiting the Parents/Guardians' home to ensure the information has been correctly interpreted and the basis of the financial assessment has been fair.

Step Three. Following the Entrance Examination, the Head will provide to the DFO a prioritised list of applicants meriting an award.

Step Four. The DFO will work down the list in order of priority and will make offers of bursaries to parents/guardians until the budgeted funds are fully allocated. If a home visit is deemed appropriate but has not been possible prior to the offer, such offers may be provisional upon such a visit. All offers will be dependent upon the verification of the information given in the application form.

Step Five. Parents/Guardians are then required to sign a letter accepting the place at the school and an acknowledgement agreeing to any conditions relating to the Bursary.

Step Six. If any offers of Bursary awards are rejected prior to the closing date, the funds will be re-allocated to other parents.

15. **Confidentiality** The School respects the confidentiality of Bursary awards made to families and recipients are expected to do likewise.
  
16. **Other Sources of Bursary Assistance** In addition to the School funding Bursaries, there are a few educational and charitable trusts which provide assistance with tuition fees. In the majority of cases, such assistance is restricted to children who are already attending a fee-paying school and due to a change of circumstances may be unable to remain. Grants are often restricted to allowing a child only to complete a current key stage of education such as GCSE or A Level courses. Parents/Guardians might wish 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 Grants Advice Service of ISC, administered by the Joint Educational Trust, who should be contacted before approaching individual charities. It is often possible for the adviser to direct enquirers to charities that are not members of the Educational Trusts Forum.

Educational Grants Advice  
Independent Schools Council  
c/o Royal National Children's Foundation  
Sandy Lane  
Cobham  
Surrey  
KT11 2ES  
Tel 01932 865619

## 17. Scholarships

### General Terms and Conditions

All Scholarships are awarded at the absolute discretion of the School. Scholarships are awarded to all recipients based on their performance on the relevant Scholarship Day plus the Academic Scholarship Examination.

- a. Academic Scholarships are awarded based on academic achievement in the Entrance Examination. Those pupils sitting the 11+ examination who are considered potential Scholars are invited back after the written examination for some extension work with Heads of Department and the Head of Enrichment.
- b. Sixth Form Scholarship applicants sit a specialist examination in their chosen subject, which must be studied to A Level if awarded.
- c. Sport, Art, Music, Drama, Design & Technology and Textiles are all assessed by specialist audition, assessment or assignment plus performance in the academic examination.
- d. Scholarships are awarded for the benefit of individual pupils to encourage excellence across a range of academic and co-curricular activities in keeping with the aims of the school.
- e. The monetary value of Scholarship awards may vary according to the level of competition and/or the quality of the applicants.
- f. All 11+ and 13+ candidates will automatically be considered for Academic Scholarships but there are separate assessment processes for all other types of Scholarship, including 16+ Academic Scholarships.
- g. In the event of there being no outstanding candidates in a particular category, funds may be allocated to another category of award or not awarded for that academic year.
- h. Scholarship awards are made without regard to parental income and are usually expressed as a percentage fee remission per year. A number of Exhibitions are also awarded which have a fixed value.
- i. All Scholarships may be supplemented by Bursary funding up to 100% remission of fees.
- j. All non-academic Scholarship candidates will also be required to perform satisfactorily in the relevant academic Entrance Examination.
- k. Pupils awarded Scholarships will retain them throughout their careers at RGS Worcester subject to good performance in all aspects of school life. Performance will be assessed at least annually and parents will be notified if there is any danger of the award being withdrawn. One term's notice of the withdrawal of an award will always be given.
- l. Because RGS is investing heavily in their education, all Scholars are expected to show leadership and loyalty to the School. School practices, rehearsals, events and fixtures must therefore be prioritised over external events or club matches.
- m. Awards are made on the understanding that a child will spend his or her entire Senior School career at RGS and he/she will leave at the end of the Upper Sixth year. If, without

agreement, a Scholar is withdrawn by his/her parents from RGS to attend another school, RGS will be entitled to recover the total fee remission which has been received during the child's whole RGS career.

- n. Awards are made on the condition that pupils understand their obligations to the school and that parents support the school. On accepting a Scholarship, parents are required explicitly to state that they accept these Terms and Conditions.

- 18. **Board Approval** The Board of Governors approves the expenditure levels annually for Bursaries and Scholarships. The Heads and DFO provide an annual report for Board approval in the Lent term.

Sponsor : Director of Finance and Operations

Reviewed and Endorsed : December 2012 (to include Means Tested Bursaries procedures), August 2013, September 2014, September 2015, September 2016, October 2018 and September 2019.