



Policy Title: **Foundation Bursaries**

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Point of Contact (Reviewer): **Chief Operating Officer**

LOUGHBOROUGH SCHOOLS FOUNDATION

FOUNDATION BURSARIES

1.0 General

- 1.1 The Governors of the Loughborough Schools Foundation are committed to broadening access to the schools by offering to eligible parents/guardians means-tested financial support towards the payment of school fees. Such support is under the terms of the Articles of Association known as Foundation Bursaries and may be awarded in the form of a discount of up to 100% of the tuition fees payable, depending upon the financial, compassionate or other pertinent circumstances of the applicants.
- 1.2 Foundation Bursaries are subject to the testing of parental means each year and may, in compelling circumstances, be varied. Awards are made on the basis of the Loughborough Schools Foundation Scale of Awards, which sets out the recommended level of award in relation to a family's financial circumstances. The Scale of Awards is reviewed and revised annually, to reflect any changes in tuition fees, and is approved by the governors. Although awards are generally linked to this scale, they may be varied depending upon individual parents/guardians' circumstances, including their savings, investments, realizable assets, income, size of the family, dependent relatives, and any compassionate or other pertinent considerations.
- 1.3 Requests for financial support toward the tuition fees normally fall into one of two categories:
- New applicants to the Grammar School and High School where a place has been offered but parents/guardians are unable to fund the tuition fees. The awards made under this category are known as **School Assisted Places (SAPs)**. This category applies almost exclusively to pupils entering the Grammar and High Schools in Year 7, however in exceptional cases pupils joining in different year groups may be considered. The decision whether to progress an application through the 'Application Process' is absolutely at the discretion of the relevant Head. Potential pupils whose applications are not progressed do not have the right of appeal. The Head's decision is final.
 - Existing pupils in any of the Foundation's schools (excluding the Nursery), where a change in the circumstances of the parents/guardians has resulted in difficulty in meeting the tuition fees and may result in a pupil being withdrawn part way through a critical stage of education. The awards made under this category are known as **Hardship Bursaries**.

- 1.4 In addition to the means tested financial support, schools within the Foundation may award **Scholarships**; scholarships are an honorary award only and do not attract any form of financial support.
- 1.5 [Music Scholarships](#) are available at Year 7, Year 9 and Year 12. We welcome applications from both internal and external candidates; an offer of a scholarship is conditional on gaining entry to one of the Foundation's school. Music Scholars benefit from free individual music tuition on principal and second study as well as tailored support. The Foundation reserves the right to vary this sum on a year by year basis.
- 1.6 Loughborough Amherst School Hardship Bursaries and SAPs are funded in part by the Sisters of Providence (Rosmini), and a separate Awards Committee considers applications for assistance for pupils attending Loughborough Amherst School. The principles and processes for this committee are consistent with those which apply to the other three schools, and are set out in a separate policy ([here](#) – to insert link once available).
- 1.7 Bursary awards, regardless of type or amount are **not transferable** between schools. Should an existing pupil in receipt of bursary support wish to transfer to another school within the Foundation, then they must make a new application to the relevant (new) school.

2.0 New Applicants to the Schools

The Application Process

- 2.1 SAPs are made available to the parents/guardians of children entering Loughborough Grammar School, Loughborough High School. For pupils wishing to enter Loughborough Amherst School SAPs are also available under the process set out in the policy governing financial assistance at Loughborough Amherst ([link](#)). SAPs are not ordinarily available for pupils at Fairfield Preparatory School. These awards are made at the discretion of the relevant Head. The relevant Head and the Chief Operating Officer are responsible for the management and co-ordination of the process. The normal process is as follows:

Step 1. Parents/Guardians seeking a SAP are required to complete an application form, which seeks to establish the financial circumstances of the family and household. The form, which requests detail of income and capital, and which must be accompanied by full documentary evidence, can be obtained from the relevant School or the Bursary. The completed forms, together with the necessary documentary evidence, are to be submitted to the relevant school no later than the date of the entrance examination in any year for the awards to start in the following September.

Note. *It is at the discretion of the relevant Head whether applications are accepted to step 1.*

Step 2. On completion of step 1, the Foundation's finance staff assess all applications in order to establish the likely level of support, which will be required in order to allow a child to attend one of the schools. This process may involve the Chief Operating Officer, or his representative, visiting the parents/guardian's home to ensure that the information has been correctly interpreted and that the basis of the financial assessment has been fair.

Step 3. The finance staff will prepare a recommendation in accordance with the Scale of Awards. The recommendation is made to the relevant Head, who then makes the final decision. The financial assessment takes account of a number of factors including income, savings and assets and only applicants who have evidenced that they are prepared to make significant lifestyle choices to accommodate fees are likely to be successful.

Step 4. The parents/guardians are advised by the relevant Head whether their child is to be offered a place at the school and of the amount of the SAP being offered.

Step 5. Parents/Guardians are required to sign a letter accepting the place at the school and acknowledging the conditions relating to the provision of the SAP. The Head's decision is final and there is no right of appeal.

3.0 The Case for Financial Assistance

3.1 The relevant Head, the Chief Operating Officer and the Bursary Committee or Awards Committee will consider a number of factors when making a judgment as to the justification for support, and the extent of such support. In the main, a child's suitability for the school in question is the first consideration in granting support.

- **Suitability.** In assessing a child's suitability, attention will be given to the academic results of each applicant but potential will also be considered as well as achievement. Foundation Bursary funds are limited and those judged most suitable will be given priority as those who are likely to gain most from the educational opportunities. In addition to academic potential consideration may be given to the pupil's academic ability as well as any specific talent in music, drama or sport which would benefit from the opportunities available at the school. Each pupil to whom support is offered must, in the opinion of the relevant Head, be likely to make sound academic progress following admission, must possess the potential to develop the quality of his or her work, and benefit from participation in the extra-curricular activities on offer at the appropriate school. Previous school reports will be consulted for evidence of good behaviour.
- **Financial Limitation.** The amount of the Foundation Bursary award is influenced by the extent of financial need. Each case is assessed on its own merits and awards are made accordingly, subject to the Foundation's ability to fund the awards. It is recognised that judgments about what sacrifices a family should make in order to pay school tuition fees will be personal. However, the schools have a duty to ensure that all Foundation Bursary awards reflect all of the circumstances, which are relevant.

- **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:
 - Where a child has a sibling or siblings at the school.
 - Where the social needs of the child are relevant.
 - Where a parent/guardian is terminally ill or is unable to secure permanent employment due to ill health.
 - Where a separation has resulted in the child having to be withdrawn from the school adding to the stress of coping with parents/guardians separating.

4.0 Existing Pupils: Change in Family Circumstances:

- 4.1 Within the overall budgetary constraints, the schools in normal circumstances have funds available for cases of sudden, unforeseen need or where applications meriting Hardship Bursary assistance are received out of the normal cycle. Parents/guardians with a child at a school, whose financial circumstances suddenly change may contact the relevant Head or Chief Operating Officer, to explain their situation and apply for an award. The process which is followed is very similar to that described at paragraph 2, less the requirement to submit applications prior to the entrance examinations – applications of this nature can be made at any juncture.

The Application Process

- 4.2 Hardship Bursary awards are made available to the parents/guardians of children already attending one of the four schools. The relevant Head, the Chief Operating Officer and the Bursary Committee are responsible for the management and co-ordination of the process. The normal process is as follows:

Step 1. Parents/Guardians seeking a Hardship Bursary Award are required to complete an application form, which seeks to establish the financial circumstances of the household. The form, which requests detail of income and capital, and which must be accompanied by full documentary evidence, can be obtained from the relevant School or the Bursary. The completed forms, together with the necessary documentary evidence, can be submitted to the relevant school at any point in the academic year.

Note. *It is at the discretion of the relevant Head whether applications are accepted to step 2.*

Step 2. On completion of step 1, the Foundation's finance staff assess all applications in order to establish the likely level of support, which will be required in order to allow a child to attend one of the schools. This process may involve the Chief Operating Officer, or his representative, visiting the parents/guardian's home to ensure that the information has been correctly interpreted and that the basis of the financial assessment has been fair.

Step 3. The finance staff will prepare a recommendation in accordance with the Scale of Awards. For pupils attending Fairfield Preparatory School, Loughborough Grammar School or Loughborough High School the recommendation is made to the Bursary Committee, which takes the decision. For pupils at Loughborough Amherst School the recommendation is made to the Loughborough Amherst School Awards Committee.

The Bursary Committee and the Awards Committee both meet once in each academic term to consider the cases presented to them.

Step 4. The parents/guardians are advised by the Chief Operating Officer, or his representative, whether a Hardship Bursary has been granted and the amount of the award.

Step 5. Parents/Guardians are required to sign a letter acknowledging and accepting the conditions relating to the provision of the Hardship Bursary. The Bursary Committees' and the Awards Committees' decisions are final and there is no mechanism for appeal.

5.0 Annual Review:

5.1 All Foundation Bursary awards, regardless of the circumstances which have justified them, are subject to a review of the parental means each year and may be varied depending on the parental circumstances. Current SAP holders will be issued with repeat means-testing forms each year and these forms should be completed by the 1st June in the year in question. Consideration will be given to any change in family or financial circumstance, and may also include factors such as the academic progress and contribution to the school community of the child.

5.2 For those previously in receipt of a Hardship Bursary, the Bursary Committee has the discretion to reduce or withdraw an award not only where a pupil's progress, attitude or behaviour have been unsatisfactory, but also where the parents/guardians have failed to support the school, for example by the late payment of any contribution they make towards the tuition fees or where the family or financial circumstances have changed.

6.0 Confidentiality

6.1 The schools respect the confidentiality of all Foundation Bursary awards made to families. Recipients of these awards are expected to do likewise.