



## Ludgrove School Trust Limited

### Means-tested Bursary Policy

#### Introduction

The Governors of Ludgrove are committed to broadening access to the School by offering to eligible parents/guardians means-tested financial support with the payment of school fees in so far as it is appropriate within the context of the school's overall finances.

Such support is known as a Bursary and Bursaries may be awarded in the form of a discount of up to 100 per cent on tuition fees payable plus some additional costs associated with attending Ludgrove, if appropriate, depending on the financial circumstances of applicants.

Bursaries are subject to annual testing/review of financial means and may, as a result, be varied upwards or downwards, depending on the circumstances of parents/guardians. They may also be removed entirely where appropriate. Any change will, except in exceptional circumstances, take effect from the beginning of the next academic year.

Requests for financial support fall into two categories:

- New applicants to the School where parents/guardians are unable to fund the tuition fees.
- Existing pupils where a change in parents'/guardians' circumstances has resulted in inability to meet tuition fees which would therefore otherwise result in the boy being withdrawn part way through this stage of education.

Information on means-tested financial support with the payment of school fees is available from:

- The School's website
- The admissions departments of a number of public schools
- Advertisements in the press
- The Educational Trusts Forum: website: [www.educational-grants.org](http://www.educational-grants.org)
- The Royal National Children's Springboard Foundation: website: [www.royalspringboard.org.uk](http://www.royalspringboard.org.uk)

#### New Applicants to the School

##### The Application Process

Bursaries may be made available to parents/guardians of boys seeking to enter any year group of Ludgrove. They are awarded at the discretion of the Headmaster (to be exercised in accordance with the matters set out in this policy) and funded from a bursary reserve agreed by the Governors. The Headmaster and the Bursar are also responsible for the management and coordination of the process.

- Step one - 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, may be obtained from the Bursar and must be accompanied by full documentary evidence. The completed form, together with the necessary documentary evidence, should be submitted to the Bursar no later than 31<sup>st</sup> October each year for Bursaries to start the following September.

In addition, Ludgrove requires that the candidate's school reports and any other relevant paperwork pertaining to their academic or other achievements be supplied to the school. Boys seeking admission into year 5 or above will also be required to sit the School's academic assessment tests.

- Step two - the Bursar assesses all applications in order to establish the likely level of support which will be required in order to allow the boy to attend the School. This will involve the Bursar, or their representative, visiting the parents'/guardians' home to ensure the information has been correctly interpreted and the basis of the financial assessment has been fair. Please see further information contained in this policy.
- Step three – in the event that a boy and his parents/guardians have not visited the school and met with the Headmaster prior to initiating this process, an appointment to do should be made with the registrar prior to a decision on the award being made by the School.
- Step four - the Bursar prepares a recommendation which is considered by the Headmaster. The decision to award bursarial support resides with the Headmaster. The Social Impact Committee maintains an overview and monitors Bursary provision annually. The Social Impact Committee, which reports to the Board of Governors, comprises the Bursar and no less than two Governors and meets at least annually.
- Step five – by the end of the Michaelmas term in the calendar year before the September in which the boy hopes to start at the School, the parents/guardians are advised whether their son/ward is to be offered a place at the School and of the Bursary offer.
- Step six - 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 no later than the first day of the Easter term preceding the September for which the boy has been offered a place at the school. [These conditions include the right to termination and/or recover of any Bursary funding which has been awarded on the basis of the provision of false information].
- Exceptionally, at the discretion of the Headmaster and subject to there being any remaining available Bursary funds, an application for a Bursary for a new applicant to the School may be considered when made outside the timeframe indicated above.

### **The Case for Assistance**

The Headmaster and Bursar will consider a number of factors when making the judgment as to the justification for support and the extent of such support. However a Bursary will not be offered unless (i) the relevant boy is considered likely to benefit from and contribute to life at Ludgrove; and (ii) without a Bursary his parents/guardians could not afford to send him to Ludgrove.

- Suitability for Ludgrove - in assessing a boy's suitability for life at Ludgrove, attention will be given to the academic assessment result or, for boys seeking entry into year 4, previous school reports but potential will also be considered. Bursary funds are limited, and those judged most likely to gain most from the overall educational provision will be given priority. Each pupil to whom support is offered must, in the opinion of the Headmaster, be likely to make sound academic progress and possess the potential to develop the quality of his work and benefit from participation in the wider, extra-curricular activities on offer at the School. Previous school reports and references will be consulted for evidence of good behaviour as well as academic and other achievements.
- Other factors – where it is considered that the above threshold is met, it is recognised that there may be other circumstances which should be considered in determining whether a boy is potentially deserving of a Bursary. These include:
  - Where a boy has a sibling at the school.

- Where the social needs of the boy are relevant (e.g. he may be suffering from bullying in his present school)
- Where there are other particular reasons why being at Ludgrove would be of special benefit to the boy
- Financial limitations- if a boy is considered suitable for a Bursary the amount of any such Bursary is not influenced by the level of the academic ability of the boy but is determined solely by the extent of need. As far as possible, each case is assessed on its own merits and awards are made accordingly, but always subject to the funds available for Bursaries. It is recognised that different views may reasonably be held about what sacrifices a family should be expected to make before they can be said to need help paying school fees in whole or in part. However, the School has a duty to ensure that all Bursaries are well focused and with that in mind the Governors have determined that, as well as current earnings, other factors which will be considered in determining the necessary level of grant will 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 or the requirements of their partner's work.
  - Opportunities to release any capital. Significant capital savings or investments would be expected to be used for the payment of school fees as would equity values in houses where the cost of releasing any such equity value is affordable.
  - In cases of separation, the contribution made by the absent parent.
  - Contribution to household costs by other, wider, family members, any adults unrelated to the boy or by outside sources.
  - Where fees are being paid to other schools (or universities) the School's grant will take into account all these outgoings.
  - Any support from a third party (including in the form of grants from trusts or other bodies) will be taken into account in calculating the level of our support.
- Acknowledging that others might have a different view, 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/land holdings.

### **The Home Visit**

A formal visit will be made to the family homes of all applicants for Bursary assistance before any offer of financial support can be made. There are several reasons for this policy:

- It is an opportunity to discuss all the various papers relating to an application for financial support in informal and relaxed surroundings so that parents/guardians understand the system thoroughly and the information provided can be better assessed in context.
- To make sure that parents or guardians understand how the means testing system works. Every school is different and, at Ludgrove, we want all parents/guardians to understand exactly what contributions they may be required to make on top of their son's/ward's Bursary and the limitations to any potential financial support can be explained.

There is no need for a prospective pupil to become involved in the visit.

### **Existing Pupils - Change in Family Circumstances**

In addition to applications for Bursaries from prospective new parents, the School will consider applications for Bursaries from existing parents/guardians in case of sudden, unforeseen need of assistance in meeting the School fees. Where such an application is made, the parents/guardian will be required to complete the application form referred to above and a home visit (of the sort referred to above) may also be required. The decision whether to provide such assistance and the amount thereof will be taken by the Headmaster, taking account of the matters set out in this policy and the boy's Ludgrove career to date, the stage of his Ludgrove career, the welfare of the boy and the circumstances in which the application comes to be made. The financial considerations set out above will be taken into account in this context too. Such awards are always subject to the availability of funding and cannot be guaranteed.

### **Annual Review**

All Bursary awards are subject to annual testing/review of parental means and may be varied upwards or downwards depending on parental circumstances. Current Bursary holders will be issued with repeat means-testing forms at the beginning of October each year for return by the end of the month. For those previously in receipt of Bursaries, the Headmaster and Bursar, in making their report to the Social Impact Committee, have the discretion to recommend to the governors the reduction or withdrawal of 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.

### **Confidentiality**

The School respects the confidentiality of Bursary awards made to families. The process of allocating financial support will be entirely confidential - known only by the Headmaster, the Bursar and the Social Impact Committee (where appropriate on an anonymised basis). The wider teaching staff does not know which pupils receive Bursaries. Recipients are also expected to respect the confidentiality of the Bursaries. Failure to maintain confidentiality could result in the bursary being withdrawn.

### **Other Sources of Bursary Assistance**

In addition to the School's Bursary fund, there are a number of educational and charitable trusts which provide assistance with tuition fees. In the majority of cases, these are to assist children who are already attending a fee-paying school and due to a change of circumstances may be unable to remain. Ludgrove encourages parents/guardians to apply for support where it is felt a good case can be made for assistance. A refusal to apply for such support may be taken into account in considering whether to award a Bursary.

Further information on how to pursue such assistance may be obtained from:

The Bursar  
Ludgrove  
Wokingham  
Berkshire  
RG40 3AB

Email: [maura.brittain@ludgroveschool.co.uk](mailto:maura.brittain@ludgroveschool.co.uk)

Social Impact Committee  
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