
RUPERT HOUSE SCHOOL



FEE ASSISTANCE POLICY

Approved by Board of Governors – 23 March 2020

Introduction

The Board of Governors believes that the best learning happens in academic environments full of diverse beliefs, pursuits and backgrounds, and learning in such an environment prepares children for their next schools and life beyond. It is also committed to making the School affordable and convenient for families in Henley seeking the benefits of a private education.

In delivering these objectives, the School offers a programme of fee assistance:

1. **Sibling discounts** are offered to families for their second and subsequent children.
2. **Bursaries** are means-tested financial support offered to pupils who meet and maintain the normal selection criteria.
3. **Pioneer discount.** Lower fees are offered to pupils entering a year group where there are no or very few pupils of the same gender and their experience will be inferior to that of pupils of the other gender. Currently, the Board has assessed that the initial boys entering Years 3-6 as the School moves to become fully co-educational will not have the same experience as the girls' in certain areas which will be reflected temporarily in a reduced level of fees. Boys in Years 3-6 will be subject to the normal fee schedule once their experience and opportunities are equivalent to those of girls.
4. **Advance Payment** of fees whereby more than one term's fees can be paid in advance.

Rules and Guidelines

Awards are subject to the following general rules and guidance:

- The availability of fee assistance is publicised in the School prospectus, the School's schedule of fees, the School's website and via social media and advertisements in the local press.
- Parents need to apply for all awards except for sibling discounts which are automatically applied.

All awards are subject to normal selection criteria for entry to Rupert House School.

- Pupils may receive more than one award. In the event of multiple awards, sibling discount would be applied first, then pioneer discount and lastly bursary. The amount of any bursary will take account of the financial value of other awards.
- Awards may be reduced or cancelled should performance fall below the required standard, conditions of the award are breached or in the event of poor behaviour.

- If notice is given to withdraw a pupil from the School before the end of Year 6, sibling discount and pioneer discount will be withdrawn and full fees will be charged for the duration of the notice period.
- Eligibility criteria for Bursaries are subject to repeat testing, normally annually or in the event that parental/guardian circumstances change.
- The school reserves the right to withdraw any award in the event of late or non-payment of school fees, in accordance with the School's standard payment terms and conditions.
- All awards are subject to annual review and approval by Governors.

Sibling Discount

Sibling discounts are automatically offered to families who accept the offer of a place for their second and subsequent children. Discounts apply to the fees of the second and subsequent children. Full fees are payable for the first child.

Discounts apply to pupils in all years of the School.

Discounts will be calculated on a pro-rata basis for any pupil attending on a part-time basis. For example, a child attending five mornings a week would be eligible for 50% of the applicable discount.

The value of sibling discounts is recommended by the Finance and Operations Committee for approval by the Board of Governors. They are documented in the schedule of fees sent to parents each year and published on the School website.

Bursaries

Bursaries are means-tested financial support up to 100% of tuition fees offered to pupils who meet and maintain the normal selection criteria. Awards are made at the discretion of Governors. Applications should be made to the Bursar who is responsible for the management and coordination of the process.

Means testing is undertaken by Bursary Administration Limited, a specialist firm widely employed by local schools.

Awards are subject to repeat testing of parental means each year and may be varied upwards or downwards, depending on parental circumstances.

Requests for financial support usually fall into two categories:

- New applicants to the school where a place has been offered but parents/guardians are unable to fund the tuition fees.
- 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.

Bursaries are reviewed annually in the Spring Term:

1. Applications for existing and new pupils must be received by the end of the Autumn Term for bursaries for the next academic year (i.e. September the following year). A completed application form which seeks to establish the financial circumstances of the household must be submitted to the Bursar. The form (available from the Bursar) requests details of income and capital and it must be accompanied by full documentary evidence and returned to the Bursar by the end of January.
2. The Bursar assesses all applications in order to establish the likely level of support which will be required to enable the child to attend the school. This may involve the Bursar, or Bursary Administration Limited, visiting the parents'/guardians' home to ensure the information has been correctly interpreted and the basis of the financial assessment has been fair.
3. The Bursar prepares a recommendation which is considered by the Head and a joint recommendation is then made to the Finance and Operations Committee for approval. The recommendation will be based upon the benefit to the pupil of attending the School and the contribution the pupil will or is likely to make to the School. Bursary funds are limited and those judged most suitable will be given priority.
4. Decisions of the Finance and Operations Committee are notified to the Board of Governors. All decisions made by the Finance and Operations Committee are final and there is no right of appeal.
5. Parents/guardians are advised whether their child is to be offered a bursary offer by the end of March.
6. 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 by the end of April.

The Case for Assistance

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.

- Suitability - in assessing a child's suitability, attention will be given to the academic assessment result of each applicant but potential will also be considered as well as

actual achievement. Each pupil to whom support is offered must, in the opinion of the Head

- Be likely to make good academic progress following admission;
- Possess the potential to develop the quality of his/her work; and
- Participate in the wider, extra-curricular activities on offer at the school and contribute fully to the School.

In normal circumstances, each applicant should meet the school's normal academic requirements. Previous schools may be consulted for evidence of good behaviour. Bursary funds are limited and those judged most suitable will be given priority as those likely to gain most from a Rupert House education.

- Financial limitations - the amount of the bursary award is not influenced by the level of the academic ability of the child but by the extent of need. Each case is assessed on its own merits and awards are made accordingly subject to the School's ability to fund these within the context of what is viable within its overall budget. The School has a duty to ensure that all bursary grants are well focused and so, 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 parents, 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 and investments would be expected to be used for the payment of school fees as would equity values in houses.
 - 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 child or by outside sources.
 - Where fees are being paid to other schools (or universities) the School's award will take into account all these outgoings.
 - 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 financial value of other financial assistance awards. Ordinarily the size of a bursary would be reduced by the value of other awards.
- 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 siblings at the school.
 - Where the social needs of the child are relevant (e.g. may be suffering from bullying at their present school).
 - Where a parent/guardian is terminally ill or is unable to secure permanent employment due to poor health.
 - 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.

Existing Pupils - Change in Family Circumstances

Bursaries may be awarded outside of this annual process, but only on rare occasions and usually for existing pupils where unforeseen or exceptional circumstances have resulted in a family becoming unable to meet that year's fees.

Subject to budgetary constraints, the School will in normal circumstances set aside funds for cases of sudden, unforeseen need or where applications meriting bursary assistance are received out of the normal calendar cycle for bursary submission, scrutiny and award.

Parents/guardians with a child at the school whose financial circumstances suddenly change may apply for a bursary to the Bursar, explaining their situation and using the forms at Annex A. Such awards are subject to the availability of funding and cannot be guaranteed.

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 at the end of the Autumn Term each year for return by the end of January.

The Head and Bursar, in making their recommendation to the Finance and Operations 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 fees.

Decisions of the Finance and Operations Committee are notified to the Board of Governors. All decisions made by the Finance and Operations Committee are final and there is no right of appeal.

Parents/guardians are advised of the result of the review by the end of March.

Confidentiality

The School respects the confidentiality of an individual family's declared financial circumstances and of any subsequent bursary awards. Many parents make considerable sacrifices to send their children to Rupert House and all recipients of any award are expected to maintain this confidentiality.

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. Rupert House 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 Bursar or from the following organisations:

- The Educational Trusts Forum - Website: www.educational-grants.org
- The Royal National Children's Foundation - Website: www.rncf.org.uk

Pioneer Discount

Lower fees are offered to pupils entering a year group where there are no or very few pupils of the same gender and, in the opinion of the Board, their experience will be inferior to that of pupils of the other gender. As the School moves to become fully co-educational, the Board has assessed that the experience of the first boys entering Years 3-6 will initially not be the same as the girls in certain areas which will be reflected temporarily in a reduced level of fees.

Lower fees will be offered to the initial boys entering Years 3-6 in the academic years starting September 2019 and 2020.

The School is implementing a plan to bring the standard of experience for boys up to the same level as girls. Boys in Years 3-6 will be subject to the normal fee schedule once the plan has been implemented which is currently scheduled for the end of the 2020/21 academic year.

Advance Fee Payments

This scheme is designed to enable families to make an Advance Payment of school fees for a named child at current fee rates, thereby locking in the future cost of education of their child and protecting themselves against future increases in fees.

The Advance Payment scheme provides the facility for parents to pay more than one term's fees in advance up to the full amount of fees payable until the end of Year 6. All future periods will be charged at the current prevailing rate. This means that any payments made before the beginning of the summer term will be at the that year's rates and payments thereafter will be at the following year's rates. Parents will not be liable for increases in fees over the period covered by the Advance Payment.

Parents may wish to take financial or legal advice before making an Advance Payment. No statement made by or on behalf of the School shall be, or be treated as, financial or investment advice. It is presumed that the Advance Payment shall be used for the termly payment of the agreed amount of school tuition fees for the named child.

The Advance Payment shall belong to and form part of the general funds of the School but is subject to the provisions for refund (below). Interest shall not accrue or be paid.

The pupil's account will be credited term by term with payment of the fixed amount of termly fees that are covered by the Advance Payment, as they fall due for payment.

If you wish to withdraw your child from the School (other than at the normal leaving date at the end of Year 6), the unused amount of the original Advance Payment will be refunded to the Payer within twelve months of the date on which written notice is received by the School of cancellation of the child's entry or withdrawal by a parent or the child is refused admission or is withdrawn, removed or expelled. Any refund shall be subject to a reasonable administration charge.

Any unpaid extras, damage, payable increases and other sums owed in respect of the pupil will be deducted from sums to be refunded.

The value of any scholarship, bursary or other discount awarded before the date of this scheme will be allowed. In the case of an award after the Advance Payment has been made there will be a termly refund to the payer as part of the termly bill. The Advance Payment will not cover any items normally charged to a pupil's account as an extra or administration or interest charges, or charges for damage or, where applicable, the registration fee and confirmation of entry deposit.

A payer who is not also a parent shall not acquire any rights or obligations under the terms of the School's contract with the parent save as provided in these scheme conditions.

The amount of the fees covered each term may be adjusted, at the discretion of the School and in accordance with charity law (where applicable) so as to restore the value of the Advance Payment to the School if, in the future, any tax or duty is imposed or any tax benefit or allowance is withdrawn from the School or from independent schools generally or if there are exceptional changes in economic conditions. The School reserves the right to change the terms of the scheme, and the terms of any existing Advance Payment arrangement in place, should the Scheme be materially affected due to changes in legislation, particularly relating to taxation or charity law.

The School's standard Terms and Conditions as varied from time to time apply to and are incorporated in this scheme but these scheme conditions will prevail in the event of a conflict or ambiguity.