IAPS Charitable Trust

AWARDS POLICY (For IAPS Members)

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1) HISTORY OF iTrust

1.1 IAPS has a long tradition of charitable work. In addition to making donations to national charities, IAPS had established a few charities to deal with specific issues. In the past there were three active charities:

- Benevolent Fund, which supported teaching staff and their relatives in financial need.
- Bursary Trust, which helped to support former IAPS pupils with fees at senior schools.
- Orchestra Trust, which ran courses and latterly paid grants for children to pursue their musical education.

1.2 These separate charities each had small resources. They were unable to establish a high enough profile to expand their work, and the costs of administering them were large, relative to the grants available. IAPS Council determined that a new charity was needed that could provide a focus for the existing work. This new charity would have a wider remit for charitable support of the education of children in the age range of IAPS schools. It would also allow the Association to act immediately in the event of some pressing need.

1.3 The IAPS Charitable Trust (iTrust) was established in 2011 as a Charity (number 1143241) and a company limited by guarantee (number 07728215). Its objects may be summarised as being to support the education of early and middle years' children and to support the people who teach them.

2) iTrust AS IT STANDS CURRENTLY

2.1 IAPS Donations: IAPS Council fully supports the work of iTrust by covering the operating costs of the charity and, when finances permit, making donations to unrestricted funds and also to restricted funds.

2.2 Donations from schools: A number of IAPS Schools make a regular donation to iTrust.

2.3 Governance/Trustees: The ten Trustees of the Charitable Trust are also Directors of the company and are appointed by the members (who are the other Trustees/Directors). These include:

- IAPS Head of Finance who acts as the secretary/treasurer,
- Chairman (a retired IAPS Head),
- Grants Secretary (also a retired IAPS Head) who chairs the Scrutiny Committee,
- Seven Trustees the majority of whom are serving IAPS Heads. Two of the trustees sit on the Scrutiny Committee and at least one is responsible for the work of the Harrison Memorial Fund, processing all applications for music awards.

2.4 Meetings: The Board meets three times a year:

- The Autumn meeting examines the strategic direction for the charity; looks at risks, opportunities, strengths, and weaknesses; etc.
- The Spring term meeting focuses on the selection of candidates for the Award schemes.
- The Summer meeting in May is the AGM and will receive the annual accounts; determine the awards and benevolent grants for the following academic year; re-appoint bankers, investment advisors and auditors etc.

2.5 **Appointments**: When vacancies occur, these will be advertised on the IAPS website. Interested parties will be invited to send a letter of application addressed to the

Secretary/Treasurer highlighting the skills and experience that they can offer and why they would like to join the Board. These will be considered by the Board and if required an election will be held. If convenient, applicants may be invited to attend a Board meeting to see how the Charity works and how they might contribute.

2.6 If elected then, in accordance with the byelaws, trustees will normally serve an initial three years, and this may be extended to a second term. Trustees will be required to sign a Charity Commission Trustee Eligibility Declaration form on election and annually thereafter.

2.7 iTrust is keen to involve serving members of IAPS as Trustees and, whilst it is helpful for the Grants Secretary and Chairman to be recently retired heads who can devote time to the work of the charity, there is normally a maximum of three retired members of IAPS serving on the Board at any one time. iTrust has also agreed that it would be helpful for at least one of the Trustees to be a serving General Representative on the IAPS Finance Committee.

2.8 **Induction:** New members of the Board will be provided with the articles of association and briefed on their responsibilities as Trustees/Directors by the IAPS Head of Finance, the Chair and Grants Secretary. During these briefings, they will be asked to identify any training that they may require to fulfil their role.

3) THE WORK OF iTrust

3.1 What We Fund

We fund individuals at an independent school which is either an IAPS School or, under the terms of the Benevolent Awards Scheme and at the committee's discretion, one where a pupil is transferring from an IAPS school.

The support is for the provision of education for children in early, primary, or middle school years both in the UK and overseas where such provision cannot be provided by the parents and or school.

3.2 What We Do Not Fund

We do not fund senior school bursaries, gap year students, sixth form students, schools wanting extra money for salary costs, general appeal letters from charities, music tuition fees, sport coaching costs or travel.

3.3 Please Note: Unfortunately, owing to the limited financial resources of the Charity, not all the qualifying applications that are made each year will be successful. The Trustees and/or secretary cannot discuss decisions made in the meetings, or discussions during the meeting nor is there any appeal process.

4) CRITERIA FOR AWARDS

4.1 The Charity has two main schemes (as detailed below) and a Music fund scheme. These criteria have been agreed by the trustees as guidance for potential applicants on the procedures and priorities that will be used by the trustees in helping them to decide who they can help and how they will allocate the resources available.

4.2 The criteria provide an overarching framework, although the application forms and priorities will be different for the funds available in support of each of the objects.

4.3 The trustees will be free to diverge from the criteria where they decide that this is in the best interests of the beneficiaries in exceptional cases and where funds permit.

5) GENERAL AWARDS

5.1 The iTrust makes a number of awards, usually up to a maximum amount of £2,500 per year per pupil. Priority is given to pupils who have already started their education in IAPS schools, and whose families' financial circumstances have changed. The support of the school, or intended school, is essential and all awards must be at least match funded. Awards are made for one year but may be renewable for a further year subject to an annual needs' assessment review.

5.2 iTrust does not support pupils starting their independent education in senior schools nor those in the Sixth Form or gap year students. It focuses grants on organisations and charities that will be able to deliver the maximum benefit to children.

5.3 Applications must first be made through an IAPS member school. Some form of financial assessment is usually required, either carried out by the school or by BAL on iTrust's behalf

6) BENEVOLENT AWARDS

These awards are usually focused on promoting the education of children of members or deceased members of the teaching profession by providing financial support for them to continue their education in independent schools where their families' financial circumstances are such that they would otherwise be prevented from doing so.

6.1 Priority will be given to:

- the children of parents who have been a member of IAPS as a headteacher or who have retired from such headship;
- the children of parent(s) employed or formerly employed in IAPS schools;
- pupils in key examination years (i.e. years 10 and 11) or in their final year at a school (i.e. Y6 or Y8);
- pupils who would not otherwise be able to complete the year at their school and;
- pupils at schools where the school will at least match the funding.

6.2 Funds are limited and the total value of awards aims to equal income from restricted funds with donations and unexpended income applied to capital for future years.

6.3 Support offered will be to as wide a range of beneficiaries as possible, with small grants rather than a smaller number of larger grants. The grant will bridge the gap between the family's income and the fees required. This grant is unlikely to be the primary source of funding.

6.4 Applications will usually be made through an Independent school. A financial assessment will be required including such things as the family's circumstances, income, outgoings, expenditure, assets, capital liabilities and other dependent children. Where necessary, Bursary Administration Limited (BAL) will check applications on behalf of the ITrust.

7) MUSIC

7.1 The Harrison Memorial Fund awards grants to children in Years 3-8 to assist them attending choral or instrumental courses held in the UK. These typically include residential courses run by the Rodolfus Foundation and National Schools Symphony Orchestra, although other courses are considered upon application.

7.2 *Eligibility and procedures for applications for Harrison Memorial Fund support*
An application form for support can be downloaded from websites for the courses named above, or can be requested from the HMF Secretary by emailing harrisonmemorialsecretary@gmail.com. Applications are only accepted from parents who cannot afford the course fees without support. Completed application forms are emailed to the above address. Once the application is received, the HMF Secretary will contact the course provider and/or the child's school to confirm details given on the application form before any award is made. Awards are confirmed by email and the course administrator is informed directly. Payment is made directly to the course.

7.3 Conditions of award. Pupils attending the course are asked to write about their experience afterwards and send via email or to Head Office. This feedback is much appreciated by trustees. If feedback, or any included photos, is to be used in any publication, further agreement will be sought from parents first.

7.4 Deadline for HMF awards is dependent upon the date of the course.

8) ELIGIBILITY AND PROCEDURE FOR APPLICATIONS

8.1 Awards (except from the Harrison Music Fund) are entirely means tested and are made on an annual basis to parents who satisfy financial criteria in relation to their income and the value of their capital assets and demonstrate a need.

8.2 All awards (except from the Harrison Music Fund) are subject to an annual means test review either by the school or by the School's externally appointed advisors (BAL). Nevertheless, should any of the circumstances change, the Parents must inform the School without delay. For example, should the financial position of parents with a pupil already at the School change unexpectedly, they should contact the Bursar as soon as possible so that a way forward can be agreed. Failure to divulge requested information or a change in circumstances to the School could lead to an award being withdrawn or withheld.

8.3 Children of parents with high incomes or high assets are not normally considered for help except when there are compassionate circumstances affecting the financial

stability of the family. We anticipate that the families iTrust supports will have joint net assets usually in the form of a home and low incomes. They will NOT have any of the following:

- Significant savings
- A child already at an independent school fully funded by the parents
- A second property or land holdings
- Frequent or expensive holidays
- Expensive houses or cars

8.4 The Grants Secretary will notify applicants and the school they attend whether they have been successful or not. Schools in receipt of an award will be required to sign and comply with an iTrust agreement setting out terms and conditions.

8.5 It should not be assumed that, as a result of one child in a family being in receipt of a grant, other siblings will automatically be awarded one. Each case will be assessed separately.

9) DATA PRTOTECTION AND CONFIDENTIALITY

9.1 All information provided by parents in connection with an application will be processed in accordance with data protection principles as set out in the Data Protection Act and the IAPS Policy.

9.2 Data will be processed only for the purpose of consideration for awards and funding and the information provided will not be used for any other purpose.

9.3 The value and terms of the awards will remain confidential between the trustees and the school and parents.

10) CONDITIONS OF AN AWARD

10.1 Pupils who receive an award are required to work hard, to contribute positively to the life of the school, to be a credit to the school and set a good example to other pupils. They must adhere to the standards of conduct and progress.

10.2 Parents of pupils receiving an award are required to support and encourage the pupil in the school, comply with the school's terms and conditions, adhere to the notice period of the school, or pay the fees in lieu of notice.

10.3 Should an application be found to be false or a pupil be expelled or removed from a school then the award will need to be terminated and repaid by the parents.

10.4 Each year a copy of a pupil's annual report will be sent by school to the charity who reserves the right to withdraw the award should the child fail to fulfil their obligations.

10.5 Awards from any of the schemes are not transferable. If a pupil wishes to change school a new application must be made.

COMPLAINTS

The IAPS iTrust Complaints Policy is available from the IAPS office. iaps@iaps.uk

T Wheeler
iTrust Grants Secretary
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