



WESTMINSTER
SCHOOL

BURSARIES POLICY

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INFORMATION FOR PARENTS APPLYING FOR AN ACADEMIC BURSARY AT 13+ OR 16+

Parents considering applying for financial support for their child, should read all the information below carefully before proceeding with their application.

THE PURPOSE OF A BURSARY

The purpose of a bursary is to give financial support to a child who has the academic ability to benefit from a Westminster education, but whose parents would not be able to afford the fees either wholly or in part without unacceptable hardship.

WHO IS ELIGIBLE?

The School does not have inexhaustible funds for bursaries and therefore the Governing Body has decided that help may only be offered to pupils who live in London within the M25 London orbital, and who are able to commute daily to School. Boarding bursaries will not be awarded (with the exception of Queen's Scholars at the Great School who must board and who need additional financial support).

The Governing Body's criteria for the award of a bursary may be summarised as follows:

The child's academic ability

Every child who enters Westminster School must gain their place on academic merit. This is determined by examination and interview.

Parents' and child's nationality and residence

Eligible

Means-tested bursaries are available on entry to the School where one of the parents and the child fall into one of the following categories at the time of applying for a bursary:

- a) British citizens in possession of a British passport (The United Kingdom of Great Britain and Northern Ireland).
- b) Irish citizens in possession of a Republic of Ireland passport.
- c) Other citizens of the European Economic Area (EEA) or Switzerland, as defined by UK Visas and Immigration (UKVI), in possession of an EEA or Swiss passport or ID, who live in London and are in possession of settled or pre-settled status. See website: www.gov.uk/government/organisations/uk-visas-and-immigration.
- d) Those who have indefinite leave to remain in the UK.

Parents should consult the UKVI website for a detailed explanation of the criteria established by the United Kingdom, noting the specific changes following the UK's exit from the European Union (EU). These criteria are used by the School.

Parents who qualify under the above criteria must also live inside the M25 London orbital. The expectation is that their child will commute from home to School each day.

Other than for Queen's Scholars, bursaries are available for day pupils only.

Not eligible

Bursaries are not available to children of parents who

- Are in the UK on a visa, or
- Live outside the M25 London orbital.

Parents' financial circumstances

There are no exact financial criteria for bursaries but in judging a family's needs, all income, essential expenditure, and all assets in savings, investments and property will be assessed. Where for example a home is considered to be too large, in an expensive area or where excess equity could be released, a family may be expected to downsize or remortgage as necessary to release funds. It is also expected that savings in shares, ISAs, other investments and equity in second homes will be released. The School will then assess what level of bursary (between 10% and 100% of the fees) is needed. If in doubt of eligibility for a bursary, parents are encouraged to apply.

THE BURSARY PROCESS

There are three stages to the bursary assessments:

1. Parents' passports

Photocopies or scans of both parents' passports must be provided as evidence of eligibility to apply for a bursary on grounds of nationality. If eligible, the next stage is Part A.

2. Part A: initial assessment

The purpose of the initial assessment is for parents to provide a brief summary of their financial circumstances so that the School is able to establish whether a bursary is likely to be needed. It is essential that parents complete the Part A form in full. Any relevant background information should be included in the "Additional Comments" section of the Part A form.

The Bursar will assess Part A and, if it is judged that the child is likely to need or to qualify for a bursary, parents will be asked to submit a more detailed Part B (In Depth Assessment) bursary application form.

Single Parents should refer to the relevant section of the Guidance for Parents which is detailed below. This outlines the information that must be provided regarding the child's circumstances when completing the Part A form. The information is to be entered in the "Additional Information / Comments by Parents" box located at the end of the form.

3. Part B: in-depth assessment

The purpose of Part B is to allow the School to make a full assessment of a family's financial circumstances and needs. Part B will ask for several pieces of information and supporting evidence. It is essential that the Part B Form be completed in full and that copies of all supporting documents required are provided. The Part B form and supporting documents should be returned by the deadline: late applications will not be considered.

The supporting financial documents required from both parents will include copies of:

- Latest 12 months' full bank statements for all bank accounts (current, savings, ISA and investment accounts). Please note that account summary pages are not sufficient: full bank statements are required.
- Most recent P60s or payslips (or latest Company Annual Report & Accounts if self-employed).
- Latest mortgage statement or latest rent statement if rent is paid.
- Proof of all benefits received (e.g.: child benefit, universal credit, disability living allowance etc).

All bursary awards are decided by the Head Master on the advice of the Bursar. It is not possible to give a forecast of the level of any bursary award in advance. However, parents will be told if, based on Part A: initial assessment, a bursary would not be awarded and their application for a bursary will be closed by the School. If parents are asked to submit Part B: in-depth assessment, this does not mean that an award will be made, merely that the parents' circumstances are within the bracket for further consideration.

Completion of the applications may be time consuming and will involve a degree of intrusion by the School into a family's private financial affairs, but parents may be assured that papers will be carefully handled. If a child gains a place, the application and all papers will be retained for the record. If the child does not come to Westminster, papers will either be returned to parents if requested, or destroyed by shredding.

SPECIFIC GUIDANCE FOR PARENTS

Parents are requested to read the following Guidance Notes before completing bursary application forms. If they have difficulty answering any of the questions, they should consult the Bursar:

e: bursar@westminster.org.uk

t: +44 (0)20 7963 1028

Parents / Guardians / Single Parents

It is assumed that both natural parents have a joint interest in the education and general welfare of their child and therefore both parents' financial circumstances will be taken into account.

In cases where parents are separated or divorced, it is assumed that both parents retain that joint interest in their child and that financial provision for the child's education remains a joint matter.

For applications from single parents, the following information regarding the child's circumstances must be provided:

- Where is the other parent now?
- Has the child's other parent remained in contact?
- If not, when did their contact cease?
- Does the child's other parent contribute financially for the child?
- If not, when did they cease contributing?

Where either parent has remarried, their new family circumstances and responsibilities will be taken into account by the School.

Fully completed bursary forms and full financial declaration of all income and assets are required, as follows:

- A joint application from both the father and the mother of the child.
- If the parents are divorced or separated, a joint application from both the father and the mother of the child is preferred, although separate applications will be accepted where the parents so wish. Confidentiality will be maintained if requested.
- If the child has a single parent only, an application from both the single parent and from the child's other parent if they are still in contact with the child (see above).
- If one of the child's natural parents is dead, an application from the surviving parent. If they have remarried, a joint application from the parent and step-parent is requested.
- If the child has no parents, applications from the child's guardian(s) are required, or if the child has no guardian, then from the person(s) who has legal custody of the child.

Declaration concerning validity of information

The declaration at the end of bursary application forms should be signed by both parents (see above) of the child for whom application is made. If only one parent signs the form, the reason must be stated.

Income

Actual income should be declared for the current financial year and, if known, for the forthcoming year. In the case of self-employed persons and others who have not finally agreed their income for the last financial year with HMRC, a statement of income so agreed should be given for that year, together with a note to that

effect. Persons who normally use an accounting year other than April to April should state this fact and give the dates to which income declared refers.

Income from all sources must be included. Gross income before tax / National Insurance (NI) / pension contributions should be declared. In all cases income arising outside the UK should be included.

No deductions should be made in respect of allowances made for tax purposes (specifically: personal allowances; superannuation contributions; mortgage interest; covenants; and income from abroad). The amount of tax / NI / pension contributions or other deductions should be recorded on the form.

The full amount of all welfare benefits should be declared.

Parents should declare the gross amount of all income received by children who are wholly or mainly dependent on them, excluding only sums earned from the child's part-time employment (e.g.: Saturday or holiday jobs). Parents should also declare all income received under deeds of covenant, sums received as scholarships, student awards and funds held in trust for the child.

Assets

Parents should declare the value of all assets including their main home, second / additional properties, savings and investments in shares / ISAs, etc. Internet websites such as www.zoopla.com offer property valuations at no cost. It is expected that savings in shares, ISAs, other investments and equity in second homes will be released to meet school fees.

Expenditure

Mortgage repayments should be shown separately from any property / contents insurance payments.

Documentary evidence is required for mortgage, rent payments and council tax.

Data Protection Act

The law demands that the School should tell parents what information they are holding about them concerning bursaries and what they are going to do with that information. The law also says that they cannot open a file, hold and use this information about the parents without their agreement. These notes make it clear what Westminster School will do with the information given.

With the parents' agreement, when an application is made for a bursary, the Bursar opens a file, which will be kept in our filing system. Information provided will be stored with further details which may be required in order that a decision with regard to the bursary application can be made. Additional information may include reports received from a school, a doctor, a teacher or any other person.

The reason we collect and hold this information is to help the School to decide whether to award a bursary and, if so, at what level. The file record is useful because it allows us to keep proper financial records and also helps us to monitor how we are spending our money as a registered charity. Details of any payments or remissions we make to you will be held on our records.

The law requires that we hold basic accounting information on grants for at least six years. Information will not be held longer than needed and all the papers on file, other than a note of your name, will usually be shredded within seven years of our last contact with you.

The information in a pupil's bursary file is entirely safe. It may be passed to an educational charity if we believe this may be helpful, but only with the parents' permission. Nobody else other than the Head Master, the Bursar and the Bursar's senior team will be allowed to see your file or know about the bursary information. At the discretion of the Head Master, housemasters may be made aware of those pupils in their care who are in receipt of bursary awards. Underlying financial information is not shared in these circumstances.

The Bursary Application Form or additional papers may contain relevant personal information not only about the parents but also other people. If parents think this may happen, they should show the form / papers to the person(s) involved and make sure that they agree we can store and use the information.

In signing the Bursary Application Form, parents are giving their explicit consent to the exchange of information regarding all aspects of their personal data with schools and with other charities which might be able to help them. This means that parents consent to our disclosing and processing information given by them by letter or in the application form, and by the School in its confidential report, to any charity or individual who may provide funds for the pupil's education. It also means that parents consent to our obtaining and processing similar information from other charities with whom we are associated. Without this explicit consent, we will be unable to give any further consideration to your application.