



WESTMINSTER
SCHOOL

BURSARIES POLICY

Author: Amanda Oakley-Smith
Lead: Bursar & Chief Operating Officer

Reviewer: Finance and General Purposes Committee

Shared Policy across Westminster Great School and
Westminster Under School

Date: April 2025
Review Date: April 2028



WESTMINSTER SCHOOL

BURSARIES POLICY

INFORMATION FOR PARENTS APPLYING FOR AN ACADEMIC BURSARY AT 11+, 13+ OR 16+

OVERVIEW

Parents considering applying for financial support for their child on entry to Westminster School (comprising both Westminster Great School [WGS] and Westminster Under School [WUS]) 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 financial difficulty. All bursaries at Westminster are fully means-tested (i.e.: the quantum of any support is determined by the financial means of the applicant).

WHO IS ELIGIBLE?

The School does not have inexhaustible funds for bursaries and therefore the Governing Body has decided that help may normally only be offered to pupils on entry at Year 7 (11+), Year 9 (13+) or Year 11 (16+) 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 King's Scholars at the Great School who must board and who might require 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.

- **Point of entry**

A bursary is only awarded on entry to the School, at 11+, 13+ and 16+ only. Bursaries are not offered at any other entry points. As Westminster Under School is a separate school within the charity that owns both schools, pupils at Westminster Under School who are applying for places at Westminster Great School at 13+ may apply for a Bursary during the normal admissions process for 13+ entry.

- **Parents' and child's residence**

Eligible:

Bursaries are available on entry to the School, at 11+, 13+ and 16+, where the child will have right to live and study in the UK on commencement of their studies at the School and at least one of the parents and the child have lived in the UK for at least two continuous years at the time of applying for a bursary. Parents and candidates must fall into one of the following categories:

- i. British Citizens in possession of a British passport (The United Kingdom of Great Britain and Northern Ireland) and Irish Citizens in possession of an Irish passport; or
- ii. have 'settled' or 'pre-settled' status; or
- iii. have 'indefinite leave' to remain in the UK.

Parents should consult the UKVI website for a detailed explanation of these immigration criteria established by the UK Government. It is these criteria that are used by the School.

Parents who qualify under the above criteria must also live inside the M25 London orbital at the time of applying for a bursary and whilst their child is in receipt of bursary funding from School. The expectation is that their child will commute from home to School each day.

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

Not eligible

Bursaries are not available to children of parents who have not lived in the UK continuously in the two years prior to applying for a bursary; or live outside the M25 London orbital at the date of application for a bursary or whilst their child is in receipt of bursary funding from the School.

- **Size of the bursary award**

The School has limited funds and the underlying principle used in determining the size of awards is to widen access to the School without imposing undue hardship upon the families of those receiving fee assistance. The School has a fixed annual allocation for funding new bursaries which is approved by the Governing Body, notably the demand for fee support is typically significantly higher than the fixed annual allocation. The School will use its judgement to act as fairly as possible in determining the size of the award for each pupil whilst ensuring its funds are well focused. Please note, completion of the bursary assessment process does not guarantee that an award will be made, merely that the parents' circumstances are within the bracket for further consideration.

- **What does a bursary award cover?**

A bursary award provides a percentage fee remission for parents who have accepted a place at the School for their child. Awards may vary from 5% to a 100% fee remission. In addition, pupils who receive 100% fee remission will also receive reimbursement of travel costs, book and stationery costs, compulsory curriculum trip / expedition costs, examination costs as well as a one-off uniform and sports kit grant. Music lessons outside of the curriculum will be paid for by parents directly to the music teacher. If a music scholarship has also been awarded, the terms of this are outlined in the Music Scholarship confirmation of the award.

If the bursary is less than 100%, there will be a proportional charge for the above costs, plus any relevant VAT, except for the uniform grant which is only available to full bursary pupils. Parents may apply for permission in advance from the Finance Bursar for participation in elective trips on a case-by-case basis. This can be arranged through contacting the Bursar & Chief Operating Officer's EA (e: bursar.secretary@westminster.org.uk or t: 020 7963 1028).

Pupils will be provided with a suitable classroom electronic device (currently iPad and Apple Pencil) in order complete their assignments.

- **Parents' financial circumstances**

There are no exact financial criteria for bursaries, but in assessing a family's needs, all forms of income, essential expenditure, and all assets in savings, investments, pensions, owned property, and liabilities and obligations will be taken into account.

The School would explore:

- The ability to improve the financial earnings of the family. For example, if both parents are able to work and earn an income, the School would expect them to do so.
- The opportunities for the release of equity in owned property. If a family home were considered too large or in an expensive area, moving or re-mortgaging would be expected to release capital, as would any equity in a second home or a rental investment portfolio.
- The use of any investments and or savings (of whatever type) to pay the fees.
- In the case of separate parents, the possible contribution made by both parents. The School will financially assess the capacity of both parents to contribute to the fees unless there be a strong reason not to do so.

The School will then assess what level of bursary (between 5% and 100% of the fees) is required. If in doubt of financial eligibility for a means-tested bursary, parents are encouraged to apply and to discuss their circumstances with the Finance Bursar. This can be arranged through contacting the Bursar & Chief Operating Officer's EA (e: bursar.secretary@westminster.org.uk or t: 020 7963 1028).

THE BURSARY ASSESSMENT PROCESS

There are three stages to the bursary assessments:

1. Passports and evidence of residence

Photocopies or scans of both parents' and the child's passports must be provided as evidence of identity. The School may also ask for satisfactory evidence that at least one of the parents and the child have lived in the UK for at least two years including UK council tax and utility bills. 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 and on time. Incomplete or late forms will not be processed. Any relevant background information should be included in the "Additional Comments" section of the Part A form.

The Finance Bursar will assess the 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 Sections 1-5 of the "Specific Guidance for Parents" below. This outlines the information that must be provided regarding the child's circumstances when completing Part A. 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. Part B and supporting documents should be returned by the deadline. Incomplete forms will not be processed.

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, Investment accounts) and credit card 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).
- Pension statements.
- 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.).
- Copies of relevant maintenance and court orders.

Deadlines

An indication of associated bursary deadlines for the different entry points is shown below. The School will adhere strictly to all deadlines.

Entry Point	Pupil Registration Deadline	Bursary Assessment Process and Deadlines
11+ entry	Registration opens from 1 September when children are in Year 5. 11+ registration closes 1 year in advance of entry, on 30 September.	The intent to apply for bursary <u>must</u> be made at the point you register your child for a place at the School. Where intent to apply for a bursary has been declared, Part A initial assessments will be issued in early April of the year prior to entry, and should be returned no later than 30 September the year prior to entry. Part B in-depth assessments are undertaken <u>only</u> where Part A indicates a family may be eligible for financial assistance, and once ISEB outcomes are known (December the year prior to entry). The deadline for Part B is the third Friday of January of entry year. In early February of the entry year "home visits" will be undertaken either physically, or virtually as part of the bursary process.

Entry Point	Pupil Registration Deadline	Bursary Assessment Process and Deadlines
13+ entry	<p>Registration opens when children are in Year 5.</p> <p>13+ registration closes 3 years in advance of entry year, on 30 September.</p>	<p>The intent to apply for bursary <u>must</u> be made at the point you register your child for a place at the School.</p> <p>Bursary applications should be completed <u>only</u> if your child is offered a place, communicated in February of Year 6.*</p> <p>Part A initial assessments take place from the point your child is offered a place through to the third Friday of January of the entry year.</p> <p>Part B in-depth assessments are undertaken <u>only</u> where Part A indicates a family may be eligible for financial assistance. The deadline for Part B is 28 February of the entry year.**</p> <p><i>* If families wish to appeal for registration fees to be waived, they will be asked to complete a Part A initial assessment prior to their child being offered a place.</i></p> <p><i>** This deadline does not apply to unregistered candidates who are sitting "The Challenge".</i></p>
16+ entry	<p>Registration opens on 1 June the year prior to entry and closes on 30 September the year prior to entry.</p>	<p>The intent to apply for bursary <u>must</u> be made at the point you register your child for a place at the School. Families intending to apply for a bursary for their child should complete their registrations by <u>23 September</u> the year prior to entry. Please note this is 1 week in advance of the registration deadline.</p> <p>Part A initial assessments form part of the registration process.</p> <p>Part B in-depth assessments are undertaken <u>only</u> where Part A indicates a family may be eligible for financial assistance, and <u>only</u> for those candidates invited for interview usually in the last week of November of the year prior to entry. The deadline for Part B is 1 week prior to confirmed interviews.</p>

All bursary awards are ultimately decided by the Master (WUS) and / or Head Master (WGS), as appropriate, on the advice of the Bursar & Chief Operating Officer. It is not possible to give a forecast of the level of any bursary award in advance of any award. 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 very carefully handled. If a child gains a place, the application and all papers will be retained for information. If the child does not come to Westminster, information held electronically will be deleted and any papers will either be returned to parents if requested, or destroyed.

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 & Chief Operating Officer's EA, in the first instance (e: bursar.secretary@westminster.org.uk or t: 020 7963 1028).

Parents / Guardians / Single Parents

1. It is assumed that both natural or adoptive parents have a joint interest in the education and general welfare of the child and therefore both parents' financial circumstances will be taken into account.
2. 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. If there is a relevant Court Order in place, this must be submitted to the Bursar & Chief Operating Officer's EA (e: bursar.secretary@westminster.org.uk).
3. For applications from single parents, the following information regarding the child's circumstances must be provided:
 - 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?
4. 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 point 3 above).
- If one of the child's natural parents is deceased, 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 their guardian(s) are required, or if the child has no guardian, then from the person(s) who has (have) 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 notes 1 and 2 above) of the child for whom an 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 March 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. The level of pension contributions should be disclosed. In all cases income arising outside the UK should also be included.

No deductions should be made in respect of allowances made for tax purposes or otherwise (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 and maintenance / separation allowances should be declared. Parents should also declare any benefits in kind that they receive from their employment.

Parents should declare the gross amount of all income received by children who are wholly or mainly dependent on them, excluding only any 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, owned rental properties (including the percentage ownership if this is a partial investment), vehicles, savings and investments in shares / ISAs, pension funds, businesses etc. Internet websites such as Zoopla.com offer property valuations at no cost. It is expected that savings in shares, ISAs, other investments and equity in second homes or owned rental properties will be released to meet school fees. It is also expected that where there is significant equity in the main home this will be released to meet school fees. Parents should also disclose ownership of any businesses, and submit a copy of the most recent financial accounts.

Expenditure

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

Documentary evidence is required for mortgage, loan agreements, 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 & COO 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 destroyed 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 the Master and / or Head Master, the Bursar & Chief Operating Officer and the Bursar & Chief Operating Officer's senior team will be allowed to see your file or know about the information contained in a pupil's bursary file. At the discretion of the Master and / or Head Master, then members of the Senior Management Team (WUS) / Senior Management Committee (WGS) heads of year and / or 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 persons 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.