



WESTMINSTER
SCHOOL

BURSARIES POLICY

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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 should read all the information below carefully before proceeding with their application. This policy applies to pupils in Westminster Under School (WUS) and to pupils in Westminster School (Westminster Great School or WGS): both schools together constitute the School or Westminster.

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 Under School or 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 normally offered at any other entry points.
- **Parents' and child's residence**
Eligible:
Bursaries are normally 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 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 normally 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.

- **Parents' financial circumstances**

There are no exact financial criteria for bursaries, but in assessing a family's needs, all income, essential expenditure, and all assets in savings, investments and property will be taken into account. Where for example a large home in an expensive area might reasonably be downsized, or where excess equity could reasonably be released, a family may be expected to downsize or remortgage to release funds for school fees. 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 required. If in doubt of financial eligibility for a means-tested bursary, parents are encouraged to apply and to discuss their circumstances with the Bursar.

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. At the School's discretion, incomplete or late forms may not be processed. Any relevant background information should be included in the "Additional Comments" section of the Part A form.

The Bursar & COO 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. At the School's discretion, incomplete forms may not be processed. Part B 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, 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).
- 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 ultimately decided by the Master (WUS) and / or Head Master (WGS), as appropriate, on the advice of the Bursar. 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'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 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'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:
 - 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?
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 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 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. 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 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 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, savings and investments in shares / ISAs, 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 will be released to meet school fees.

Expenditure

Mortgage repayments should be shown separately from any property and / or 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 & 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 & COO and the Bursar & COO'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 the Master and / or Head Master, 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.