



WESTMINSTER UNDER SCHOOL

Bursaries Policy: Information for Parents Applying for an Academic Bursary

Written by:	MJWa
Version number:	4.0
Effective date:	June 2021
Summary of changes:	
Approved by:	Governing body
Related policies:	Minor updates Ensuring policy consistency with Westminster School
Audience:	Governors, parents who may apply for bursary
Last version:	3.0
Last review date:	February 2020
Next review date:	June 2022
Person(s) in charge of review:	Bursar

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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 on entry to pupils who join Westminster Under School at 11+, who live within the M25 London orbital, and who are able to commute daily to School. Boarding bursaries, if a pupil transfers to the Westminster School, 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 entry point

Only boys applying for entry into Year 7 are eligible to apply for bursaries. The School does not provide financial support for boys entering Years 3 or Year 4.

The child's academic ability

Every child who enters Westminster Under School (and Westminster School) must win 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 at Year 7 where one of the parents and the child fall into one of the following categories **at the time of applying for a bursary**:

- British citizens in possession of a British passport (The United Kingdom of Great Britain and Northern Ireland); **or**
- Irish citizens in possession of a Republic of Ireland passport
- Other citizens of the European Economic Area (EEA) or Switzerland, as defined by the 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
- Has 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.

➤ Not eligible:

- Bursaries are not available to children of parents who
 - are in the UK on a visa
 - 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, and 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:

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.

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 can establish whether a bursary is likely to be needed. It is essential that parents complete the Part A form in full. At the School's discretion, incomplete forms may not be processed. Any relevant background information should be included in the "Additional Comments" section of the Part A form.

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

Single Parents

Single Parents should refer to Sections 1-5 of the Guidance for Parents 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.

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 is completed in full and that copies of all supporting documents required are provided. At the School's discretion, incomplete forms may not be processed. The Part B and supporting documents should be returned by the deadline given. 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). Please note that account summary pages are not sufficient, full bank statements for all accounts 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 Master of the Under School and the Head Master of the Great School 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 the 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 a 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 wins a place, the application and all papers will be retained for their 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, Mr Martin Walsh (email: bursar@westminster.org.uk or telephone: 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.
3. For applications from single parents, the following information regarding the child's circumstances must be provided:
 - a) Where is the other parent now?
 - b) Has the child's other parent remained in contact?
 - c) If not, when did their contact cease?
 - d) Does the child's other parent contribute financially for the child?
 - e) 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.

5. Fully completed bursary forms and full financial declaration of all income and assets are required, as follows:
 - a. A joint application from both the father and the mother of the child.
 - b. 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.
 - c. 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 No. 3 above).
 - d. If one of the child's natural parents is dead, an application from the surviving parent. If he or she has remarried, a joint application from the parent and step-parent is requested.
 - e. If the child has no parents, applications from his/her guardian(s) are required, or if the child has no guardian, then from the person(s) who 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 note 1 and 2 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/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 etc. 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 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. The information provided will be stored with any 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 you 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 Master, Head Master, Bursar and the Bursar'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, the Assistant Master (Pastoral) 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. 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 the application.