BURSARY POLICY

Reviewed:	September 2026
Date of next review:	September 2027
Produced by:	Commercial Director
Approved by:	Governor Finance Committee

Monitoring, evaluation and review

The School will review this policy annually and assess its implementation and effectiveness. The policy will be promoted and implemented throughout the school.

Background

1. Westholme School is committed to providing financial support for academically able children from low income backgrounds through **means-tested bursaries**. The school does not make financial awards solely on the basis of academic, musical or sporting merit; instead we seek to direct our bursary funds to those families most in need, to allow their child to fulfil his or her academic potential.

2. Bursaries range in value from 5% to occasionally up to 100% of the full fee, depending on the family's financial circumstances and available school funds. We award bursaries to families whose gross income from all sources, which takes into account household income and savings, is less than £70,000 per annum. All of our bursaries are funded from donors, charities, trusts, foundations and school funds. A full bursary award is of significant value and cost and we therefore follow a rigorous process of identifying which families should be awarded bursaries.

Eligible pupils

3. The school's means-tested bursaries are generally only available for **external** candidates joining our Senior School in Year 7 and Year 12.

4. An application from a current pupil will only be accepted in exceptional circumstances where the family have undergone a significant and permanent change in circumstances; parents should write to the Principal outlining the exceptional circumstances. The Principal will decide if the bursary application may proceed.

5. A bursary application will only be successful if both of these two criteria are met:

    a. The child is of good academic ability, as demonstrated by their performance in the entrance exam (Year 7) or their interview/GCSE grades (Year 12) **and**

    b. It is proven that the family is in financial need.

The means-testing criteria: Year 7 and Year 12 candidates

6. Bursaries are means-tested and parents whose gross income from all sources exceeds £70,000 per year are unlikely to qualify for an award. Full or partial bursaries may be offered according to the family's financial circumstances. We must emphasise that demand greatly exceeds supply and we cannot meet all requests for bursary support, even if the eligibility criteria have been fulfilled.

7. Families should request a bursary application form when completing the School's applications process via our online system. A member of our Admissions team will then be in contact to begin the bursary application process. **Please note it is the applicant's responsibility to supply <u>all</u> of the supporting evidence required by the bursary application. The school will not contact you for documentation that you omit to include.**

8. An independent company will conduct a home visit and interview to assess the circumstances of any bursary candidate to whom we are considering making an offer. During the home visit families will be asked to provide relevant financial records and respond to questions about their financial history, current situation, lifestyle and ongoing commitments. A confidential report will be sent to the school.

Bursary offer principles

9. The size of the bursary award is determined by the extent of financial need, rather than according to the child's level of academic ability. Each bursary application is assessed on its own merits and awards are made accordingly, subject to the funds available each year. **Our overriding principle is to support families who are doing everything within their means to make a contribution to school fees, however small.** The school has a duty to its donors and other supporters to ensure that all bursaries are focussed on those in greatest need who can most benefit. We will take into account a number of factors in determining the level of financial support we can offer, including:

    - Current earnings.
    - The ability to improve the financial position or earning power of the family. For example, where there are two parents, both would be expected to work unless one is prevented from doing so through incapacity or the need to care for dependents.
    - Opportunities to release any capital. Significant capital savings and investments would be expected to be used for the payment of school fees, as would surplus equity values in properties.
    - In cases of separation, the contribution made by the absent parent.
    - Contribution by others to household costs, for example by extended family members, any adults unrelated to the child or other sources.
    - Payment of fees to other schools.
    - Lifestyle of the family.
    - New partner's income.

10. The aim of the bursary scheme is to enable children to attend the school who due to their financial situation would otherwise be prevented from doing so. In order to ensure that we are adhering to the principle of supporting families who are doing everything they can to contribute to school fees, the school considers that the following would not be consistent with the receipt of a bursary:

    - Significant savings or a trust fund.
    - Second property or land holdings.
    - Frequent or expensive holidays.
    - Expensive or luxury cars.
    - Investment in significant home improvements.
    - Ability to seek places on high cost school trips.

Bursary decisions

11. Where demand for bursaries exceeds the supply of funds, bursaries will be offered based upon the relative performance/rank of each applicant in the entrance exam. If an applicant performs relatively lower than other applicants in the entrance exam, they may not be offered a bursary.

12. Applicants who have not been awarded a bursary may still be offered a full fee paying place if they have achieved the minimum academic criteria.

13. The school's decision on bursary offers is final; there is no appeals procedure as it is the responsibility of applicants to provide true and accurate information through the application process.

Terms and conditions

14. When accepting a bursary award, parents are bound by the Terms and Conditions. These Terms and Conditions are provided to parents upon offer of a school place. Bursary awards may be withdrawn or reduced if there is any breach of these terms and conditions or if, in the opinion of the Principal and after appropriate consultation and support, the child's progress, attendance, attitude or behaviour no longer merits the continuation of the award.

15. All bursary awards are subject to a periodic review to ensure that our funds are being awarded to those families in greatest need. Parents of bursary holders may be asked to complete a confirmation statement or a means-testing form to reflect their financial circumstances and may receive a home visit by an independent company to verify all the information provided. This review process may lead to the bursary payment being amended to reflect the family's circumstances and their ability to pay.

16. The school reserves the right to review a bursary award at any time, for example if information comes to light indicating that a family's circumstances have changed and/or a family does not meet our bursary criteria. In this situation the school may seek to recover any bursary funds awarded.

Confidentiality

17. The school respects the confidentiality of individuals and families in receipt of a bursary award and recipients are expected to do likewise.