



## **Bursary and Scholarship Policy**

### **Means-Tested Bursaries**

#### **General**

The Governors of Westfield School are committed to broadening access to the school by offering to eligible parents/guardians means-tested financial support with the payment of school fees. Such support is known as a Bursary and these may be awarded in the form of a discount of up to 50% on tuition fees payable, depending on the financial, compassionate or other pertinent circumstances of applicants.

Bursary awards are subject to repeat testing of parental means each year and may be varied upwards or downwards, depending on parental circumstances. Awards are made on the basis of the Westfield School Scale of Awards, which sets out award levels in relation to a family's financial circumstances. The Scale of Awards is reviewed and revised annually by the Bursar to reflect any changes in fee costs, and approved by the Governors. Though awards are generally tied to this scale, they may be varied upwards or downwards depending on individual parent's circumstances (e.g. their savings, investments and realisable assets, as well as their income, the size of their family, any other persons dependent upon them and similar factors), compassionate or other pertinent considerations. NB: a voluntary reduction in family income will not be maintained by an increase in the level of help if, for example, parents give up employment by choice.

Requests for financial support usually fall into two categories:

- New applicants to the school, where a place has been offered but parents are unable to fund the tuition fees.
- Existing pupils where a change in parents' circumstances has resulted in difficulty in meeting tuition fees and may result in the child being withdrawn part way through a stage of education.

#### **New Applicants to the School**

Awareness: Information provided by the School alerting the parents of potential pupils to the possibility of gaining means-tested financial support with the payment of schools fees is included in:

- The School prospectus.
- The School website.
- The local press by means of advertisements.

The Application Process: Bursaries may be made available to parents of children entering any year-group of Westfield School. They are awarded at the discretion of the Governors and the Head and School Bursar are responsible for the management and coordination of the process.

- Step One. Parents seeking a bursary are required to complete an application form which seeks to establish the financial circumstances of the household. The form, which requests details of income and capital, may be found at Annex A and must be accompanied by full documentary evidence. The completed forms, together with the necessary documentary evidence, are to be submitted to the Bursar no later than the **1 April** in any year for bursaries to start the following September. Awards are identified by 1 May, in good time for parents to consider the level of financial assistance offered when deciding whether or not to accept a place at Westfield School in the new academic year commencing in September.
- Step Two. The Bursar assesses all applications in order to establish the likely level of support which will be required in order to allow the child to attend the School. This may involve the Bursar, or her

representative, visiting the parents' home to ensure the information has been correctly interpreted and the basis of the financial assessment has been fair.

- Step Three. The Bursar prepares a recommendation in accordance with the Westfield School Scale of Awards which is considered with the Head and a joint decision is then reached.
- Step Four. The parents are advised whether their child is to be offered a place at the School and of the Bursary offer.
- Step Five. Parents are then required to sign a letter accepting the place at the school and an acknowledgement agreeing to any conditions relating to the bursary. Families can be assured that, at all stages, the information they supply remains confidential to a very small number of staff in the finance office.

### **The Case for Assistance.**

The Headmistress and Bursar will consider a number of factors when making the judgement as to the justification for support, and the extent of such support. In the main, the child's suitability for the school is the first consideration in granting support.

- Suitability. In assessing a child's suitability, attention will be given to the academic assessment result of each applicant, but potential will also be considered as well as actual achievement. Bursary funds are limited and those judged most suitable will be given priority as those likely to gain most from the educational provision. Each pupil to whom support is offered must, in the opinion of the Head, be likely to make sound academic progress following admission and possess the potential to develop the quality of his or her work, and benefit from participation in the wider, extra-curricular activities on offer at the School. In normal circumstances, each applicant should meet the School's normal academic requirements. Previous school reports will be consulted for evidence of good behaviour.
- Financial Limitations. The amount of the bursary award is not influenced by the level of the academic ability of the child but by the extent of need. Each case is assessed on its own merits and awards are made accordingly, subject to the School's ability to fund these within the context of its overall budget. It is recognised that judgements about what sacrifices a family should make to pay school fees will be personal. However, the School has a duty to ensure that all bursary grants are well focused and so, as well as current earnings, other factors which will be considered in determining the necessary level of grant will include:
  - The ability to improve the financial position or earning power of the family. For example, where there are two partners, both would be expected to be employed unless one is prevented from doing so through incapacity, the need to care for children under school age or other dependents, or the requirements of their partner's work.
  - Opportunities to release any capital. Significant capital savings and investments would be expected to be used for the payment of school fees, as would equity values in houses.
  - In cases of separation, the contribution made by the absent parent.
  - Contribution to household costs by other, wider, family members, any adults unrelated to the child or by outside sources.
  - Where fees are being paid to other schools (or universities) the School's grant will take into account all these outgoings.
  - Acknowledging that others might have a different view, the School considers that the following would not be consistent with the receipt of a bursary:
    - Expensive holidays abroad.
    - Luxury cars.
    - A second property/land holdings
- Other Factors. It is recognised that, in addition to academic ability and financial constraints, there may be other circumstances which should be considered. These include:

- Where a child has siblings at the School.
- Where the social needs of the child are relevant (eg: may be suffering from bullying at their present school).
- Where a parent/guardian is terminally ill or is unable to secure permanent employment due to poor health.
- Where a separation has resulted in the child having to be withdrawn from the School adding to the stress of coping with the parents/guardians separating.

There is no course of appeal following the award decision, but unsuccessful applicants may re-apply in subsequent years.

#### **Existing Pupils - Change in Family Circumstances**

Within overall budget funding, the School will in normal circumstances set aside each year a Hardship Fund, for cases of sudden, unforeseen need or where applications meriting bursary assistance are received out of the normal calendar cycle for bursary submission, scrutiny and award. This sum will be set within budgetary constraints. Parents/guardians with a child at the School whose financial circumstances suddenly change may apply for a bursary to the Bursar, explaining their situation and using the forms at Annex A. Such awards are subject to the availability of funding and cannot be guaranteed.

#### **Annual Review**

All bursary awards are subject to repeat testing of parental means each year and may be varied upwards or downwards depending on parental circumstances. Current bursary holders will be issued with repeat means-testing forms in mid-February of each year for return by the end of the month. For those previously in receipt of bursaries, the Headmistress and Bursar, have the discretion to reduce or withdraw an award not only where a pupil's progress, attitude or behaviour has been unsatisfactory but also where the parents/guardians have failed to support the school, for example by the late payment of any contribution they are making to the fees.

#### **Confidentiality**

The School respects the confidentiality of bursary awards made to families and recipients are expected to do likewise.

#### **Other Sources of Bursary Assistance**

In addition to the School's Bursary Fund, there are a number of educational and charitable trusts which provide assistance with tuition fees. In the majority of cases, these are to assist children who are already attending a fee-paying school and due to a change of circumstances may be unable to remain. Westfield School encourages parents/guardians to apply for support where it is felt a good case can be made for assistance. Further information on how to pursue such assistance may be obtained from:

The Bursar  
Westfield School  
Oakfield Road  
Gosforth  
Newcastle upon Tyne  
NE3 4HS

Email: [bursar@westfield.newcastle.sch.uk](mailto:bursar@westfield.newcastle.sch.uk)

#### **Non-Means Tested Scholarships**

At Westfield School, scholarships are awarded on the basis of academic merit in a competitive process.

From September 2016 Scholarships include:

- 9+ Academic, Music, PE and Art
- 11+ Academic, Music, PE and Art
- 13+ Academic, Music, PE and Art

- 16+ Academic, Music, PE and Art (all girls in Year 11 are eligible to apply if they do not already hold a scholarship awarded at 9+, 11+ or 13+)

All girls in Lower Three i.e. Junior House are considered for a scholarship along with external candidates. They spend a day in Senior House, taking English, Maths and Verbal Reasoning examinations interspersed with chosen activities. All candidates are interviewed by the Headmistress. Candidates applying for a Music scholarship are auditioned by the Director of Music. Candidates applying for a PE scholarship are assessed by the Head of PE. Girls applying for an Art Scholarship are assessed by the Head of Art.

The nominal financial benefit of scholarships is determined annually by the Board of Governors during the Spring Term in the previous academic year. Awards to recipients are presented at our annual Awards Ceremony.

Please note that scholarships are granted for the duration of a girl's career at Westfield, subject to the pupil's work and conduct continuing to meet the standard required by the school. Pupils and their families who benefit from a scholarship must abide by the terms and conditions of the award.

Successful applicants will receive an award which will be applied as a reduction to basic fees. Scholarship awards for any one pupil may be up to, but will not exceed, a maximum of 25% remission of basic fees. To be eligible for a scholarship, pupils must sit the entrance examination on the date specified in the school calendar and attend a scholarship assessment day upon invitation.

Finally, pupils who are awarded a scholarship pay also apply for a bursary but will only be eligible up to a maximum 50% **total assistance**.

#### **Support for Westfield Families**

- Sibling Reductions. From September 2016 any family with two or more daughters at the school is eligible for a discount off fees for the second, third and any subsequent daughters. Full fees will be charged for the first child's place, the second will receive 10% remission of fees and the third and subsequent children, 15% remission. As siblings leave the school, leaving one child from the family in school, the charge will revert to full fees.
- Former Pupil's Allowance. A discount of a 5% reduction off the fees is offered to the daughter or grand-daughter of any girl who attended Westfield in the past. To be eligible for this allowance, the mother must have been a pupil at the school for a minimum of five years. The school must also be satisfied that the daughter meets the entry criteria and the school is able to meet her educational needs.
- Where multiple awards may apply. Please note that in the case where a family may be eligible for a combination of the following awards: scholarship, former pupil's allowance and sibling discount then **only** the largest single concession will be deducted from the fees. The only situation in which the maximum single award may be augmented is when a family applies for a means-tested bursary. Please note that a maximum of 50% total assistance applies.
- Hardship cases. The Governors assess individually any other cases brought to their attention concerning parents of children already at the school, who are experiencing particular hardship, brought about by illness, loss of employment etc. Such assistance as may be granted will be at the sole discretion of the Governors and will remain confidential. It will normally be granted for a fixed duration with a regular review of circumstances being required.

This policy is subject to annual review to agree levels of funding and any extension of arrangements at the same time as budgets and fees are set for the following year.

Reviewed and updated September 2016