



West House

INDEPENDENT PREPARATORY SCHOOL FOR BOYS

BURSARY POLICY

For academic year: 2025-26

POLICY FOR MEANS TESTED BURSARY PROVISION EXPLAINED



POLICY FOR MEANS TESTED BURSARY PROVISION

Introduction

- 1) West House School is committed to broadening access to the School to pupils able to take full advantage of all the opportunities on offer, irrespective of parents' means.
- 2) This policy has been authorised by the Governors in furtherance of the Charity's public benefit policy.
- 3) This policy contains an overview of the Bursary Scheme currently in operation at West House School and provides details of the procedure for applications to and awards made under the Scheme. It is to be read in conjunction with:
 - The School's Admissions Policy
 - Conditions of Award
 - Scale of Fees
 - Means-testing Forms.
- 4) The Schools are committed to providing a first class education to talented boys from a broad social and financial background by offering eligible parents/ guardians means-tested financial support with the payment of School fees. Such support is known as a Bursary and may be awarded in the form of a discount of up to 100% on fees payable.
- 5) Due to the limited financial resources of the Schools not every eligible application for an Assisted Place will be successful. Places are awarded on the basis of an age specific academic assessment. The School's decision is final and there is no right to appeal.

Terminology

- 6) School: means West House School
- 7) Governors: means the Governors of West House School.

Eligibility

- 8) Assisted Places at the School are available to applicants who have been on the school roll or formally applying to the school for Reception to Year 6 for the academic year September 2025 – August 2026.
- 9) A published Scale of Fees is used to determine the value of the award with reference to a family's Relevant Income. Relevant Income is based mainly on combination of Gross Income and Gross Assets and is calculated by the Means-testing Form. As a guide, the upper limit for total parental relevant income is currently set at £85,000 and the upper limit for Gross Assets is £400,000.

- 10) It is recognised that judgements about what sacrifices a family should make to pay School fees will be personal. However, the School have a duty to ensure that its limited charitable resources are directed towards the most deserving cases and for this reason an Assisted Place is not intended to support families that, with reasonable financial and personal sacrifices, could have otherwise afforded paying the full fee.

Family finances with the following characteristics would not normally be considered eligible for an Assisted Place:

- opportunities to release capital. Significant capital savings, retained profits in a business and investments would be expected to be used for the payment of School fees, as would equity value in houses;
 - proven ability to borrow, where families have been able to secure additional mortgages on buy-to-let properties;
 - in cases of separation, any significant contributions made by the absent parent; and
 - contributions to household costs and school fees by other, wider family members, any adults unrelated to the child or by outside sources; and
 - other indicators of wealth, for example:
 - Frequent or expensive holidays
 - New or luxury cars
 - Investment in significant home improvements
 - A second property / land holdings
- 11) In cases where a pupil is deemed to be ineligible for the scheme for the reasons listed above, this will be presented to the Governors for authorisation.

Terms of Assisted Place provision

General

- 12) The School reserves the right to make or alter its overall Assisted Place scheme from time to time in the light of its changing financial, or other, circumstances.
- 13) Any terms on which an Assisted Place is made to an individual will be set out as part of the offer of a place and will generally continue for the child's duration at the School subject to annual review (see below). Changes in the application of the scheme to individuals already at the School will be at the discretion of the Headmaster.
- 14) Assisted Places awards are expressed as a % of the school fee payable which is based on the 'Scale of Fees' charged. The Scale of Fees is updated annually to reflect any increases in Tuition Fee approved by Governors.
- 15) Assisted Places awards are reviewed annually (see below) to take account of changes in parental circumstances, and where parents' circumstances have improved, the level of Assisted Place will fall and where parents' circumstances have worsened, the level of Assisted Place may be increased.
- 16) The Headmaster's decision is final in awarding an Assisted Place. The Bursar's decision is final in determining eligibility for the scheme and in assessing fees payable.

Supplementary charges

- 17) Assisted Place awards apply to tuition fees only (before VAT). Supplementary charges, including school meals, must be paid in accordance with the terms and conditions of the School.

Confidentiality

- 18) The School respects the confidentiality of Assisted Place awards to families and recipients are expected to do likewise.

Applications

- 19) Applications for financial support fall into two categories: new applicants and existing awards both which are reassessed on an annual basis.

New applicants for current pupils in Reception to Year 6

- 20) Means-tested Assisted Places are available for new applicants for boys currently in our Reception to Year 6 at the School.

All awards are conditional on:

- full disclosure of information requested within the timescales given. A considerable amount of personal information will be required as well as documentary evidence (this may include payslips, P60, HMRC self-assessment documents, pension income proof, share dividend vouchers, company accounts, bank statements and proof of residence including council tax bills etc.);
- the School satisfying itself that the information given is accurate. The School may seek objective third-party confirmation of a family's financial circumstances (including from a credit reference agency); and
- a home visit from the School or its agents if the School deems this appropriate.

- 21) The School will not proceed with an application from anyone giving misleading, inaccurate or incomplete information

Existing Awards - Annual reassessment

- 22) Once awarded, the Assisted Place (as defined in the offer) normally applies for the duration of a pupil's School career. However, each Assisted Place holder will be issued with repeat means-testing forms at the beginning of April each year for return by the date indicated on the Means Testing Form. Continuation of the Assisted Place is conditional upon:
- full disclosure of information requested within the timescales given;
 - the School satisfying itself that the information given is accurate. The School may seek objective third-party confirmation of a family's financial circumstances (including from a credit reference agency); and
 - a home visit from the School or its agents if the School deems this appropriate.
- 23) The School reserves the right to withdraw an Assisted Place from anyone giving misleading, inaccurate or incomplete information.
- 24) In addition, the Headmaster also has the discretion to recommend the reduction or withdrawal of an award not only where a pupil's progress, attitude or behaviour has been unsatisfactory but also where the parents have failed to make timely payments of any contribution they are making to fees or extras.

The Application Process for New Pupils Reception to Year 6

- 25) If an applicant wishes to apply for an Assisted Place the following steps need to be followed:
- a) Parents must register for a place at the school and highlight interest in a Bursary.
 - b) The pupil completes and age-appropriate assessment of English and Maths.
 - c) If the pupil is successful, parents will then be asked to fill out the Means Testing Form and provide supporting documentation to confirm their income and assets. This will allow the School to confirm the fees payable for the year of entry as part of the Offer Letter.
 - d) If Parents decide to accept the place based on the confirmed fee, they are then required to sign the Terms and Conditions of the school. This includes the requirement for an annual review of their financial circumstances (see above). A deposit is required at this stage to secure the school place.
- 26) Forms and supporting documents should always be returned by the due dates given as delayed Assisted Place applications cannot be processed and you may then potentially forfeit your application.
- 27) In line with GDPR regulations, copies of supporting documentation for unsuccessful applications are destroyed as confidential waste, once the process has concluded.

Existing pupils: hardship Assistance

28) These may be offered to parents of existing pupils where a catastrophic change in financial or personal circumstances has created a difficulty in paying the fees. The school will set aside each year a Hardship fund and each case is reviewed and cannot be guaranteed. Such award is given for a maximum of two terms to assist with the change in circumstances.

Sources of Funding

29) Assisted Places are funded from three sources:

- Grants awarded by the Governors
- Grants awarded by the West House Old Boys
- Grant awarded by the Trustees of the Lillie C Johnson Charitable Trust

This policy is approved by the Governing Board and will be held on the school website.

Approved by West House Governing Body
25th March 2025

Assisted place: Conditions of Award

- 1 **Grant of the award:** An award is granted at the sole discretion of The School.
- 2 **Obligations of the Pupil:** The Pupil who is the subject of an award is required to work hard, to contribute positively to life at West House, to be a credit to the School and to set a good example to other pupils. The Pupil must adhere to the School's required standards of conduct and progress.
- 3 **Obligations of the Parents:** The Parents are required to support and encourage the Pupil to achieve the Purposes of the Award.
- 4 **Means tested awards:** All means tested awards will be subject to annual review and the Parents shall each year be required to complete a Means Testing Form. After any annual review, the School reserves the right to vary the value of the award with immediate effect in accordance with the Scales and will confirm the new value in writing to the Parents.
- 5 **Continuation of the award:** Continuation of the award is dependent upon the Parents satisfying the School's financial requirements each year.
- 6 **Confidentiality:** The value and terms and conditions of the award shall remain confidential to the Parents and the Pupil and the School.
- 7 **Termination of the award:** The award may be terminated on the following grounds:
 - 7.1 **termination on financial grounds:** the School may terminate the award on one Term's notice in writing if, in the opinion of the School Governors acting in good faith the Parents have not satisfied the School's financial requirements under clause 4 and 5.

The termination shall take effect from the date set out in the written notice;
 - 7.2 **termination on the grounds of conduct:** the School may terminate the award by written notice sent to the Parents with immediate effect if, in the opinion of the School Governors acting in good faith, one or more of the following conditions has been fulfilled:
 - 7.2.1 the Pupil has not complied with the obligations set and in the further opinion of the Governors there has been no significant improvement following consultation with the Parents and / or the Pupil and the issue of a written warning; or
 - 7.2.2 the Parents have not complied with the obligations set out in clause 3; or
 - 7.2.3 the Parents of the Pupil do not keep the value and terms and conditions of the award confidential in accordance with clause 6; or
 - 7.2.4 the Parents withdraw the Pupil from the School without providing proper Notice;
 - 7.3 **repayment of the award:** the Parents will be required to repay all or part of the benefits received under the award if it is terminated in any of the following circumstances:
 - 7.3.1 under clause 7.1 if the Parents have knowingly or recklessly provided false or inaccurate information about their financial position, all benefits received from the date on which the false or inaccurate information was supplied may be repayable; or
 - 7.3.2 under clause 7.2.1 if the Pupil has been found to have committed a serious breach or series of persistent minor breaches of discipline for which the sanction would normally be Permanent Exclusion or required Removal, up to three Terms' benefits (if received) may be repayable.
- 8 **Cancellation and Withdrawal:** For the avoidance of doubt, the benefit receivable under an award will not apply to the Parents' liability to pay the first Term's Fees if less than a Term's Written Notice of Cancellation is given, or to any Term for which the School requires payment of Fees in lieu of Notice following Withdrawal without proper Notice.

- 9 **Conditions of Award:** These Conditions of Award take precedence over any of the School's *Terms and Conditions* which are inconsistent with them but in all other respects the School's *Terms and Conditions* as amended from time to time shall apply and these Conditions of Award shall be interpreted in accordance with them.