ST WINEFRIDE'S SCHOOL
Founded 1868

St. Winefride's Bursary Policy

Mission Statement

Our aims are:

- **To educate the whole child in a caring and Christian atmosphere.**
- **To encourage our children to reach their full potential, mentally, physically, socially and morally.**
- **To emphasise kindness, care, unity and mutual respect.**
- **To promote an awareness of the need and religious beliefs of others. This will enable them to become responsible citizens and an asset in any community.**

General

The Board of Trustees of St. Winefride's are committed to broadening access to education at the school by offering to eligible parents means-tested financial support for the payment of school fees for as many pupils as possible who meet St. Winefride's entry criteria. Such support is known as a bursary. Bursaries may be awarded in the form of a discount of up to 20%, in cases of proven need, (and, where appropriate, in some certain circumstances, an allowance for other educational expenses such as school clubs, wrap-around care, school uniform or school trips), depending on the individual circumstances of the prospective pupil and each of his or her parents.

Bursary awards are subject to an annual review of the pupil's and his or her parent's financial circumstances, with fresh information being required about the pupil's parents' circumstances for every year that their child attends the school. Bursary awards may be removed or varied upwards or downwards, depending on the pupil's and parents' financial circumstances.

Awards are made on the basis of the confidential St. Winefride's scale of awards, which sets out award levels in relation to the child's and each parent's financial circumstances, as amended from time to time. The scale of awards is reviewed and revised annually by the the trustees. Though awards are generally linked to this scale, they may be varied upwards or downwards depending on the child's and each parent's financial 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 other factors).

Awards may also be varied upwards or downwards for compassionate or other pertinent reasons, including but not limited to a pupil's progress, attitude, attendance or behaviour; where the parents have failed to support the school or otherwise have not acted in accordance with their obligations under the school's Terms and Conditions, for example by the late payment of any contribution they are making to the fees; or otherwise in accordance with the terms of the award or the school's Terms and Conditions.

A bursary may be withdrawn in its entirety, in accordance with the terms upon which such an award is made, or otherwise in accordance with the School's Terms and Conditions. A bursary may also be withdrawn in its entirety if, in the opinion of the Head, the child's attendance, progress and/or behaviour (and/or the parents' behaviour or conduct (or the behaviour or conduct of one of the parents)) no longer merit the continuation of the award.

The School reserves the right to amend the way in which bursaries/awards are assessed.

Requests for financial support usually fall into two categories:

1.

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

2.

Within the second category there may be temporary arrangements dealing with the disbursement of “hardship” funds when local or national economic circumstances affect the income of school families.

New Applicants to the School

Awareness

Information provided by the school alerting parents of prospective pupils to the possibility of gaining means-tested financial support with the payment of school fees and other educational expenses is included in:

- The School’s prospectus.
- The School’s website.
- The School’s Admissions Policy and process.

The Application Process

Bursaries may be made available to parents of children entering any year group of **St. Winefride’s. (**See the school's Admission's Policy for further information on the School’s entry criteria). They are awarded at the discretion of the trustees and the Headteacher, who are responsible for the management and coordination of the process.

- Step one – both parents seeking a bursary are required to complete a form which seeks to establish the identity and financial circumstances of the family and of each parent. In the event both parents are separated and/or divorced, financial information from both parents should still be provided, as should the financial information of any other adults in the same household of either of the parent. The form, which requests details of income, savings 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 June in any year, for bursaries to start the following September.
- Both parents seeking a bursary will be required to sign a declaration stating that the information they have provided is both accurate and complete as well as requiring, in the event their application for a bursary is successful, them to update the school in the event those circumstances change during the academic year in question. If any information provided in the application, or as part of the broader assessment process, is subsequently discovered to be false or misleading or incomplete, the school may withdraw any award which has been made with immediate effect and, depending on the circumstances may require reimbursement. The School may also terminate its parent contract (Terms and Conditions) and require the removal of the child in such circumstances.
- Step two - the Headteacher, or their nominee, 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 a representative of the school visiting the parents' home(s) to ensure the information has been correctly interpreted and the basis of the financial assessment has been fair. Parents may also be asked to meet the Headteacher or their nominee at the School and/or provide additional supporting information as may be requested.

- Step three - the Headteacher, or their nominee, prepares a recommendation in accordance with the School's confidential scale of awards
- Step four - the recommendation is presented to the trustees for approval. The trustees may request further information to inform their deliberations.
- Step [five] - The parents are advised whether their child is to be offered a place at the school and of the bursary offer - both parents are then required to sign a letter accepting the place at the school and an acknowledgement agreeing to any additional terms and conditions relating to the bursary.

Note: St. Winefride's may use an external organisation to assist with processing bursary applications, including making home visits. Information provided by applicants may be made available, in confidence, to that organisation for those purposes.

All personal data processed in connection with the School's arrangements for bursaries shall be processed in accordance with the School's privacy policy.

The Case for Assistance

The Headteacher will consider a number of factors when making the judgement as to the justification for support and the extent of such support; inevitably this is a holistic judgment. 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 their academic assessment result's in accordance with the school's published entry criteria. Bursary funds are limited and those judged most suitable will be given priority as those likely to gain most from the school's educational provision. Each pupil to whom support is offered must, in the opinion of the head, be likely to make good 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. Previous school reports will be consulted for evidence of the pupil's attainment, progress and behaviour.
- Financial limitations - the amount of the bursary award is not influenced by the child's academic ability but by the extent of need. Each case is assessed on its own merits and awards are made 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 (but are not limited to):
    - The ability to improve the financial position or earning power of each parent. 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 property assets.
    - In cases of parents who are divorced or separated, the contribution that is being made or could be made by both parents, regardless of who the child lives with, and based on the principle that liability for the fees is joint and several. This means that the school may consider the financial circumstances of each parent separately and together, treating each parent's household separately.
    - [The number of school aged children in the household.]

    - Contribution to household costs including school fees by other family members, any adults unrelated to the child or by third parties / outside sources.
    - Any fees which are being paid to other schools (or universities).
    - Acknowledging that others might have a different view, the school considers that the following would not be consistent with the receipt of a bursary. It should be noted that the list is not comprehensive:
        - frequent or expensive holidays;
        - [new or] luxury cars;
        - investment in significant home improvements;
        - a second property/land holdings;
        - failure to honour school fee payments to other schools.
- Other factors - it is recognised that, in addition to meeting academic requirements and financial constraints, there may be other circumstances which should be considered as part of the school's holistic judgment. These include:
    - Where a child has siblings at the school (though a bursary award to one child does not guarantee an award to a sibling).
    - Where the social needs of the child are relevant (for example, where a child is suffering from bullying at their present school).
    - Where a parent is critically or terminally ill or is unable to secure permanent employment due to poor health or incapacity.
    - Where a separation has resulted or is likely to result in the child having to be withdrawn from the school, adding to the stress of coping with the parents separating, although the school will nonetheless consider the financial circumstances of both parents in such cases.
    - Where a previous school has awarded bursary support (but please note that bursary support from a previous school is no indication or guarantee that the parents would be eligible for bursary support at [*name of school*].

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 bursaries. This sum will be set within budgetary constraints. Parents with a child at the school whose financial circumstances suddenly change may apply for a hardship award to the [*head*][*bursar*], explaining their situation and using the forms at Annex A. Such awards are subject to the availability of funding and cannot be guaranteed.

If parents continue to require financial support in subsequent years, they will be required to submit repeat means-testing forms in the same way as other bursary holders.

Annual Review

All bursary awards are subject to repeat consideration of the child's and each parent's financial circumstances each year and may be varied upwards or downwards depending on the outcome of any review. Current bursary holders will be issued with repeat means-testing forms at the beginning of June each year, for return by the end of June. Bursary holders will usually be advised of the outcome of the annual review by the end of July.

For those previously in receipt of bursaries, the Headteacher, in making their recommendation to the trustees, will have the discretion to recommend to the trustees the reduction or withdrawal of an award not only where a pupil's progress, attitude, attendance or behaviour has been unsatisfactory but also where the parents have failed to support the School - for

example, by the late payment of any contribution they are making to the fees or by otherwise not acting in accordance with the school's Terms and Conditions, or otherwise in accordance with the terms of the award or the school's Terms and Conditions.

Confidentiality

The School respects the confidentiality of bursary awards made to parents and recipients and prospective 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. St. Winefride's encourages parents 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 Educational Trusts Forum:

Website: www.educational-grants.org

Royal National Children's Spring Board Foundation:

Website: https://www.royalspringboard.org.uk/

Annex A. Means testing guidance and forms.

Updated and reviewed: September 2026

The next review date for this policy: July 2027

Annex A

CONFIDENTIAL WHEN COMPLETED

St Winefride's RC Independent School Bursary Means Testing Form

Confidential Statement of Financial Circumstances in support of an application for a Bursary

Please read the Notes for Guidance before completing this questionnaire

[This questionnaire is based on a template recommended by the Independent Schools' Bursars Association]

1. CHILD		
a	Full Names	
b	Date of Birth	
c	Term/Year of Entry	

2. PARENT CONTACT DETAILS (see note)			
		Parent 1	Parent 2
a	Names		
b	Title		
c	Address		
d	Post Code		
e	Day time Tel		
f	Evening Tel		
g	Mobile		
h	Fax		
i	E-mail Address		

3. PARENTS' OCCUPATIONS			
a	Employed (insert employer's name, address and phone number)		
	Are you a Director or Shareholder or Proprietor of this Company?	Yes / No	Yes / No
	If "YES" state proportion of Company or Business you and/or your spouse/partner own		
b	Self-employed (complete type of business) / partner in partnership		
	If a partner, state your share of partnership income and capital, if any		
c	Unemployed		
d	Retired		

4. INCOME (see note)*(Please enter below your current earnings and expected income from all sources for this tax year)*			
		Parent 1	Parent 2
a	Gross Salary and other emoluments (including all taxable benefits & expenses) for the year to 5th April 20[ ]		
b	Taxable profits of trade or profession for last two tax years	(i). (ii).	(i) (ii).
c	Gross pension, widow's pension, State pension etc		
d	Gross investment income from:		
	• Building Societies /Banks		
	• Dividends and interest (other securities)		
e	Gross rental profit		
f	Social Security benefits (including Child Benefit and Child Tax Credits)		
g	Separation or Maintenance Payments		
h	Is there a Court Order/Separation Agreement? If yes, please state annual amount payable for school fees.	Yes/No	Yes/No
i	Benefits in Kind provided free by reason of employment not already included in (a) above		
j	Any other income or gains not included in (a) to (i) above e.g.: trust or estate income, gains on sale of capital assets, surrenders or maturity of life assurance policies, royalties etc		

k	Please enclose a copy of your self assessment tax calculation for the previous year.		

5. OUTGOINGS (see note)			
a	Tax payable on Incomes declared above *(including tax deducted at source)*	(i) (ii)	(i) (ii)
b	National Insurance Contributions		
c	Pension or superannuation contributions (net)	(i) (ii)	(i) (ii)
d	Mortgage repayments *(include capital repayment as well as interest)*	(i) Interest (ii) Capital	(i) Interest (ii) Capital
e	Endowment mortgage insurance		
f	Any other interest payable e.g. overdrafts, credit cards, loans, etc *(please specify)*		
g	Annual rent payable on principal residence		

6. CAPITAL ASSETS (see note**)**			
		Parent 1	Parent 2
a	Approximate market value of all investments		
	• Building Society/Bank deposits/National Savings accounts		
	• Equity investments (shares, unit trusts), Corporate bonds and other securities and Government stocks		
	• ISAs		
	• Life assurance bonds and policies including endowments		
b	Approximate market value of principal residence *(freehold or leasehold)*		
c	Approximate market value of other possessions including house contents, car, collections, paintings, jewellery etc		
d	Cash at banks or elsewhere*(current accounts only)*		
e	Approximate market value of any other assets *(please specify and include the market value of any Insurance Policies maturing in this tax year or the last five years)*		
f	Net worth/value of any businesses which you own or share		
g	Approximate market value of your interest in any other property, land or buildings either at home or abroad		
h	Redundancy or other termination payments		

i	Monies that are owed to you		
j	Other assets not listed e.g. share options, trust interests/assets held on your behalf by a third party, assets likely to be received in the foreseeable future etc		

7. CAPITAL LIABILITIES (see note)			
		Parent 1	Parent 2
	(Please give details of any capital charges against the assets declared in Section 6)		
a	Mortgage Details		
	• amount outstanding on principal residence		
	• a final payment date		
b	Outstanding school fee payments or charges		
c	Other liabilities *(please specify)*		

8. NET ASSETS			
	TOTAL ASSETS (6)		
	LIABILITIES (7)		
	NET ASSETS (6-7)		
	Please explain any reasons why net assets cannot be converted or utilised to pay school fees.		

9. DEPENDENT CHILDREN (see note) *(Include the child to whom this application refers: if more than 4 children, give details on a separate sheet)*					
		1	2	3	4
a	Forename				
b	Date of Birth				
c	School or College				
d	Boarding or Day				
		£	£	£	£
e	Annual school or other educational fees *(excluding extras and supplemental charges)*				
f	Compulsory additional school charges				
g	Amount of fees shown in (e) covered by:				
	• Scholarships, Bursaries or other allowances given by school				
	• Annual sum arising from capital repayment scheme				
	• Services/Diplomatic/ Company Education Allowances (gross) *(state whether sum has been included in gross salary at 3 (a))*				
	• Annual sum arising from Educational Insurance Policies				
	• Assistance from any other sources e.g. Grandparents, trusts, charities, etc *(please specify)*				
h	• Annual income of child *(if any)*				
	• Capital Value of Trust				

10. OTHER DEPENDENTS (please give details) (see note)

11. VERIFICATION OF INCOME Please enclose documentary evidence in support of the income figures in Section 4. Please tick those you are enclosing:

P60 and P11D	Copy of HMRC tax calculation issued under Self Assessment
March Pay Advice	Confirmation of Schedule D self employment income from an independent accountant
Annual Report & Accounts (including Balance Sheet) for the years 20[ ] & 20[ ]	
Others *(please specify)*	e.g. copies of dividend vouchers, bank interest certificates
Court Orders and Legal Separation agreements	Covering the payment of school fees and child maintenance
Benefits received	Universal Credit, Social Security Benefit, Housing Benefit, Job Seekers' Allowance, Employment & Support Allowance, Income Support, Disability Living allowance, Incapacity Benefit, Child Benefit

12. VERIFICATION OF ASSETS Please enclose documentary evidence of capital assets and tick those you are enclosing:

Property Valuation	£	Investment Portfolio Valuation	£
Mortgage Statement	£	Contents Insurance	£

13. HOME VISIT(S)

The School may wish to visit your home address(es) to discuss your application for support. Both parents should please indicate whether you are happy to receive a visit from the school's representative.	Yes/ No (Delete as appropriate) NAME: Yes/No (Delete as appropriate) NAME:

ASSISTANCE FROM OTHER SOURCES

In order to help the greatest number of parents who need financial assistance, all those who apply for a bursary from the school are asked first to enquire if they are eligible for assistance from any other source, including family members, family friends, relatives, employers, charities, trusts, and foundations.

Please state whether you have applied to trusts or foundations for a grant, and if so to which and with what result. Please also state what steps you have taken to obtain assistance from any other third party.

ANY ADDITIONAL INFORMATION

14. DECLARATION

After having read the attached notes, the following declaration should be signed by both parents (or see below):

We have read the notes and have made a complete and accurate declaration of our income and assets.

We understand that if we are offered a bursary for our child and accept a place for him/her at the school, the following terms and conditions will apply as between ourselves and the School:

a) our child's fees account with the School will be credited termly with the amount of the bursary for so long as the award remains in effect;

b) any award of a bursary is subject to annual review and we must complete an annual declaration of our financial circumstances on the form sent to us by the School and supply all relevant supporting evidence by the return date indicated;

c) we will report immediately any material change in the financial position declared;

d) the Grant may be withdrawn or reduced if:

i) we act or our child acts in breach of the School's Terms and Conditions attached to the Acceptance Form for our child at the

school or in breach of the terms of the bursary award;

ii) we have failed to return the annual declaration of our financial circumstances by the return date indicated;

iii) we have failed to produce any additional information required by the School to evidence our financial circumstances;

iv) in the opinion of the Head, our child's attendance, progress, attitude or behaviour no longer merits the continuation of the award;

v) we are more than 28 days in arrears in respect of any amount due and owing to the School;

vi) there is a material change in our financial circumstances;

vii) the School's resources are insufficient to maintain the level of award,

e) **IMPORTANT** - the bursary will be withdrawn with immediate effect and the value of any amount of the bursary previously credited against our child's fee account will become repayable to the school forthwith as a debt if we/I have fraudulently, knowingly or carelessly provided false or misleading information in relation to the award of the bursary; and

f) as otherwise stated in the school's Terms and Conditions as amended from time to time.

Signatures: (See note on Parents)

Parent 1

……Date ……

Parent 2 …….....Date.....

[NB. Each person with parental responsibility for the child is required to sign this form and, where the parents do not live together in the same household, should provide the requested information in respect of their own household's circumstances]

NOTES FOR GUIDANCE FOR COMPLETION OF BURSARY APPLICATION FORM

Before completing the form, please read these notes carefully, and contact the Bursar if further information or advice is required. These notes refer to the corresponding paragraph on the Form.

The school reserves the right to seek any other documentary evidence in support of the income and asset figures submitted, and to make enquiries which it deems necessary.

All financial values should be shown in Sterling. References to Her Majesty's Revenue & Customs (**HMRC**) include the relevant national Taxation Authority.

SECTION 2:. PARENTS

The form should be completed by all holders of parental responsibility for the child.

As responsibility for payment of the fees is in most cases 'joint and several', where both parents do not live together in the same household, each parent should complete the form with full details of their own financial circumstances and the circumstances of their own household. Please err on the side of caution and provide as much information as possible.

Please contact the Bursar if you are unsure who should complete this form or have questions about whose financial circumstances should be included.

SECTION 4: INCOME

a) The gross annual amount of salaries and wages, including any earnings from profit related pay, part-time employment and any sum received as bonus, commission etc, statutory sick pay, statutory maternity pay giving GROSS amounts (before deduction of tax, NI, superannuation, etc) for the current or latest financial year. Taxable benefits in kind agreed with HMRC should also be shown (free or subsidised housing, meals, petrol, cars, etc) - at the amount agreed for taxable purposes.

b) Profits from a business or profession - at the amount of GROSS income declared to HMRC or relevant tax authority for the year in question. Copies of the latest set of accounts should be included. Where the profits assessed relate to a basis period in excess of or less than 12 months please state the length of that period.

d) All other Investment income (e.g. interest or National Savings Bank deposits; dividends, annuities etc) should be entered GROSS of tax. If tax was deducted at source, parents should add in the amount of tax paid or tax credit notified. Building Society interest must be disclosed GROSS.

e) Enter income from letting or subletting of property at the amount of the profit declared to HMRC; net of related expenditure before tax.

f) All social security benefits received should be declared and type of benefit specified.

h) Court Orders, Legal Separation Agreements and Voluntary Arrangements for School Fees - Where a parent is required by a Court Order, or a legal binding separation agreement (e.g. Deed of Separation) to pay part of the School fees, then only that part of the fee which is not covered by the Court Order/agreement will be used to calculate any bursary to be awarded. This is irrespective of whether or not the order or agreement is being complied with. Where the whole amount of the fees are required to be paid by virtue of a Court Order or separation agreement, applicants are not eligible for a bursary. You should indicate how many years are payable and any annual variations. All receipts relating to maintenance payments, separation allowances and sums in respect of Child Support maintenance must be declared.

i) Include free benefits in kind agreed by HMRC as not subject to tax, e.g. representative occupation of house, free canteen.

SECTION 5: OUTGOINGS

a) Enter tax on earned and unearned income SEPARATELY.

c) Enter annual superannuation contribution of (if applicable) payments to other Pension Schemes SEPARATELY.

d) Enter capital as well as interest payment on a mortgage for the principal residence.

e) Only complete this if repayment is effected by means of a full Endowment Policy.

f) Include bank overdraft and other loan charges incurred during the year (specifying the purpose of the loan).

SECTION 6: PARENTS'/APPLICANTS' CAPITAL ASSETS

In addition to taking account of all relevant sources of income, the school takes account of the following assets:

a) The capital sum of any monies on deposit with any bank, deposit taker or building society. Investments in stocks and shares, valued as near as possible to the date of submitting the application form.

b) The current market value of your principal residence as provided by [two] estate agents. The current market value should be estimated by parents where a current valuation is unavailable, with the reason provided as to why such a valuation is unavailable.

f) If you run your own business or are partners in a business, then you should show the net worth of the business. Shares in a company not listed on a stock exchange should be valued at the relevant proportion of the net value of the company.

g) In the case of second homes and/or other properties, these should also be included at their estimated current market value; no allowance will be made for any outstanding mortgage.

SECTION 7: PARENTS'/APPLICANTS' CAPITAL LIABILITIES

Details should be provided of any outstanding school fee payments or charges and any arrangements entered into with the relevant school in respect of payment

Details of other liabilities should be provided along with the lender.

SECTION 9: DEPENDENT CHILDREN

Use column number 1 for the child for whom you are now applying at his/her current school rate. Enter in other columns any other of your children who are unmarried and at a school, university or other educational institution.

f) The figures to be inserted here refer to the current academic year.

g)(iii) Members of HM Forces and Diplomatic Service should include the amount of any Education Allowances which they receive. Parents in other occupations should include any similar sum

(iv) Insurance Policies for School Fees - If any insurance policy for the payment of School fees exists, then the amount declared is the amount receivable under the policy for the academic year for which the application is being made. If the insurance policy covers the full cost of the tuition fees, then the pupil is not eligible for a bursary. The types of policy concerned are those which stipulate that the company shall

pay the school fees, in whole or in part, to the school in respect of the pupil.

(v) Where a Trust has been established in favour of the child for whom you are applying, details of the annual amount available and the date of commencement of payment from the Trust should be given.

h) Where the child has any unearned income, e.g. interest from National Savings, bank or building society deposits, or receives share dividends, you should enter the source of income and the gross amount received before deduction of any tax. Do not include any income from part time employment or student grants. You should enter the capital value of any beneficiary or other trust set up for each child.

SECTION 10: OTHER DEPENDENTS

If you qualify for a Carer's Allowance, or have an aged grandparent or relative living with you or dependent upon you, please provide details including age, address, condition, etc.

ANY OTHER RELEVANT INFORMATION

Please enter, on a separate sheet if necessary, any details which may affect the assessment of a bursary, e.g. a known significant change in income or outgoings for the coming year.

CONFIDENTIALITY

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