

WINCHESTER COLLEGE

GUIDANCE ON BURSARIES

1. The Founder's Intention

Winchester College has been providing education and financial support for over 600 years. A core element of the school's ethos has always been and remains to attract boys who can best benefit from a Winchester education regardless of their parents' ability to pay.

William of Wykeham founded Winchester College in 1382. He rose from modest social origins to become Bishop of Winchester and Lord Chancellor. Wykeham left the wealth he had acquired for the provision of an education of a kind he himself had not been able to experience.

Wykeham gave the distinctive motto: **Manners Makyth Man** to the College. Deliberately expressed in the vernacular, rather than in the languages of the court or church, this adaptation of a contemporary proverb expresses two of Wykeham's guiding principles: first, commitment to wider society and to mobility within that society; and second, the provision of a holistic education, productive of character as well as intellect, of broad personal virtues and sympathies, rather than narrow intellectual or social judgements.

William of Wykeham was a man with a purpose. His original Foundation provided for the education of seventy Scholars, just as there are in College today. While academic scholarships continue to be awarded on merit (together with music and sports scholarships), they no longer attract automatic fee remission. Today, the school educates 700 boys and broadens access by offering eligible parents means-tested financial support with the payment of school fees. Such support is known as a bursary.

2. Availability of bursaries

The school is committed to maintaining the founder's original intention and provides support to boys who would benefit from it and whose parents would not otherwise be able to afford school fees in full or in part. The school supports as many applications as it can.

Each year the school provides financial support to 125 or more pupils at a cost of over £3.5 million, equivalent to 85 full fees. Nearly one in five pupils in the school receives bursarial support.

Individual bursaries vary between 5% and 100% of school fees payable, depending on the level of financial assistance needed. For those on the largest bursaries, this may include additional support for books, equipment, exam entry fees and educational visits.

Although the school is able to offer a large number of bursaries, at present it receives more requests for bursarial support than it can meet. The funding available is insufficient to allow the school to satisfy all applications received. Although we are working hard to increase the school's capacity to award bursaries, the level of bursaries that can be offered each year is fixed and finite.

Inevitably, this involves difficult decisions and some applicants may be disappointed. Each year the school has to refuse 1 in 4 applications received, even though the applicant would qualify for support in other circumstances.

Please note that the school makes its decisions to offer provisional places in the school before parents' need for financial support with school fees is assessed. Parents who will need bursary support should be aware that the offer of a place at the school does not

guarantee bursary funding. If it is unable to offer parents a bursary, the school reserves the right to withdraw the provisional offer of a place where it is apparent that the school fees cannot be afforded without financial assistance.

Where demand for bursaries exceeds the funds available, the school will offer bursaries sufficient to enable the pupil to come to the school to as many of the applicants as funds allow. It does not scale back all applications and expect parents to fund the shortfall. Preference will be given to those judged likely to gain most from a Winchester education and to contribute most to the school.

To the extent the school grants an award to a boy who does not need it, it deprives another boy of the chance of a Winchester education. By applying for a bursary parents are entering into a special relationship with the school. The school asks you to respect that spirit and apply in the utmost good faith.

3. Who can apply for a bursary?

Prospective parents, who are unable to fund school fees (in full or in part), must apply for a bursary as soon as their son receives an offer of a provisional place at the school. The school's practice is to allocate its entire available bursary funding at that time. The school's expectation is that parents who do not apply for a bursary at that time will not require financial support throughout the time that their son attends the school and it will not entertain subsequent bursary applications from parents, except in the most exceptional and wholly unforeseeable circumstances. Further guidance for parents of existing pupils who fall into financial difficulty is available upon request.

4. Further information about bursaries

Information about bursaries is included in the school's Admissions information and on the school's website. Further information and application forms may be obtained from:

Bursary administration team: bursaries@wincoll.ac.uk or

Bursary Accountant: Mr M Williamson on 01962 621138 or at mrw@wincoll.ac.uk

Both at: Winchester College, College Street, Winchester, Hampshire SO23 9NA.

5. How to make an application

Please be advised that this guide is intended solely as general guidance to help parents understand the school's approach to bursary awards. It is not intended as a detailed set of rules which the school follows without deviation. Each family is assessed individually on its merits.

Bursaries are awarded solely at the school's discretion.

The Bursary Accountant manages and coordinates the process.

The Bursar, advised by the school's Bursary Advisory Group, currently comprising two Fellows (i.e. governors of the school), Headmaster and Registrar, decides awards. The Bursary Advisory Group may consult such others, including housemasters, as it sees fit.

Bursaries are awarded on the basis of a sliding scale, which sets out award levels in relation to a family's financial circumstances. Though awards are generally tied to this scale, they may be varied upwards or downwards depending on individual parents' circumstances (e.g. their

savings, investments and realisable assets as well as their income, the size of their family and any other persons dependent upon them and like factors), and compassionate or other pertinent considerations.

All prospective parents who wish to apply for a bursary for their son must submit an Application Form. This is designed to understand the level of support required and why that support is needed. The Form requests details of:

- family circumstances;
- family finances, including income and expenditure, and assets and liabilities;
- the level of support required, the reasons why a bursary is needed and the measures the family has taken to find alternative sources of funding, including from other family members.

The Bursary Application Form is necessarily searching and the school makes no apologies for that. All sections of the Form must be completed in full and in detail, and the Form must be accompanied by full documentary evidence in support of the application.

The Application Form should be completed by all those with parental responsibility for the pupil. Where parents are separated, each may complete a separate form.

An application will not be accepted if the Application Form or documentary evidence is incomplete.

All applicants must make full disclosure of their financial position, including income, assets and family support, and will be required to sign a declaration stating that the information provided is both accurate and complete. If the information provided is subsequently discovered to be incomplete, false or misleading, the school will withdraw the bursary award.

All parents applying should expect to take part in a home visit by a representative of the school, who may be a current or former member of staff or an outside organisation retained by the school for the purpose. To be clear, the school will not offer a bursary if parents do not agree to and cooperate with a home visit, where requested.

Parents may also be asked to meet the Bursar and/or Chief Accountant at the school.

At present the school uses an external organisation called Bursary Administration Limited to assist with processing bursary applications and make home visits. Information provided by applicants, including the Bursary Application Form and supporting documents, which may possibly include sensitive personal data, will be made available, in confidence, to that organisation for those purposes. The school remains the data controller of the data and has entered a data processing agreement with that external organisation.

Bursary funds come from the school's own endowments. Some of this funding comes from donations. Some donors like to hear about the progress of pupils whom their gifts are supporting and so the school provides them with reports. Where this occurs, it is the school's policy to make parents aware both of the name of the award and of that reports are made. To be clear, no donor has any involvement or influence in deciding bursary awards. Should you wish to know more about this, please contact the Bursary Accountant.

6. Factors in Assessing Applications

Bursaries are awarded solely at the school's discretion.

The description that follows is not intended to be prescriptive. The school reserves the right to approach each case flexibly according to the specific circumstances.

The Bursar will consider a number of factors when assessing whether support might be available, and if so, the extent of such support. In the main this will be determined by the boy's suitability for the school, parents'/guardians' financial circumstances, and the level of funding available.

- **Suitability:** Each boy to whom support is offered must meet the school's admission criteria. In addition to making sound academic progress following admission and possessing the potential to develop the quality of his work, each such boy must be likely to benefit from participation in the wider extra-curricular activities on offer at the school and play a full part in the life of the school. Bursary funds are limited and those judged most suitable will be given priority as those most likely to gain from the school's provision. Preference will usually be given to Scholars and holders of Music and Sports awards.
- **Financial Limitations:** The amount of the bursary award is influenced by the extent of need rather than the level of the academic performance. 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 the school will have to make judgements about what sacrifices a family should make to pay school fees. However, the school endeavours to ensure that all bursary awards are consistently assessed and applied. As well as an assessment of current income, outgoings and assets, other factors which may be considered in determining the necessary level of grant 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.
 - Future changes in the family's circumstances. For example, if a parent will be promoted or start a new, more highly paid job, or the family is expecting a windfall.
 - Opportunities to release any capital. The school expects significant capital savings and investments, including second homes and buy-to-lets, to be used for the payment of school fees, as it would equity values in houses.
 - In cases of separation, the contribution that is being made or should be made by the absent parent.
 - Contribution to household costs including school fees by other members of the wider family, any adults unrelated to the child or by outside sources.
 - Whether fees are being paid to other schools or universities. The school expects that, wherever possible, parents will apply to these other schools and universities for financial assistance for siblings so that the burden of fees is shared among these organisations.
 - Choices in the use of family income and assets. The school expects families to give priority in the use of available resources to school fees over other expenditures. The school considers that the following, for example, may not be consistent with the receipt of a bursary:
 - Substantial and/or non-contractual pension contributions.
 - Substantial and/or non-contractual mortgage payments, especially accelerated capital repayments.

- Substantial rental payments.
- Voluntary surrender of paid employment in favour of business start-ups or extended retraining.
- Use of capital for purposes other than school fees.
- Self-impoverishment, for example, by giving away assets or selling them at an undervalue.
- Acknowledging that others may have a different view, the school considers that the following, for example, may not be consistent with receipt of a bursary:
 - Frequent or expensive holidays.
 - 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 financial matters, there may be other circumstances, which may be considered. These include:
 - Where a boy has siblings at the school (though a bursary award to one child does not guarantee awards to siblings).
 - Where the social needs of the boy are relevant.
 - Where a parent is critically ill, or is unable to secure permanent employment due to poor health or incapacity.
 - Where a separation might result in the pupil having to be withdrawn from the school, adding to the stress of coping with the parents separating.

7. The application process

(a) For those applying for a place for entry at age 13

All awards are contingent upon a satisfactory performance in the general entrance examination (“Entrance”) or scholarship examination (“Election”).

The school will adhere strictly to stipulated closing dates.

- (i) Parents must indicate on the Registration Form whether or not they intend to seek bursary assistance.
- (ii) Parents who will need a bursary must submit a Bursary Application Form **not later than 31 January** (and preferably before that date) to be reviewed as part of the Assessment Stage 2 which takes place between January and March of Year 6.
- (iii) The Bursary Accountant will consider the application and prepare recommendations.
- (iv) All applicants will be subject to a home visit by a representative of the school (see Section 5 above) and may also be asked to meet the Bursar at the school.

- (v) The Bursar will inform parents of the value of any award by the end of the May in conjunction with the offer of a place.
 - (vi) Parents offered a bursary will be required to sign a letter accepting the offer and any conditions related to the bursary. Parents who subsequently rescind the offer of a place as a result of this decision will have their Acceptance Fee reimbursed, providing this notice is received within 30 days of notification of the award.
- (b) For those taking the scholarship examination (Election) (without already having a House or General Place)
- (i) Parents must submit a Bursary Application Form together with the relevant main application form by the specified closing date for entry to College (Election).
 - (ii) The Bursary Accountant will assess applications as in the process set out above.
 - (iii) The decision will be communicated in good time. Where practicable, the school will endeavour to notify parents of the level of award, if any, at the same time as the results of their entrance application.
- (c) For those or applying for a Sports or Music Award (without already having a House or General Place), or admission into the sixth form
- (i) Parents must indicate on the application form whether or not they intend to seek bursary assistance.
 - (ii) Parents of shortlisted candidates, who have indicated that they would require assistance with the fees, will be sent a Bursary Application Form. This must be completed and returned by the deadline specified. This will usually be within between two and four weeks of notification that their son has been shortlisted.
 - (iii) The Bursary Accountant will assess applications as in the process set out above.
 - (iv) The decision will be communicated in good time. Where practicable, the school will endeavour to notify parents of the level of award, if any, at the same time as the results of their entrance application.

8. Annual Review

All bursaries are conditional on good conduct and continuing good performance of the recipient.

All awards are reviewed annually and are subject to repeat testing of parents' means each year. They may be varied upwards or downwards, or even withdrawn altogether, if parents' circumstances change. However, where a bursary is awarded to a new entrant to the school, parents can assume that the level of bursary award will not change from year to year, provided that their financial circumstances do not change.

All bursaries will be reassessed in detail before a pupil enters the Sixth Form and cannot be carried through to the Sixth Form unless a pupil has met the minimum academic promotion requirement and has consistently made a good contribution to the school's co-curricular programme.

The Bursary Accountant will contact existing bursary holders in January each year with details of that year's review. The results of the review will normally be advised by the end of that term.

The Bursar has the discretion, after consultation with the Bursary Advisory Group, to reduce or withdraw an award not only where a pupil's progress, attitude or behaviour has

been unsatisfactory but also where the parents have failed to support the school, for example by the late payment of their contribution to the fees.

9. Confidentiality

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

It is not the school's policy to tell pupils that they are receiving a bursary, nor to identify bursary award holders to any other pupil. Parents are welcome to tell their child.

10. 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 who due to a change of circumstances may be unable to remain in that school. Winchester College encourages parents/guardians to apply for support where it is felt a good case can be made for assistance.

Further advice and information may be obtained via The Educational Trust Forum website (<http://educational-grants.org/>).

Paresh Thakrar
Bursar
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