



Twyford School

Twyford

Winchester

Hampshire

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Tel: 01962 712269

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Bursary Policy

Twyford School

21 April 2008

Twyford School

Bursary Policy

Authority and Circulation

1. This policy has been authorised by the Governing Body of Twyford School ("the School"). Its status is advisory only. It is addressed to parents of pupils and of prospective pupils and to all members of the teaching and administration staff.
2. This policy contains an overview of the Bursary Scheme currently in operation at the School. The policy, together with all ancillary documentation including a financial means questionnaire, is made available to all parents and prospective parents on request.

Aims

3. The aims of this policy are:
 - 3.1. to widen pupil access to the School and ensure that a Twyford education is provided to children from a broad spectrum of society;
 - 3.2. to meet and if possible exceed the Charity Commission's public benefit requirements applicable from time to time;
 - 3.3. to work in conjunction with appropriate educational charities such as the Joint Educational Trust (JET) and other appropriate authorities such as Hampshire County Council and local schools to consider pupils who have been referred to Twyford by them, and to widen access to other independent schools for children who may not thrive at the School.

Introduction

4. The School is a registered charity that is committed to providing significant public benefit. The School is aware of its obligations under the Charities Act 2006 and seeks to adhere to the public benefit principles identified by the Charity Commission. This policy is reviewed on an annual basis to take into consideration the latest guidance from the Charity Commission and any other factors relevant to this policy.
5. The School's Bursary Scheme covers **Admissions Bursaries** for the parents of new pupils. The Scheme is designed to assist parents or prospective parents on low incomes¹ who for financial reasons might otherwise be unable to send their child to the School. Referrals for assessment for Bursaries from suitable educational charities such as JET and other appropriate authorities such as Hampshire County Council and local schools for children of other ages may be considered.
6. Bursaries are entirely means tested and are awarded on an annual basis to parents who are financially eligible and who meet the application requirements set out below in full. Due to the limited financial resources of the School not every eligible application for a Bursary will be successful.
7. All Bursary applications are treated in the strictest confidence. Pupils will not be made aware that they benefit from a bursary unless informed by their parents.
8. It is intended initially to offer 2 Bursaries per year for children entering Year 7 and continuing into Year 8, and it is intended that those children be weekly boarders. These Bursaries will offer 100% remission of tuition and weekly boarding fees plus an allowance for appropriate extras and initial uniform.

¹ The definition of 'low income' is subject to further guidance from the Charity Commission. Until this is received, the working definition is 60% of average income (£17,000 in 2006).

Publicity

9. We view a socially diverse pupil population as a key component of a full and balanced education. The availability of Bursaries at the School is advertised locally and with appropriate educational charities such as JET.

Eligibility and Procedure

10. All parents and prospective parents of pupils at the School are eligible to apply for a Bursary, and should contact the Registrar at the School office in the first instance for more information.
11. All applicants for an Admission Bursary are required to complete a means questionnaire. The questionnaire is designed to provide a full picture of the income and assets of applicants so that the School's Bursary Committee can determine those to whom an offer of a Bursary would be most beneficial. Please note that families who may be classified as 'low income' but have substantial assets may be ineligible to receive a Bursary.
12. In order to have their application for a Bursary considered by the Bursary Committee, parents must complete the questionnaire and provide the Bursar with any supplemental information that is requested. It is critical that parents answer all of the questions carefully and in full. All Bursaries are subject to an annual means-test review. Nevertheless, should any of the information disclosed in response to the questionnaire become inaccurate at a later date, the School must be informed without delay. Failure to divulge requested information or a change in circumstances to the School could lead to a Bursary being withdrawn or withheld.
13. Home visits to applicants by members of the Bursary Committee to confirm personal circumstances will normally be undertaken. Failure to agree to a home visit will require that the application for a Bursary be withdrawn.

The Bursaries

14. The deadline for Admissions Bursary applications is 30 June for 2008 and thereafter 28 February in the year of entry.
15. Admissions Bursary applications are considered by the Bursary Committee during the Spring Term. The Head will notify applicants of whether they have been successful by letter within 30 days of the deadline. Successful applicants will be sent a letter of offer specifying the conditions of award and requiring them to complete and sign an acceptance form.
16. The School can, however, accept referrals for Bursaries for assessment from suitable educational charities such as JET, and other appropriate authorities such as Hampshire County Council and local schools, at any time. The School's decision would depend on suitability and availability of both places and Bursary funds.
17. All Bursaries are awarded for one academic year and remain subject throughout that period to the conditions of award provided with the letter of offer.

Authorised by	THE BOARD OF GOVERNORS
Date	21 April 2008

Effective date of the policy	21 April 2008
Circulation	Governors / teaching staff / all staff / parents of pupils and of prospective pupils [on request] / appropriate charities and authorities
Status	Advisory. This policy will be reviewed periodically and at least annually



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Confidential Means Questionnaire

[Name of parent]

[Date]

Twyford School

Confidential Means Questionnaire

Please make sure that you answer all of the questions below as fully as you can before signing the declaration and returning the completed questionnaire to the Bursar.

A Personal details

Child

Child's Full Name:	Date of Birth:
Name Generally Used:	Date of Entry:

Parents

Parent/Guardian 1	Parent/Guardian 2
Name in Full (Including title) (Please include all names)	Name in Full (Including title) (Please include all names)
Date of birth	Date of birth
Relationship to the Child	Relationship to the Child
Address	Address (if different)
Postcode	Postcode:
Contact Telephone No	Contact Telephone No:
Fax	Fax
Mobile	Mobile
Email	Email
Occupation	Occupation
Employment Status	Employment Status
Employer / Business	Employer / Business
Address	Address
Telephone	Telephone
Fax	Fax

B Income

	Parent/Guardian 1	Parent/Guardian 2
Net monthly salary		
Interest on savings		
Dividends from shares		
Rent from owned property		
Pension		
Maintenance Allowance		
Social Security Benefits		
Money from second job		
Money from others in household		
Income Support		
Jobseeker's allowance		
Family credit		
Any other sources of income		
Total		

C Outgoings

	Parent/Guardian 1	Parent/Guardian 2
Mortgage payments on principal residence		
Rent on principal residence		
Pension contributions		
Life Policy		
Loans		
Income Tax		
Total		

D Capital Assets

	Parent/Guardian 1	Parent/Guardian 2
Property		
Market value of principal residence		
Freehold or leasehold		
Market value of other properties (including any abroad)		
Car(s)		
Investments		
Bank/Building society deposits		
Shares		
Individual Savings Accounts		
Cash		
Current Accounts		
Savings Accounts		
Redundancy payments		
Total		

Totals	Parent/Guardian 1	Parent/Guardian 2
Assets		
Liabilities		
Net Assets		

E Documentation

Please indicate which of the following documents have been provided to support your application:

	Parent/Guardian 1	Parent/Guardian 2
Income		
Payslips		
P60		
IR Tax calculation (self-assessment)		
Others		
Assets		
Mortgage Statement		
Property Valuation		
Investment portfolio valuation		

F Declaration

I/We confirm that I/we have answered all of the above questions in full and that should any material change occur to our financial circumstances that I/we will inform the bursar immediately.

I/We understand and agree that the award of a bursary is dependent on:

- the pupil working hard, contributing positively to the life of the School and setting a good example to other pupils;
- parental support of the pupil to achieve the purposes of the award and to uphold the good name of the school;
- payment of the balance of the account before the first day of term.

I/We understand and agree that the bursary may be withdrawn if:

- we have provided incomplete or false information, whether recklessly or knowingly;
- we fail to report any material change in my/our circumstances in full immediately;
- we fail to produce documentary evidence supporting any of the information disclosed;
- our child falls below the required standards of conduct or progress and in the opinion of the governors there has been no improvement following consultation with the parent and pupil and a written warning.

I/We understand and agree that I/we shall be required to repay all or part of the bursary if:

- our child has engaged in serious misconduct or has been expelled or removed for reasons of misconduct;
- our child is withdrawn from the school for any reason without a term's written notice having been given.

	Parent/Guardian 1	Parent/Guardian 2
Signature		
Date		



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Model Letter of Offer
The Award of a Bursary

Dear Mr & Mrs []

The Offer of a Place and Award of a Bursary

I am very pleased to tell you that, following the recent [Entrance Examinations] I am able to offer [child's name] a place in the School beginning in the [*** Term 200].

I have great pleasure also in offering [child's name] a Bursary that is worth []% of the cost of the tuition and weekly boarding fees together with an allowance for appropriate extras and the cost of initial uniform. The Bursary will normally be tenable throughout [child's name]'s time here but will be subject to an annual review and any material changes in your financial circumstances, which should be relayed to us without delay. One-third of the annual value of the Bursary benefit will be credited to the fee account each term.

The Bursary is subject to certain conditions which were included in the Means Questionnaire and are also set out overleaf and a parent's acceptance of a bursary award is taken as acceptance of these conditions.

I enclose an *Acceptance Form* with the current edition of our *Terms and Conditions* attached for you to read. In order to accept the place and the Bursary Award would you please complete and sign the form (two signatures required unless some other arrangement has been made) and return it to me. Please first detach and keep the *Terms and Conditions*.

A deposit of £[] is payable when you return the *Acceptance Form*. For more details about the deposit and how it will be credited please refer to section [] of the *Terms and Conditions*.

The place will be held open for a period of [3] weeks from today's date after which it may be offered to another family. If this time limit causes any difficulty please do not hesitate to telephone the Bursar.

I look forward to [] joining the School. I feel certain [s/he] will fit in well and benefit from the many opportunities we offer.

Yours sincerely

Dr David Livingstone
Head

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Twyford School

Bursary Scheme

Conditions of Award

1. **Obligations of the pupil:** A pupil who is the subject of an Award is required to work hard, to contribute positively to the life of the School, to be a credit to the School and to set a good example to other pupils. These are the *Purposes of the Award*.
2. **Obligations of the Parent/s:** The parents are expected to support and encourage the pupil to achieve the Purposes of the Award and to uphold the aims and the good name of the School. The parents are also required to pay the balance of the account by the first day of term.
3. **Withdrawal of the Award:** The Award may be withdrawn by written notice sent to a parent if, in the opinion of the Governors acting in good faith, the pupil or a parent has not complied with the obligations set out at paragraphs 1 and 2 above or otherwise the pupil has fallen below the required standards of conduct and progress and in the further opinion of the Governors there has been no significant improvement following consultation with a parent and/or the pupil and a written warning. Withdrawal of the Award shall take effect from the start of the following term.

Further, the Award may be withdrawn by written notice if:
 - the balance of the account remains unpaid 28 days after a written reminder has been sent to the parents;
 - the parents fail to disclose accurate information about their financial position.
4. **Repayment events:** Parents shall be required forthwith upon written notice to repay all or part of the benefits they have received under the Award in any of the following circumstances:
 - a) up to three terms' benefits (if received) if the pupil has engaged in serious misconduct or has been expelled or removed for reasons of misconduct by the requirement of the Head acting in good faith;
 - b) up to three terms' benefits (if received) in a case of the pupil being withdrawn for any reason during a school term without a term's written notice having been given;
5. **Fees in lieu of notice:** For the avoidance of doubt, the benefits receivable under an Award do not apply to any term for which the School has required payment of fees in lieu of notice.
6. **Terms and Conditions:** 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 terms and conditions as amended from time to time shall apply and these Conditions of Award shall be interpreted in accordance with them.

[Note: These conditions must be shown on the reverse side of every letter offering a Bursary.]