



Bursary and Awards (Scholarships and Exhibitions) Policy

Overview

Walthamstow Hall Senior School is one of the UK's top performing Independent schools with a long-established reputation for identifying talent and achieving excellence in all areas. The School's winning combination of top-flight teaching, motivated pupils, exceptional facilities and effective partnerships with parents ensures that every pupil becomes the best that they can be. Since its foundation as a charity for missionary daughters in 1838, the School has maintained a strong ethos of making a Walthamstow Hall education accessible to pupils with potential whatever their circumstances.

The Senior School offers means-tested bursaries to enable pupils from families facing financial limitations to benefit from a Walthamstow Hall education. Bursary applications are examined on a case-by-case basis and offered on a sliding scale dependent on the value of a family's income and assets. Founders' bursaries, offering up to 100%* of tuition fees are available for families in the greatest need. Parents whose daughters are in receipt of a Founder's Bursary are asked to pay a nominal fee of £50 per term.

Walthamstow Hall Senior School also offers financial Awards to pupils who show exceptional promise academically or in music, sport, drama and art. There are two types of Award; 'Exhibitions' are Awards worth a value of up to 10% of tuition fees and 'Scholarships' are Awards worth between 11 and 20% per discipline of tuition fees. Pupils wishing to apply for Awards are assessed by examination, interview and, where appropriate, audition/practical assessment. Awards worth 5-20% of the value of annual tuition fees are usually the norm, but combined scholarships of a value up to 50% of the fees are also offered to very exceptional pupils. Recipients of Awards are referred to as 'Scholars'.

Missionary daughters are educated free of charge where their parents are working in a foreign mission field.

Senior School Awards and bursaries may be combined but only to the maximum level of the means-tested bursary i.e. 100%*.

BURSARIES

Financial assistance with Senior School fees is available in the form of means-tested bursaries. Requests for financial support usually fall into two categories:

New applicants to the School where a place has been offered but parents/guardians are unable to fund the tuition fees.

Existing pupils where a change in parents'/guardians' circumstances has resulted in difficulty in meeting tuition fees and may result in the child being withdrawn part way through a stage of education.

Applications are assessed on a case-by-case basis. The level of award will be determined by the family's gross income, the value of their property, including any overseas' property, and other assets and their outgoings.

Founders' bursaries at Year 7, Year 9 and Sixth Form entry points, up to the value of 100%* of fees are available to families in the greatest need.

The Walthamstow Hall Alumnae Science Bursary

The Alumnae Science Bursary is open to pupils joining Walthamstow Hall in the Sixth Form who wish to study Science and/or Maths. The Award is means tested and worth up to 25% of the value of the fees. This bursary is funded by contributions from former Walthamstow Hall pupils.

Successful candidates are required to demonstrate a strong aptitude for Science and/or Maths by performing well in Walthamstow Hall scholarship papers in Science and Maths.

One Alumnae Science Bursary is available each year.

Families wishing to be considered for a bursary can do so when applying to the School via the application form which can be found in Appendix A of this Policy. On receipt of an application, the Bursar will get in touch with the family. Families should be aware that the application process is quite intrusive and will include a home visit by either the Bursar or a representative.

The Application Process

Bursaries may be made available to parents/guardians of children entering any year-group in the Senior School. (See the School's Admission's Policy). They are awarded at the discretion of the Governors and the Bursar is responsible for the management and coordination of the process.

Step one - parents/guardians 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 Appendix A and must be accompanied by full documentary evidence. The completed forms, together with the necessary documentary evidence, should be submitted to the Bursar no later than the date of the entrance exam in any year for bursaries to start the following 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 a representative (Bursary Admin Limited - BAL), visiting the parents'/guardians' home or conducting a telephone interview 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.

Step four - end of November. The parents/guardians are advised whether their child is to be offered bursary support.

Step five - parents/guardians are then required to sign a letter accepting the place at the School and an acknowledgement agreeing to any conditions relating to the bursary.

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. For instance, has the family considered other sources of funds such as the NFL Trust – <http://www.nfltrust.org.uk/> 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 Headmistress, be likely to make sound academic progress following admission and possess the potential to develop the quality of their work and benefit from participation in the wider, co-curricular activities on offer at the School. Bursary applicants must satisfy the School's minimum entry criteria, passing the Walthamstow Hall entrance exam and interview and receiving a good Head's report from their existing school.

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 what is viable 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 bursaries are well focused and so, as well as current earnings, other factors which will be considered in determining the necessary level of bursary 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 bursary 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:
 - Frequent or expensive holidays
 - New or luxury cars
 - Investment in significant home improvements

- Owning expensive animals such as ponies
- 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 (e.g.: 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.

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 **Appendix 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 asked to complete the means-testing form at **Appendix B**, the School will initiate the review. For those previously in receipt of bursaries, the Bursar in conjunction with the Headmistress, has the discretion to recommend to the Governors 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/guardians have failed to support the School, for example by the late payment of any contribution they are making to the fees.

Bursaries are awarded by the Governors and the names of pupils in receipt of them remain confidential. The School respects the confidentiality of bursary awards made to families and recipients are expected to do likewise.

AWARDS (EXHIBITIONS AND SCHOLARSHIPS)

Awards are offered to pupils who demonstrate exceptional promise in Walthamstow Hall Senior School assessments. 'Exhibitions' are Awards worth a value of up to 10% of tuition fees and 'Scholarships' are Awards worth between 11 and 20% of tuition fees. Recipients of all Awards are known as 'Scholars'. For Year 9 and Sixth Form awards, parents can apply for awards in up to a maximum of two disciplines.

Academic Awards

Academic Awards are offered at the Year 7, Year 9 and Sixth Form entry points to the School.

At Year 7 entry, parents may elect for their daughters to sit Academic Scholarship papers in Maths and English (both one hour) on a Saturday in November. Pupils who perform at the highest level in both the Walthamstow Hall Scholarship papers are selected to attend a Scholarship interview from which Scholars are identified.

At Year 9 entry, parents may choose General Entry or Scholarship Entry. For General Entry candidates sit papers in English, Maths and a Modern Language, French, German or Spanish. . For scholarship entry, candidates sit Walthamstow Hall Entrance Examination papers in Maths, English, Biology, Chemistry, Physics and one other subject, chosen by the candidate from the following; History, Geography, Latin, French, German, Spanish or Religious Studies). Pupils currently in Year 8 at Walthamstow Hall may also apply for a Year 9 Academic Scholarship and will sit the same papers as listed above. Award offers are made based on performance in these examinations and an interview.

At Sixth Form entry, potential Scholars, both current or external in Year 11, candidates sit specific Scholarship examinations consisting of a General Paper and papers in two subjects chosen by the candidate from the following; Maths, English Literature, Biology, Chemistry, Physics, History, Geography, Latin, Religious Studies, French, German and Spanish. Award offers are made based on performance in these examinations and an interview.

Music Awards

Music Awards are offered at the Year 7, Year 9 and Sixth Form entry points to the School.

At Year 7 entry candidates are asked to perform in front of a panel which includes an external adjudicator. The pupil should audition with at least two instruments, the second of which can be voice. Candidates should be performing at a minimum ABRSM Grade 4 or equivalent level in their principal instrument. The candidate will also be required to demonstrate their sight reading ability, will have a short aural assessment and will be interviewed by the panel.

The same audition process is followed at Year 9 where candidates would be expected to be performing at a minimum ABRSM Grade 5 level or equivalent in their principal instrument.

Again the same audition process is followed at Sixth Form where candidates would be expected to be performing at a minimum ABRSM Grade 7 level or equivalent in their principal instrument. Candidates will also sit a written paper. It is generally expected that the candidate to study Music at A Level if successful in winning an award.

Music Scholars are expected to attend all relevant orchestra and ensemble practices and to perform in and support all concerts and open mornings.

Existing Music Scholarship/Exhibition holders (from 2024 for Year 7 Award holders and 2022 for Year 9 Award holders) will be invited to reapply for Music Scholarships in Year 11 for Sixth Form.

Sport Awards

Sport Awards are offered at the Year 7, Year 9 and Sixth Form entry points to the School.

At Year 7 entry candidates attend a sports assessment morning at Walthamstow Hall. The assessment includes a range of activities designed to test leadership, team work, skills, aptitude and potential. (Candidates are not expected to have played lacrosse before). The assessment panel includes internal and external adjudicators. Candidates are also asked to submit references from two sports coaches, from outside clubs that they play for or from their current school. Candidates short listed for an Award will be recalled and interviewed by a panel.

For Year 9 Sport Awards, internal and external candidates will be invited to a sports assessment and interviewed on the same day. The assessment panel includes internal and external adjudicators. References from two sport coaches/teachers will be requested.

For Sixth Form Sport Awards, skills and leadership skills will be assessed along with an interview with An assessment panel which will include internal and external adjudicators. References from two sport coaches/teachers will be requested. There is no requirement to study PE at A Level.

Sports Scholars are expected to attend all relevant School sports practices and coaching sessions, to represent the School when selected for matches and competitions and demonstrate exemplary sportsmanship and team work. Their participation and support of School sport will be reviewed annually and the continuation of their scholarship provision reviewed accordingly.

Existing Sport Scholars (from 2024 for Year 7 Award holders) will be invited to reapply for Sport Awards in Year 11 for Sixth Form.

Drama Awards

Drama Awards are offered at the Year 9 and Sixth Form entry points to the School.

For Year 9 candidates have an interview, may undertake group work, including improvisation, and perform a prepared audition piece in front of a panel of internal and external adjudicators. A reference request from current school for suitability for an Award will be made.

For Sixth Form, candidates will have an audition plus interview in front of a panel of internal and external adjudicators. A reference request from current school on suitability for an Award will be made. It is generally expected that the candidate will study Theatre Studies at A Level if successful in winning an award.

Drama Scholars are expected to support the Drama department, performing in and assisting backstage in School productions.

Existing Drama Scholars will be invited to reapply for Drama Awards in Year 11 for Sixth Form.

Art Awards

Art Awards are offered at Year 9 and Sixth Form entry points.

For Year 9, candidates sit an Art examination at Walthamstow Hall and submit a portfolio of work which is assessed by the Headmistress and Head of Art. They are also required to undertake work in controlled conditions.

Sixth Form Art, 3D Design and Textiles

Candidates can choose one of the three disciplines. Candidates need to submit a portfolio of work which will be assessed by the Headmistress and Director of Creative Arts. They are also required to undertake work in controlled conditions and will have an interview with the Headmistress, The Director of Creative Arts and an outside assessor. A reference request from the pupil's current school on the candidate's suitability for Scholarship will be made. It is generally expected that the candidate will study Art or 3D Design/Textiles or Photography at A Level if successful.

Award Conditions

Candidates for Sports, Music, Drama and Art Awards must fulfil Walthamstow Hall's usual entrance criteria in the School's entrance examinations, interview and Head's report.

Award examinations/practical assessments must be taken on the designated scholarship examination/assessment days at Walthamstow Hall. For Year 7, 9 and Sixth Form entry, candidates must sit all scholarship papers on the designated day at the School. No exception can be made to this requirement. For Year 7 and 9 entry, overseas candidates may sit the entrance exams (but not scholarship papers) at their current school.

The Headmistress's decision on the offer and value of an Award is final.

We request that parents consider very carefully their commitment to taking a place at Walthamstow Hall when they apply for an Award. If an Award is offered but parents subsequently decline their daughter's place at Walthamstow Hall, the Award will not be offered to another candidate who would have benefitted. Walthamstow Hall assume that if an Award is applied for and given that it will be accepted for the duration of a pupil's career at Walthamstow Hall until the completion of their sixth form studies.

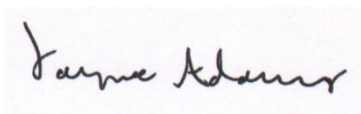
Scholarships are based on satisfactory progress, participation and conduct in School.

We are always delighted when parents accept an honorary Award so that the financial discount associated with an Award can be re-diverted into the School's bursary fund. In such instances the pupil is still recognised as a scholar and receives their scholarship prize.

Walthamstow Hall policies are approved, ratified and reviewed regularly by the Governing Body in the light of statutory requirements.

Reviewed March 2023
Next Review March 2024

Signed:



Date: 17 March 2023

Mrs J Adams
Chairman of the Governing Body

* Parents whose daughters are in receipt of a Founder's Bursary are asked to pay a nominal fee of £50 per term

Assessing your application – Data Protection considerations

The School reserves the function of making a decision regarding your application for a Bursary, but employs the services of Bursary Administration Limited (BAL) to prepare the information which is used to make this decision.

This means that, for the purposes of your application:

- the School is the Controller of your information
- BAL is the Processor of your information
- BAL is registered with the Information Commissioner's Office and has satisfied the School as to its arrangements regarding the security of any information and documents you may provide as part of your application.

Please note that no application will be considered unless the process as detailed below is followed.

IN MAKING THIS APPLICATION AND COMPLETING THIS FORM YOU WILL BE TAKEN TO HAVE CONSENTED TO THE PROCESSING OF FINANCIAL AND PERSONAL DATA RELATING TO THE APPLICANTS, PERSONAL DATA RELATING TO THE CHILD, AND SENSITIVE PERSONAL DATA RELATING TO THE APPLICANTS AND THE CHILD. RELEVANT INFORMATION MAY BE OBTAINED FROM THIRD PARTIES. YOU ARE ALSO TAKEN TO HAVE CONSENTED TO THE FOLLOWING PROCEDURE:

1. If an Application Form has been sent to you this should be completed and sent to the School. Supporting paperwork as required must be included.
2. The Application Form and the supporting paperwork that has been sent to the School will be scanned and forwarded securely to BAL using SharePoint so that BAL may prepare the information in the format required by the School.
3. Once BAL has received notification of your acceptance of their involvement in the application process, the company will contact you to make arrangements for a home visit or a telephone interview, or to make enquiries which will ensure that any paper financial review is as correct as it can possibly be.
4. BAL will send its report on your application securely to the School through SharePoint and will then withdraw from the process unless the School has any further enquiries it wishes BAL to make.
5. BAL will return an original application form securely to the School, shred any scanned/photocopied evidence documents securely using an authorised service, and scan and store securely on SharePoint its notes regarding your application; these notes will then be shredded securely using an authorized service. This process is undertaken once per year, and any papers (not your original supporting documents) will be held securely until then.
6. Your electronic records will be kept securely on SharePoint, and will be deleted four years after they are no longer required.

7. If the School has asked you to retain your application form and supporting documents in readiness for a home visit then BAL will follow procedure points 3 to 6 after the company has received this signed form, or a scanned copy of it.

Please be assured that this process is undertaken for the purposes of considering your application for a Bursary only, and your information will not be passed to any third party or used in any other way whatsoever.

BAL can arrange to share reports between schools if you are applying to more than one school for a Bursary, but this will not be done without your written permission (email will suffice), and the permission of the school on whose behalf BAL first visited.

You are entitled to request that your information be deleted permanently at any time.

It should be noted that the report produced by BAL is the property of the School and the Information Commissioner's Office regards your report as confidential and exempt from the provision of Subject Access Requests.

I/we have read the above and consent to my/ours and the child's/children's information being processed in the manner described above:

FATHER/STEPFATHER _____

MOTHER/STEPMOTHER _____

Date: _____

Child's full name _____

Address: _____

Contact telephone numbers _____

Contact email addresses _____

CONFIDENTIAL WHEN COMPLETED

Walthamstow Hall

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

Please read the Notes for Parents before completing this questionnaire

This questionnaire is in the form 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)			
		Father/Step Father	Mother/Step Mother
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)		
b	Self-employed (complete type of business)		
	Are you a Director or Shareholder or Proprietor of this Company or Business?	Yes / No	Yes / No
	If "YES" state proportion of Company or Business you and/or your spouse/partner own		
c	Unemployed		
d	Retired		

4. INCOME (see note)			
<i>(Please enter below your current earnings and expected income from all sources for this tax year)</i>			
		Father/Step Father	Mother/Step Mother
a	Gross Salary and other emoluments (including all taxable benefits & expenses) for the year to 5 th April 20[]		
b	Taxable profits of trade or profession for last two annual accounting periods	(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 Allowance		
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 of life assurance policies 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 (<i>including tax deducted at source</i>)	(i)	(i)
		(ii)	(ii)
b	National Insurance Contributions		
c	Pension or superannuation contributions (net)	(i)	(i)
		(ii)	(ii)
d	Mortgage repayments (<i>include capital repayment as well as interest</i>)	(i) Interest	(i) Interest
		(ii) Capital	(ii) Capital
e	Endowment mortgage insurance		
f	Any other interest payable e.g. overdrafts, credit cards, loans, etc. (<i>please specify</i>)		
g	Annual rent payable on principal residence		
6. CAPITAL ASSETS (see note)			
		Father/Step Father	Mother/Step Mother
a	Approximate market value of all investments		
	<ul style="list-style-type: none"> Building Society/Bank deposits/National Savings accounts 		
	<ul style="list-style-type: none"> Equity investments, (shares, unit trusts, corporate bonds and other securities) and Government stocks 		
	<ul style="list-style-type: none"> PEPs, ISAs, TESSAs, TOISAs 		
	<ul style="list-style-type: none"> Life assurance bonds and policies including endowments 		
b	Approximate market value of principal residence (<i>freehold or leasehold</i>)		
c	Approximate market value of other possessions including house contents, car, collections, paintings, jewellery etc.		
d	Cash at banks or elsewhere (<i>current accounts only</i>)		
e	Approximate market value of any other assets (<i>please specify and include the market value of any Insurance Policies maturing in this tax year or the last five years</i>)		

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)			
		Father/Step Father	Mother/Step Mother
<i>(Please give details of any capital charges against the assets declared in Section 6)</i>			
a	Mortgage Details		
	<ul style="list-style-type: none"> amount outstanding on principal residence a final payment date 		
b	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)					
<i>(Include the child to whom this application refers: if more than 4 children, give details on a separate sheet)</i>					
		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 (<i>excluding extras and sundry disbursements</i>)				
f	Compulsory additional school charges				
g	Amount of fees shown in (e) covered by:				
	<ul style="list-style-type: none"> Scholarships, Bursaries or other allowances given by school 				
	<ul style="list-style-type: none"> Annual sum arising from capital repayment scheme 				
	<ul style="list-style-type: none"> Services/Diplomatic/ Company Education Allowances (gross) (<i>state whether sum has been included in gross salary at 3 (a)</i>) 				
	<ul style="list-style-type: none"> Annual sum arising from Educational Insurance Policies 				
	<ul style="list-style-type: none"> Assistance from any other sources e.g. Grandparents, trusts, charities, etc. (<i>please specify</i>) 				
h	<ul style="list-style-type: none"> Annual income of child (<i>if any</i>) 				
	<ul style="list-style-type: none"> Capital Value of Trust 				
<p><i>The details requested with regard to the fees payable and grants on behalf of your other children are for information only and will not normally be taken into account in the assessment of the level of bursary awarded.</i></p>					

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		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

The School may wish to visit you at your home address to discuss your application for support. Please indicate whether you are happy to receive a visit from the school's representative.

Yes / No
Delete as appropriate.

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.

Please state whether you have applied to trusts or foundations for a Bursary, and if so to which and with what result.

ANY ADDITIONAL INFORMATION

14 DECLARATION

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

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

We/I understand that if we/I are/am offered a Bursary for our/my child and accept a place for them at the School, the following terms and conditions will apply as between ourselves/myself and the School: -

- a) our/my 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/I must complete an annual declaration of our/my financial circumstances on the form sent to us/me by the School and supply all relevant supporting evidence by the return date indicated;
- c) we/I will report immediately any material change in the financial position declared;
- d) the Bursary may be withdrawn or reduced if:
 - i) we/I act or our/my child acts in breach of the School's Terms and Conditions attached to the Acceptance Form for our/my child at the School;
 - ii) we/I have failed to return the annual declaration of our/my financial circumstances by the return date indicated;
 - iii) we/I have failed to produce any additional information required by the School to evidence our/my financial circumstances;
 - iv) in the opinion of the Headmistress, our/my child's attendance, progress or behaviour no longer merits the continuation of the award;
 - v) we/I 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/my financial circumstances;
 - vii) the School's resources are insufficient to maintain the level of award.
- e) the Bursary will be withdrawn and the value of any amount of the Bursary previously credited against our/my child's fee account will become repayable to the School forthwith if we/I have fraudulently, knowingly or recklessly provided false information in relation to the award of the Bursary.

Signatures: (See note on Parents/Applicants)

Parent/Guardian*.....Date

Parent/Guardian*.....Date

[NB. Each person with parental responsibility for the child is required to sign this form and the School is entitled to treat any information received from any person who has signed this form as having been on behalf of both or all such persons]

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/APPLICANTS

These are defined as:

- The natural father and mother of the child where they live together (whether or not they are married to each other) and the child normally resides with them both in the same household; or
- The parent of the child with whom the child normally resides and the partner (if any) of that parent where the partner normally resides with that parent and the child in the same household; or
- The child's guardian appointed in accordance with section 5 of the Children Act 1989 (or any earlier enactment) and the partner (if any) of that guardian where the partner normally resides with that guardian and the child in the same household; or
- The person with whom the child resides in accordance with either:
 - i. a subsisting residence order made under section 8 of the Children Act 1989; or
 - ii. any subsisting court order (other than a residence order) which specifies who is to have actual custody or care and control of the child; or
- Where a pupil either has no parents as defined above or the School is satisfied that no such parents can be found, and she is either looked after by a local authority or provided with accommodation within the meaning of section 105(1) of the Children Act 1989, the pupil shall be treated as one whose parents have no income for the purposes of the scheme; or
- Where none of the above applies, the parent is the person with whom the pupil normally resides in accordance with any informal care or fostering arrangement and that person's partner (if any) where the partner normally resides with that person and the pupil in the same household.
- If parents are separated or divorced before or while their child attends the School, both mother and father will require to complete and sign the Application Form.

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 agreed by HMRC or relevant tax authority for the year in question (deductions should be made only in respect of capital allowances). Copies of the latest set of accounts should be included.
- 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.
- f) All social security benefits received should be declared and type of benefit specified.
- g) 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 meals.
- j) Enter income from letting or subletting of property at the amount of the NET profit agreed with HMRC; and royalties and all other sources including entertainment and travel allowances etc.

SECTION 5: OUTGOINGS

- a) Enter Income Tax and tax on 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. The current market value should be estimated by parents where a current valuation is unavailable.
- c) 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.
- d) 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 of other liabilities should be provided along with the lender.

SECTION 8: DEPENDENT CHILDREN

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

- e) 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.
- f) 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 pupil grants. You should enter the capital value of any beneficiary or other trust set up for each child.

SECTION 9: 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.

Please read the Guidance Notes at the end of this document before completing this form

Assessing your application – Data Protection considerations

The School reserves the right to make all decisions regarding your application for a Bursary, but employs the services of Bursary Administration Limited (BAL) to prepare the information which is used to make the decision.

This means that, for the purposes of your application:

- Walthamstow Hall is the Controller of your information.
- BAL is the Processor of your information.
- BAL is registered with the Information Commissioner's Office and has satisfied the School as to its arrangements regarding the security of any information and documents you may provide as part of your application.

Please note that no application will be considered unless the process as detailed below is followed.

IN MAKING THIS APPLICATION AND COMPLETING THIS FORM YOU WILL BE TAKEN TO HAVE CONSENTED TO THE PROCESSING OF FINANCIAL AND PERSONAL DATA RELATING TO THE APPLICANTS, PERSONAL DATA RELATING TO THE CHILD, AND SPECIAL CATEGORIES OF PERSONAL DATA RELATING TO THE APPLICANTS AND THE CHILD. RELEVANT INFORMATION MAY BE OBTAINED FROM THIRD PARTIES. YOU ARE ALSO TAKEN TO HAVE CONSENTED TO THE FOLLOWING PROCEDURE:

1. An Application Form will be completed and sent to the School as detailed at the bottom of the form. Supporting paperwork as required must be included.
2. The Application Form and supporting paperwork will be scanned and forwarded securely to BAL using Microsoft SharePoint so that BAL may prepare the information in the format required by the school.
3. BAL will contact you to make arrangements for a phone appointment or to make enquiries which will ensure that any paper financial review is accurate.
4. BAL will send its report on your application securely to the School through SharePoint and will then withdraw from the process unless the School has any further enquiries it wishes BAL to make.
5. BAL will return an original application form securely to the School, shred any scanned/photocopied evidence documents securely using an authorised service, and scan and store securely on SharePoint its notes regarding your application; these notes will then be shredded securely using an authorised service. This process is undertaken once per year, and any papers (not your original supporting documents) will be held securely until then.
6. Your electronic records will be kept securely on SharePoint, and will be deleted four years after they are no longer required.

Please be assured that this process is undertaken for the purposes of reviewing your application forward of a Bursary only, and your information will not be passed to any third party or used in any other way whatsoever.

You are entitled to request that your information be deleted permanently at any time.

It should be noted that the report produced by BAL is the property of the School and the Information Commissioner's Office regards your report as confidential and exempt from the provision of Subject Access Requests.

I/we have read the above and consent to my/ours and the child's/children's information being processed in the manner described above:

FATHER/STEPFATHER

MOTHER/STEPMOTHER

Date: _____

Walthamstow Hall

**Confidential Statement of Financial Circumstances
in support of a Bursary review**

I. CHILD

- a) Full Names _____
- b) Date of birth _____
- c) Term / year
for entry or
date of joining _____

2. PARENTS

(see note 2)

Father/ Stepfather

Mother/ Stepmother

- | | | |
|-----------------------------|---|---|
| a) Names and title | _____ | _____ |
| b) Address | _____ | _____ |
| | _____ | _____ |
| | _____ | _____ |
| | _____ | _____ |
| c) Occupation | _____ | _____ |
| d) Employment Status | Retired – Self-employed –
Employed – Unemployed
(please circle) | Retired – Self-employed –
Employed – Unemployed
(please circle) |
| e) Employer name | _____ | _____ |
| f) Shareholding of business | _____ | _____ |
| g) Are you a Co. Director? | _____ | _____ |
| h) Daytime Tel | _____ | _____ |
| i) Evening Tel | _____ | _____ |
| j) Mobile | _____ | _____ |
| k) E-mail | _____ | _____ |

3. FINANCIAL DATA (see note 3)**NOTES**

INCOME	PER MONTH	PER YEAR
PAYE 1		
PAYE 2		
BUSINESS DIVIDENDS		
SELF-EMPLOYED INCOME		
PENSIONS		
INVESTMENT INCOME		
BENEFITS:		
Child Benefit		
Child Tax Credits		
Working Tax Credits		
Carer's Allowance		
Disability / PIP		
Housing / Council Tax		
Any other		
MAINTENANCE RECEIVED		
FAMILY SUPPORT		
STUDENT FINANCE		
OTHER INCOME		

RENTAL PROPERTIES (IF ANY)	PER MONTH	PER YEAR
INCOME		
RENTAL INCOME		
EXPENDITURE		
MORTGAGE		
AGENT'S FEES		
OTHER EXPENSES:		
Landlord's Insurance		
Maintenance Contracts		
Ground Rent		
Service Charges		
Certification		
Council Tax		
Utility Bills		
Repairs/maintenance		
Other Expenses		

NOTES

EXPENDITURE	PER MONTH	PER YEAR
PAYE TAX 1		
PAYE TAX 2		
SELF-EMPLOYED TAX		
NI 1		
NI 2		
PENSION CONTRIBUTIONS 1		
PENSION CONTRIBUTIONS 2		
LIFE INSURANCES/ ENDOWMENTS		
PRIVATE HEALTH		
MAINTENANCE PAID		
MORTGAGE		
RENT		
HOUSE INSURANCE		
COUNCIL TAX		
ELECTRIC		
GAS/OIL/WOOD/OTHER		
WATER		
OTHER HOUSEHOLD INS		
FOOD/SUBSISTENCE/SCHOOL LUNCHES		
CLOTHING		
LANDLINE/BROADBAND/TV		
MOBILES		
TV LICENCE		
TV PACKS		
MEDICAL EXPS		
PET EXPS		
PUBLIC TRANSPORT EXPS		
CAR FINANCE 1		
CAR FINANCE 2		
FUEL (ALL CARS)		
CAR TAX (ALL CARS)		
CAR INSURANCE (ALL CARS)		
MAINTENANCE (ALL CARS)		
BREAKDOWN COVER		
PARKING		
TUTORS (ACADEMIC/MUSIC)		
CLUBS AND ACTIVITIES		
CHILDCARE / NURSERY		
LOAN REPAYMENTS		
CREDIT CARD REPAYMENTS		
DEBT MANAGEMENT REPAY		

ASSETS	FATHER	MOTHER	COMBINED
FAMILY HOME			
OTHER UK PROPERTY			
FOREIGN PROPERTY			
CURRENT ACCOUNT			
DEPOSIT ACCOUNT			
SHARES/EQUITIES			
ISAs			
PREMIUM BONDS			
FIXED TERM BONDS			
OTHER INVESTMENTS			
PENSION (IF OVER 55)			
SETTLEMENTS DUE			
DECLARED INSURANCE ITEMS			
VEHICLES (OVER 2)			
VALUE OF BUSINESS			

LIABILITIES (MONIES OWED)	FATHER	MOTHER	COMBINED
MORTGAGE (FAMILY HOME)			
SECURED LOANS			
OTHER UK MORTGAGES			
FOREIGN MORTGAGES			
COMMERCIAL LOANS			
FAMILY LOANS			
FINANCE LEASES			
CREDIT CARDS			
ARREARS			
SCHOOL FEE ARREARS			
DEBT MANAGEMENT			

If properties, other than the family home, are owned please list full addresses below:

Please list any other items of expenditure:

4. DEPENDENT CHILDREN

NOTES

	(see note 4) Applicant	Child 2	Child 3	Child 4
a) Forename				
b) DOB				
c) Current school				
d) Boarding or day				
e) Annual fees				
f) Compulsory extras				
g) Uniforms				
SUB TOTAL (a-g)				
h) Fees covered by:				
i) School scholarships / bursaries / allowances				
ii) Family assistance				
iii) Other assistance				
iv) Child's income				
SUB TOTAL (hi-iv)				
TOTAL (a-g) LESS (h)				

5. OTHER DEPENDENTS (see note 5)

DOCUMENTS TO BE SUPPLIED

Please supply originals of the following documents:

Last 3 payslips

Last P60

Latest audited accounts (if appropriate)

Latest management accounts (if audited accounts are more than 9 months old)

Latest self-assessment tax calculation (if appropriate)

Schedule D self-employment income declaration (if appropriate)

3 months' bank statements

Proof of value of investments (may include internet valuation)

Latest pension and endowment valuation

Benefit letters (if appropriate)

Latest mortgage statement (on all properties if appropriate) / rent agreement

Latest loan statements

Contents insurance schedule

Legal financial agreements

Any other appropriate documents to support your application

ALL DOCUMENTS WILL BE RETURNED SECURELY ONCE THE APPLICATION HAS BEEN PROCESSED

YOU WILL BE NOTIFIED THE FINAL RESULT BY THE SCHOOL DIRECTLY

DECLARATION

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

We/I have read the notes and have made a complete declaration of our/my income and assets. We/I understand that we/I are/am applying for our/my child and accept a place for him/her at the School:

- a) Our/my child's fees account with the School will be credited termly with the amount of the grant
- b) We/I understand that any award or grant is subject to annual review and that we/I must complete an annual declaration of our/my financial circumstances on the forms on the forms sent to us/me by the School or its agent and supply all relevant supporting evidence by the return date indicated
- c) We/I undertake to report immediately any material change in the financial position declared
- d) The grant may be withdrawn or reduced, and in certain circumstances, past payment reclaimed if:
 - i) there is a breach of the School's Terms and Conditions to the acceptance of a place for our/my child at the School
 - ii) we/I have knowingly and/or recklessly provided false information
 - iii) we/I have failed to return the annual declaration of our/my financial circumstances by the return date indicated

- iv) we/I have failed to produce any additional information required by the School or its agent to evidence our/my financial circumstances
- v) there is in the view of the Headmistress either unsatisfactory work or conduct
- vi) the School's resources are insufficient to maintain the level of the award

Signatures:

Father / Stepfather _____ Date_____

Mother / Stepmother_____ Date_____

If the above declaration is signed by only one parent, please give reason by deleting as necessary below:

Divorced / separated / widowed

Other (state reason)

Please return this completed form and all documents to The Bursar's Office, Walthamstow Hall.

GUIDANCE NOTES

Please read these carefully before completing the Application Form. If you need further help, please contact Bursary Administration.

The numbers below refer to the same numbers on the application form. If you pay tax in any way, please include the appropriate reference number. If any of your assets are held abroad, please convert the value to pounds sterling.

2. PARENTS / APPLICANTS

Anyone with care and control of a child can apply for assistance. This person could be:

- the natural father and mother of a child where they live together
- the natural father or mother of a child and their new partner
- the child's appointed Guardian (appointed by a Court)
- the person with whom a child resides and has care and control of the child as a result of a court order or other legal agreement
- the person with whom a child resides and has care and control of the child as a result of an informal agreement

Please note Foster Parents acting under a Full Care Order will be regarded as having no income

Please note if the natural parents are separated and/or divorced both will be required to provide financial information and sign an Application Form

3. FINANCIAL DATA

- Gross salaries for both parents
- Dividends received from an owned limited company
- Net self-employed income before tax
- Pensions received
- Gross investment income
- Benefits received
- Maintenance payments received (formal or informal)
- Support from family or friends
- Any other income
- Rental properties – income and expenses
- Maintenance payments being made
- Family expenditure detailed in the form
- Combine assets and liabilities according to type

Please either show assets by father/mother or combined as appropriate.

4. DEPENDENT CHILDREN

Use column 1 for the child for whom you are applying and columns 2 – 4 for any other dependents.

e) Please refer to the current academic year

h) (iii) Please state any other educational allowances received. If you have been able to claim under any policy, please declare the amount received under the policy for the current academic year.

(iv) If the child is in receipt of financial assistance from a Trust Deed or other external source please declare the annual amount available, and please enter the gross amount of any interest / share dividends received by the child

5. OTHER DEPENDENTS

Please provide details of any other family members who are financially dependent upon you.

6. ANY OTHER RELEVANT INFORMATION

Please enter any details which may affect the assessment of the grant, for example a significant change in income or outgoings for the coming year.

Please use this page to add any information which you feel is relevant to your application (see note 6)

This image shows a full page of white paper with horizontal blue or grey ruling lines. The lines are evenly spaced and run across the width of the page, providing a template for handwriting practice or general writing. There are no margins, text, or other markings on the page.

YOU MAY WISH TO KEEP A COPY OF YOUR COMPLETED APPLICATION FORM FOR YOUR OWN RECORDS