



The Oratory Schools Association

Means-tested Bursaries

September 2025

General

The Governors of the Oratory Schools Association are committed to broadening access to the school by offering to eligible parents/guardians means-tested financial support with the payment of school fees. Such bursaries may be awarded in the form of a percentage discount on day/boarding fees payable, depending on the financial, compassionate or other pertinent circumstances of applicants.

Bursary awards are subject to repeat testing of parental means each year and may be varied upward or downward, or subject to withdrawal, depending on parental circumstances. Awards are made on a case-by-case basis according to individual circumstances e.g. savings, investments and realisable assets as well as income, the number of dependants and compassionate or other pertinent considerations.

The school reserves the right to amend the way in which awards are assessed.

Requests for financial support usually fall into two categories:

- New applicants to the school who have registered where parents/guardians are unable to fund the tuition fees in full.
- 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parents'/guardians' circumstances has resulted in difficulty in meeting tuition fees and may result in the child being withdrawn part way through a stage of education.

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.

The Application Process

Bursaries may be made available to parents/guardians of children entering any year-group. (See the school's Admission's Policy for further information on the school's entry criteria.) They are awarded at the discretion of the Head, Bursar, who is responsible for the management and coordination of the process, and Governors.

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 school collects the financial information through a Bursaries portal, the link to which will be emailed when the school is made aware that parents/guardians wish to apply for a bursary. For new applicants to the school this is likely to be via the Admissions Office. Parents/guardians of existing pupils should contact the Bursary on bursary@oratory.co.uk if they wish to make a hardship application. Parents/guardians need to activate their account on the portal and will then be guided through completion of the form (a proforma form is included as Annex A) and the uploading of full documentary evidence.

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.

The School currently outsources the initial assessment of applications to Bursary Administration Ltd (BAL) and the form and supporting information will be forwarded to them via the portal once complete. (Please note that it is not possible to progress to the BAL review stage without completion.) BAL require a telephone interview with the parents or guardian to discuss the family circumstances and the application. For existing bursaries, renewals giving rise to a material change may also be referred to BAL for further examination. 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 Notice – Current, past and prospective pupils and their parents which is available on the School's website and is otherwise available from the School upon request.

The BAL report is reviewed by the Bursar and Head in order to establish the likely level of support that will be required in order to enable the child to attend the School.

Bursary decisions are made as soon as practicable following entrance and scholarship tests and advised by email. Parents/guardians are invited to formally accept the offer of a bursary and agree to the Conditions of the Award.

The Case for Assistance

The Head and Bursar 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** - Bursary funds are limited and priority will be given to those candidates judged most likely to gain most from the 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 their 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.

- **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:
 - second properties/land holdings
 - investment in significant home improvements
 - luxury cars
 - 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 The Oratory School).

Annual Review

All bursary awards are subject to repeat testing of parental means each year and may be varied upward or downward depending on current parental circumstances. Current bursary holders will be issued with repeat means-testing forms for completion by the end of April. For those previously in receipt of bursaries, the Head and Bursar have the discretion to reduce or withdraw an award not only where a pupil's progress, attitude, attendance 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, 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.

All bursaries will be reassessed in detail before a pupil enters the sixth form. At that point the school may advise that it can no longer provide bursary support and advise a change of school.

Confidentiality

The school respects the confidentiality of bursary awards made to families and recipients and prospective recipients are expected to do likewise. A breach of confidentiality may lead to the withdrawal of bursary support.

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. The Oratory School encourages parents/guardians to apply for support where it is felt a good case can be made for assistance. A list of educational trusts is included at Annex B and further information is obtainable from: The Educational Trusts Forum Website: www.educational-grants.org.

Annex A: Bursary Application Form and Guidance

Annex B: Educational Trusts

Annex A

For school use (please tick):

New applicant
Renewal

Service required:

Home visit
Zoom/Teams

BURSARY ADMINISTRATION LIMITED

on behalf of



THE ORATORY

1859

_____(School)

**BURSARY APPLICATION FORM - to be completed
on the Bursaries portal (link will be emailed to
you)**

Confidential Statement of Financial Circumstances

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

ASSESSING YOUR APPLICATION

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.

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 PERSONAL AND FINANCIAL DATA RELATING TO THE APPLICANTS, PERSONAL DATA RELATING TO THE CHILD OF THE APPLICATION AND ANY OTHER CHILDREN OF THE FAMILY, AND SENSITIVE PERSONAL DATA RELATING TO THE APPLICANTS, THE CHILD AND ANY OTHER CHILDREN OF THE FAMILY.

PERSONAL, FINANCIAL AND SENSITIVE DATA RELATING TO THIRD PARTIES MAY NEED TO BE PROCESSED (IF YOU FEEL IT IS NECESSARY), AND YOU WILL NEED TO OBTAIN THE THIRD PARTIES' CONSENT BY ASKING THEM TO SIGN THIS SECTION OF THE APPLICATION FORM.

BURSARY ADMINISTRATION LIMITED

PRIVACY POLICY AND NOTICE

Introduction

Bursary Administration Limited (BAL) has been registered with the Information Commissioner's Office (ICO) since 13th February 2009 and is currently registered as a Data Controller under the reference Z1647679 and acts both as a Data Controller and Processor on behalf of client schools as required. BAL will make every endeavour to abide by the principles and terms of UK GDPR. BAL undertakes to take all possible care to protect Bursary applicants' (ie the families') and client schools' sensitive data.

The purpose of this policy is to outline BAL practices with respect to data collected from families who use BAL's website and provide personal (including sensitive) and financial data with regard to their applications to BAL's client schools for Bursarial support.

Grounds for data collection

BAL collects data in order to be able to contact applicants and then processes the data, which is provided to BAL as part of a Bursary application, in such a way as to provide a report to BAL's client, the school to which the application is being made, in order to help the Governors of that school make a decision regarding the Bursary application.

Using BAL's website

The only way BAL's website will collect data on a contact is if the contact chooses to send BAL a message through the 'Contact Us' page, which requests name and email address details. The Wordpress database, which the website uses, stores first and last name, the email address,

and the message sent to BAL. The website also stores details of the web browser used, the pages which the sender viewed, and the IP address from which the message was sent. The website does not run cookies for any user who is not able to sign-in to the website, which is no-one outside of BAL staff. The website will pass on the first and last name of the sender, the sender's email address and message onto BAL's email system, Office 365. When a contact uses BAL's website, he or she consents to this collection, storage, and transmission of data. The website and BAL's email system, Office 365, is stored securely on servers which are situated within the United Kingdom.

User Rights with regard to the website

You may request to:

1. receive confirmation as to whether or not personal data concerning you is being processed
2. receive a copy of personal data you directly volunteer to BAL in a structured, commonly-used and machine-readable format
3. request rectification of your personal data that is in BAL's control
4. request erasure of your personal data
5. object to the processing of personal data by BAL
6. request to restrict processing of your personal data by BAL
7. lodge a complaint with the ICO

However, please note that these rights are not absolute, and may be subject to BAL's legitimate interests and regulatory requirements.

If you wish to exercise any of the above rights please contact Liz Moseley on liz@schoolbursaryguide.com

Retention

BAL will retain data collected from the website for as long as necessary to provide BAL's services, and as necessary to comply with BAL's legal obligations, resolve disputes, and enforce BAL's policies. Retention periods will be determined taking into account the type of data that is collected and the purpose for which it is collected, bearing in mind the requirements applicable to the situation and the need to destroy outdated, unused data at the earliest reasonable time.

Making an application

When you make an application BAL will collect personal (including sensitive) and financial data:

- Name and date of birth of child(ren) of the application, and home address
- Full contact data of parents/carers making the application
- Employment details of parents/carers making the application
- Names and dates of birth of other dependent children, and schools attended for all children of the family, including Bursarial/grant/other fee support and/or scholarship details as appropriate
- Names of other dependents, for example grandparents
- Financial data for the parents/carers making the application, whether that be separately or jointly (separate parents/carers usually use different application forms). This will include data regarding income and expenditure, assets and liabilities.
- Contact and financial data for adults who hold or are considered by the client school concerned to hold a financial interest in the application, for example a second partner, or a grandparent who will support fees. It may be that full financial data for that person(s) will not be deemed necessary.

- Sensitive data, for example medical, social service involvement, but only as necessary to support an application. It is important to note that this may, out of necessity, be data regarding a third party as that situation may have a bearing upon the application.

Please note that BAL may use any publicly-available information (data) in order to provide as full a report to the client school as possible, but will not make a credit check upon any adult mentioned in the application, nor undertake any searches which would affect any adult's credit status.

How BAL receives this data

An application will be completed (either online or on paper) and sent either to the client school or directly to BAL as detailed at the bottom of the form. Supporting paperwork as required must be included.

If the Application Form and the supporting paperwork has been sent to the client school this will be scanned and forwarded to BAL using a document exchange system so that BAL may commence its work.

Assessing your application

BAL will contact you to make arrangements for a home visit or Zoom/Teams interview if this has been required by the client school. As there are time constraints for assessing applications BAL will offer two home visit/online appointments before referring the application back to the client school for further directions.

BAL will send its report on your application to the client school through a document exchange system and will then withdraw from the process unless the client school has any further enquiries it wishes BAL to make.

Data retention and security

Any paper documents which BAL uses for the purpose of making its report to its client schools are stored in plastic wallets under lock and key. BAL undergoes the process of removing all papers held from storage once each month: these papers, which will include home visitors'/assessors' handwritten notes, are scanned and then shredded securely using an authorised service. Scans are stored securely on memory drives which are not linked to the internet in any way, and are themselves stored securely under lock and key.

Any electronic data, whether it be held on BAL's system, a BAL computer (necessary whilst a report is in process), or a memory drive, is stored within the United Kingdom. Electronic data will be deleted after the expiration of four years, unless its retention is necessary to comply with BAL's legal obligations, resolve disputes, or enforce BAL's policies.

It will be appreciated that BAL home visitors/assessors will need to transport papers/their laptop computers as they go about their daily work. These papers/computers are left out of sight in locked facilities if not in use, and the computers are passworded and encrypted. BAL uses multi-factor authentication to protect its computers (this means that if any person other than the recorded user of a BAL laptop tries to access it the recorded user will be contacted by electronic means, an app, and will be able to deny access to the laptop). It should be noted that home visitors/assessors are not permitted to use their personal equipment for their work with BAL.

Applicant Rights

You may request to:

1. receive confirmation as to whether or not personal data concerning you is being processed
2. receive a copy of personal data you directly volunteer to BAL in a structured, commonly-used and machine-readable format
3. request rectification of your personal data that is in BAL's control
4. request erasure of your personal data
5. object to the processing of personal data by BAL
6. request to restrict processing of your personal data by BAL
7. lodge a complaint with the ICO

However, please note that these rights are not absolute, and may be subject to BAL's legitimate interests and regulatory requirements.

If you wish to exercise any of the above rights please contact Liz Moseley on liz@schoolbursaryguide.com

Important points to note

- BAL will only use applicants' data of any type for the purpose of assessing the application and making a report to the client school
- BAL will never release applicants' data, of any kind, to any person or body outside of the client school to which the applicant is applying. There is one exception to this, if the applicant has applied to more than one of BAL's client schools, in which case the report will be shared, but only with all parties' approval. In making this application and signing this form you are taken to have consented to sharing the report.
- If assessing separated parents/carers, BAL staff will never reveal any type of data of one parent/carer to the other
- BAL will never market its services to any applicant
- BAL will not knowingly collect data of any type from a minor without the prior and express consent of a parent or carer
- All BAL staff are required to sign confidentiality clauses when they commence working for the company, and are trained in matters of Data Protection and Security
- Any data breach of any type will be reported to the client school immediately, and contact made with the applicants as agreed with the school concerned. The breach will then be reported to the ICO in accordance with regulations.
- It should be noted that the report produced by BAL is the property of the client school: requests for the release of a report under the provisions of SAR will always be considered on an individual basis.

This Policy will be reviewed annually and amended as necessary.

The Data Protection Officer is Liz Moseley, who can be contacted on liz@schoolbursaryguide.com

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:

PARENT/CARER 1

PARENT/CARER 2

THIRD PARTY

THIRD PARTY

Date: _____

i)
Shareholding
of

co./business

3. FINANCIAL DATA (see note 3)

NOTES

INCOME	PER MONTH	PER YEAR
PAYE PARENT/CARER 1		
PAYE PARENT/CARER 2		
SELF-EMPLOYED INCOME 1		
SELF-EMPLOYED INCOME 2		
BUSINESS DIVIDENDS 1		
BUSINESS DIVIDENDS 2		
PENSIONS RECEIVED (Both)		
INVESTMENT INCOME (Both)		
BENEFITS:		
Child Benefit		
Tax Credits		
Universal Credits		
Carer's Allowance		
Disability / PIP		
Housing / Council Tax		
Other Benefits		
MAINTENANCE RECEIVED (Child and spousal)		
FAMILY SUPPORT		
STUDENT FINANCE		
BENEFITS IN KIND		
OTHER INCOME		

RENTAL PROPERTIES (IF ANY, <u>NOT</u> THE FAMILY HOME)	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			
EXPENDITURE			PER MONTH
Repairs/maintenance			PER YEAR
Other Expenses			
PAYE TAX PAID PARENT/CARER 1			
PAYE TAX PAID PARENT/CARER 2			
DIVIDEND TAXES (Both)			
PROPERTY TAX (IF SEPARATE AMOUNT)			
NI PAID PARENT/CARER 1			
NI PAID PARENT/CARER 2			
PENSION CONTRIBS 1			
PENSION CONTRIBS 2			
LIFE INSURANCES			
PRIVATE HEALTH			
MORTGAGE			
RENT			
GRD RENT/SERV CHARGE			
HOUSE INSURANCE			
COUNCIL TAX			
LIGHT/HEAT/POWER			
WATER			
OTHER HOUSEHOLD INS			
FOOD <u>INCL</u> SCHOOL LUNCHESES			
CLOTHING			
LANDLINE/BROADBAND PACKAGES			
MOBILES			
TV LICENCE			
SKY/NETFLIX/PRIME Etc			
MEDICAL EXPS			
PET EXPS			
PUBLIC TRANSPORT EXPS			
CAR 1 FINANCE			
CAR 1 FUEL			
CAR 1 TAX/INS/MAINT			
CAR 2 FINANCE			
CAR 2 FUEL			
CAR 2 TAX/INS/MAINT			
BREAKDOWN/PARKING			
UNIVERSITY SUPPORT			
NURSERY FEES			
TUTORS (Academic/Music)			
CHILDCARE			
CHILD/SPOUSAL MAINTENANCE PAID			
PROFESSIONAL FEES			
CHARITABLE DONATIONS			

DEBT SERVICING	PER MONTH	PER YEAR
LOAN REPAYMENTS		
CREDIT CARD REPAYMENTS		
DEBT MANAGEMENT REPAYMENTS		

ACTIVITIES		
CHILDREN'S ACTIVITIES		
PARENTS' ACTIVITIES		
HOLIDAYS		

OTHER EXPENSES (eg Tithes):

PLANNED CAPITAL EXPENDITURE IN THE NEXT 12 MONTHS (eg house, vehicle, white goods):

VEHICLE DETAILS:

MAKE	MODEL	REG NUMBER	VALUE

STATEMENT OF AIM

Please indicate how much you feel you can contribute towards school fees each term:

ASSETS	PARENT/CARER 1	PARENT/CARER 2	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			
VEHICLE VALUE			
VALUE OF BUSINESS			

LIABILITIES (MONIES OWED)	PARENT/CARE R 1	PARENT/CARE R 2	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:

4

DEPENDENT CHILDREN

(see note 4)
Applicant

Child 2

Child 3

Child 4

a) Child's name				
b) Date of birth				
c) Current school				
d) State or independent				
e) Boarding or day				
f) Annual fees				
g) Compulsory extras				
h) Fees covered by:				
i) School scholarships/ bursaries/ allowances				
ii) Family assistance				
iii) Other assistance				
iv) Child's income				

IS YOUR CHILD IN RECEIPT OF FREE SCHOOL MEALS? Yes/No (Please circle)

HAVE YOU STARTED OR ARE YOU IN THE PROCESS OF STARTING AN EHCP APPLICATION? IF SO, WHAT IS THE STATUS OF THE PROCESS?

5. OTHER DEPENDENTS (see note 5):

DOCUMENTS TO BE SUPPLIED

Please supply **COPIES** of the following documents:

Last 3 payslips for each applicant

Last P60 for each applicant

Latest FULL audited accounts (if appropriate)

Latest self-assessment tax calculation summary (SA302) (if appropriate) for each applicant (please do not send full tax return)

Schedule D self-employment income declaration (if appropriate) for each applicant

3 months' bank statements for all accounts

Proof of value of savings and investments (may include internet valuation)

Latest pension valuation if over 55

Benefit/Tax Credit/Universal Credit letters (if appropriate)

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

Latest loan statements

Latest credit card statements

Contents insurance schedule

Legal financial agreements

IF THIS IS A RENEWAL APPLICATION PLEASE INCLUDE A COPY OF YOUR LAST TERM'S INVOICE FOR EACH CHILD OF THE FAMILY, EVEN IF THE OTHER CHILDREN ARE NOT AT THE SCHOOL OF THIS APPLICATION

Any other appropriate documents to support your application

ANY ORIGINAL DOCUMENTS WILL BE RETURNED SECURELY ONCE THE APPLICATION HAS BEEN PROCESSED. COPY DOCUMENTS WILL BE SHREDED SECURELY.

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 all applicant(s) (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 Head either unsatisfactory work or conduct
 - vi) the school's resources are insufficient to maintain the level of the award

Signatures:

Parent/Carer 1 _____ Date_____

Parent/Carer 2 _____ 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 form and all documents to:
 BURSARY ADMINISTRATION LIMITED at admin@schoolbursaryguide.com. You are welcome to use Dropbox or any other document exchange system.
 Telephone 01622 725712 or email admin@schoolbursaryguide.com for all queries

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. 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, either together or separately

3. FINANCIAL DATA

- Gross salaries for both parents/carers
- 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 Parent/Carer 1 // Parent/Carer 2 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.

f) 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 on the sheet provided if necessary any details which may affect the assessment of the grant, for example a significant change in income or outgoings for the coming year.

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

ANNEX B

EDUCATIONAL TRUSTS

In addition to scholarships and bursaries, there are a number of charities and trusts which award grants for a wide range of reasons, including for educational purposes.

A number of these charities have been set up to address specific issues and so their grants will be for particular purposes and many are to support students in their studies.

A useful site to begin a search for assistance is: The Educational Trusts Forum www.educational-grants.org

This list is by no means extensive but here are a few you may wish to contact.

Foundations	Contact Details
The Duchess of Leeds Foundation The Duchess of Leeds Foundation 19 Kenton Road Harrow HA1 2BW.	Tel: 020 8422 1950
Buttle UK CC1.06 Kennington Park 1-3 Brixton Road SW9 6DE	Tel: 020 7828 7311 www.buttleuk.org
Reedham Children's Trust 23 Old Lodge Lane Purley Surrey CR8 4DJ	Tel: 020 8660 1461 www.reedhamchildrenstrust.org.uk
Royal National Children's Springboard Foundation McCarthy Denning 70 Mark Lane, London EC3R 7NQ	Tel: 01932 868622 Email: admin@royalspringboard.org.uk www.royalspringboard.org.uk
The King's Trust	www.kingstrust.org.uk 0800 842 842
The Ewelme Exhibition Endowment	www.ewelme-education-awards.info/

<p>The Emmott Foundation (for Sixth Form pupils) 10 Queen Street Place London EC4R 1AG Education Officers: Julie and Paul Spillane</p>	<p>Tel: 0207 9695500 E-mail: emmottfoundation@btinternet.com www.emmottfoundation.org</p>
<p>The Lloyd Foundation, Winchester House, Dean Gate Avenue, Taunton TA1 2UH</p>	<p>Tel: 07481 932077 Email secretary@thelloydfoundation.org.uk</p>