

For school use (please tick):

New applicant
Renewal

Service required:

Home visit
Zoom/Teams



MALVERN ST JAMES

Girls' School

BURSARY ADMINISTRATION LIMITED

on behalf of

_____ (School)

BURSARY APPLICATION FORM

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 the Data Protection Act 2018. 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 and the ICO regards your report as confidential and exempt from the provision of Subject Access Requests

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: _____

1. CHILD OF APPLICATION

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

2. APPLICANTS (see note 2)

- | | Parent/Carer 1 | Parent/Carer 2 |
|---------------------------------|-----------------------|-----------------------|
| a) Names and title | _____ | _____ |
| Date of birth | _____ | _____ |
| b) HOME Address | _____ | _____ |
| | _____ | _____ |
| | _____ | _____ |
| | _____ | _____ |
| | _____ | _____ |
| c) Home Tel | _____ | _____ |
| d) Mobile Tel | _____ | _____ |
| e) E-mail | _____ | _____ |
| f) Employer name | _____ | _____ |
| g) Occupation | _____ | _____ |
| h) Are you a Co. Director? | | |
| 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, NOT 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		
Repairs/maintenance		
Other Expenses		

EXPENDITURE	PER MONTH	PER YEAR
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 INCL SCHOOL LUNCHES		
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/CARER 1	PARENT/CARER 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)

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 SHREDDED 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***