



## **BURSARY POLICY**

### **MEANS TESTED BURSARIES**

*Rooted in Christ and Catholic tradition and under the guidance of its patron, St Edmund's aims to realise the God-given potential, in body, mind and spirit, of all members of its community through service and leadership.*

*Avita Pro Fide*

*St Edmund's is committed to ensuring the welfare and protection of children in their care and this commitment is a fundamental part of the role of every employee.*

### **Introduction**

This policy has been authorised by the Governing Body of St Edmund's College. Its status is advisory only. It is addressed to parents of students, prospective students and to all members of the teaching and administration staff.

This policy contains an overview of the bursary scheme currently in operation at the School. The policy, together with all ancillary documentation including a Confidential Statement of Financial Circumstances questionnaire, is made available to all parents and prospective parents on request.

The Governors of St Edmund's College 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 support, known as a bursary, may be awarded in the form of a discount of up to 100% of tuition fees payable, depending on the financial, compassionate, or other pertinent circumstances of applicants.

St Edmunds College is a registered charity that is committed to providing significant public benefit. The School is aware of its obligations under the Charities Act 2006 and seeks to adhere to the public benefit principles identified by the Charity Commission. This policy is reviewed regularly to take into consideration the latest guidance from the Charity Commission and any other factors relevant to this policy.

The School's bursary scheme is designed to assist parents or prospective parents on low incomes who for financial reasons might otherwise be unable to send their child to the School. Awards are subject to annual testing of parental means and may be varied upwards or downwards depending on parental circumstances. Awards are made based on a family's financial circumstances (e.g. their savings, investments and realisable assets, as well as their income), the size of their family, any other persons dependent upon them and like factors.

The value of individual bursaries ranges from 5% of tuition fees to full-fee bursaries, although the School would normally expect parents to make some contribution towards fees. All bursaries are fully means-tested and are assessed on a sliding scale depending on the parents' combined annual income, net assets and any other relevant information.



Requests for financial support usually fall into two categories:

- Prospective pupils to the School whose families would otherwise be unable to consider the School due to their financial circumstances; and
- Emergency bursaries, in a form of temporary assistance for existing pupils where a sudden unforeseen change in parents'/guardians' circumstances has resulted in difficulty in meeting tuition fees and may result in the child being withdrawn partway through a final key stage year of education. In such circumstances any award would normally only be available until the end of that Key Stage.

The School does not currently benefit from endowment trust funds to support bursaries and as such, funding is limited. Owing to the limited financial resources of the School to fund bursaries, **not every eligible application for a bursary will be successful.** The School has a duty to both benefactors and to the wider community of fee-paying parents to ensure that the limited funds available are awarded to the most deserving cases. In addition to the likely contribution of the pupil to the life of the School, other factors to be considered might include:

- current and projected income and expenditure
- the earning power of the family. For example, both parents would normally be expected to be employed, unless there is incapacity or a need to care for children under school age or other family dependents.
- the possibility of capital or equity release from savings, investments or housing
- in cases where parents are separated, the contribution an absent parent could be expected to make
- the possible contribution of other family members or outside sources
- the priorities of the parents. The School would see the payment of school fees as of higher priority than, for example, frequent or costly holidays, expensive cars or second homes.

Prospective parents wishing to apply for a bursary should contact the Admissions Department at [Admissions@stedmundscollege.org](mailto:Admissions@stedmundscollege.org) and request an application form. Existing parents should contact the Deputy Bursar at [ncastle@stedmundscollege.org](mailto:ncastle@stedmundscollege.org).

### **Confidentiality**

The School will always respect the confidentiality of bursary awards made to families and the School expects the same of recipients. Students will not be made aware that they benefit from a bursary unless informed by their parents.

### **The Application Process – General**

All bursaries are means-tested, and there are no exceptions to this. Bursaries will be awarded at the sole discretion of the Awards Committee, whose decision will be final. In addition to means-testing the Awards Committee will consider any other relevant circumstances and consider the likely contribution of the pupil to the St Edmund's community.



All applicants for a bursary are required to complete a confidential statement of financial circumstances questionnaire and provide any supplementary information as requested. It is crucial that Parents/Guardians answer all the questions carefully and in full and any incomplete applications will be returned. The questionnaire is designed to provide a full picture of the income and assets of applicants so that the Awards Committee can determine those to whom an offer of a bursary would be most beneficial. The School uses an independent specialist, Bursary Administration Ltd (BAL) to review finances on our behalf in some circumstances.

Bursaries awarded at the Prep School and the College will be valid for the duration of the pupil's time at the Prep School or the College and will be subject to an annual means test review. Nevertheless, should any of the information disclosed in response to the questionnaire become inaccurate later, the School must be informed without delay. Failure to disclose requested information or a change in circumstances to the School could lead to a bursary being withdrawn or withheld and repayment of amounts awarded.

Please note that families who may be classified as "low income" but have substantial assets may be ineligible to receive a bursary. Each bursary offer will reflect the particular circumstances of the recipient and will usually be expressed as a percentage remission of tuition fees.

### **The Application Process at 11+**

Bursaries may be made available to parents/guardians of children entering St Edmund's College at 11+ (see the College's admissions policy). Bursary awards will be entirely at the discretion of the Awards Committee and awards will be given to those pupils who are deemed to be in the greatest financial need and who have the greatest potential to benefit from, and contribute to, the full range of College activities.

Step one. Parents/guardians requesting a bursary are required to complete a Confidential Statement of Financial Circumstances form which seeks to establish the financial circumstances of the household. The form, which requests detail of income and capital, may be found in Appendix 1 and must be accompanied by full documentary evidence. The completed form, together with the necessary documentary evidence, is to be submitted to the Deputy Bursar no later than the published dates in the Admissions documentation in the year preceding entry to the College. Applications and supporting paperwork received after that date may not be considered. This form is intended to establish whether the household has sufficient means to pay all, some or none of the required College fees. Failure to include supporting documentation will automatically result in no offer of assistance due to our inability to complete the assessment.

Step Two. The College passes the completed application form and supporting documentation to BAL who will review the information supplied. This review will include a face to face meeting with parents at their home address. BAL then provide a recommendation regarding the bursary request to the College.



Step Three. The Bursar's Office will prepare an initial recommendation for consideration by the Awards Committee based on the information supplied and BAL recommendation. The application is discussed in full by the Committee and a final decision is reached.

Step Four. Following the entrance examination, the parents/guardians are advised whether their child is to be offered a place at the College and of the bursary offer, if any.

Step Five. Parents/guardians are then required to sign an acceptance form accepting the place at the College and a separate form confirming acceptance of the terms and conditions of the bursary award. (see Appendix 2).

### **The Application Process at 16+**

A limited number of bursaries may be made available to parents/guardians of children entering St Edmund's College at 16+ (see the College's admissions policy). They are awarded at the discretion of the Awards Committee.

Step One. Parents/guardians seeking a bursary are required to complete a Confidential Statement of Financial Circumstances form which seeks to establish the financial circumstances of the household. The form, which requests detail of income and capital, may be found in Appendix 1 and must be accompanied by full documentary evidence. The completed form, together with the necessary documentary evidence, is to be submitted to the Deputy Bursar no later than the published dates in the Admissions documentation in the academic year preceding entry to the College the following September. Applications and supporting paperwork received after that date may not be considered. This form is intended to establish whether the household has sufficient means to pay all, some, or none of the required school fees. Failure to include supporting documentation will automatically result in no offer of assistance due to our inability to complete the assessment.

Step Two. The College passes the completed application form and supporting documentation to BAL who will review the information supplied. This review will include a face to face meeting with parents at their home address. BAL then provide a recommendation regarding the bursary request to the College.

Step Three. The Bursar's Office will prepare an initial recommendation for consideration by the Awards Committee based on the information supplied and BAL recommendation. The application is discussed in full by the Committee and a final decision is reached.

Step Four. The parents/guardians are advised whether their child is to be offered a place at the College (subject to GCSE results) after the child has been interviewed and a reference received from their current school. If a bursary award is to be granted, the parents/guardians will be advised of the amount at the same time as the offer of a place.



Step Five. Parents/guardians are then required to sign an acceptance form accepting the place at the College and a separate form confirming acceptance of the terms and conditions of the bursary award (see Appendix 2)

### **The Case for Assistance**

Having established the financial need, the Awards Committee allocates the available bursary funds. The Committee will make awards that enable children to attend the School, rather than simply dividing limited funds between all applicants and expecting parents to fund the shortfall. The Awards Committee will consider several factors when making the judgement as to the justification for support, and the extent of such support.

Suitability. In assessing a child's ability, attention will be given to the academic assessment results of each applicant; potential will also be considered as well as actual achievement. As bursary funds are limited those judged most likely to gain from the educational provision will be given priority. Each student considered must, in the opinion of the Headmaster, be likely to make sound academic progress following admission and possess the potential to benefit from participation in the wider, extracurricular activities on offer at the School. Each applicant should meet the School's normal academic requirements. Previous school reports will be considered for evidence of good behaviour and achievement.

Religious belief. Priority will be given to practising Roman Catholics.

Financial limitations. The amount of the bursary 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 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 awards are awarded appropriately and so, as well as current earnings, other factors which will be considered in determining the necessary level of grant 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 adult related to the child or by outside sources.
- Where fees are being paid to other schools (or universities) the School's grants 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:
  - household income net of essential expenditure in excess of the level of fees payable.



- frequent or expensive holidays
- new or luxury cars
- investment in significant home improvements
- a second property/landholdings
- higher than average non-contractual pension contributions
- significant equity in the main family residence or ability to downsize
- outstanding school fees payable to other educational establishments

The award of a bursary for one child does not necessarily guarantee awards to siblings already in the School or subsequently admitted to the School.

#### 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
- Where a parent/guardian is terminally ill or, because of poor health, is unable to secure permanent employment.

#### **Existing Students - 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 (such as those arising from illness or bereavement) or where applications meriting bursary assistance are received out of the normal cycle of 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 Deputy Bursar explaining the situation and using the form at Appendix 3. Applications for hardship/ emergency bursaries will be considered by the Bursary Awards Committee as soon as possible after the application has been received. The Awards Committee will be sympathetic to changes in family circumstances but any application submitted for these reasons is means-tested in the same way as any other award. Parents/guardians should be aware that such awards are subject to the availability of funding and cannot be guaranteed.

#### Expectations of all Award holders

- 1) Award holders are expected to show commitment to the College or Prep School
- 2) Award holders are expected to set a lead among their peer group in relation to behaviour, leadership and attitude.
- 3) Award holders are expected to achieve consistently strong grades for effort across the entire range of subjects, as well as high levels of achievement (as appropriate to the individual)
- 4) Award holders are expected to promote their particular area(s) of expertise among their peer group
- 5) In return, the School provides opportunities for award holders to maximise their potential and to develop their skills and expertise to the best of their ability





## **Annual Review**

All bursary awards are reviewed at least annually, and all Parents/Guardians are required to submit new, up-to-date financial information to support their annual applications, based on which the award may be increased, reduced or withdrawn at the discretion of the Awards Committee. Parents/Guardians are also required to inform the School immediately of any change in their financial circumstances while a bursary is being provided. Failure to divulge requested information or a change in circumstances to the School could lead to a bursary being withdrawn or withheld or a request for repayment made. Current bursary holders will be issued with repeat means testing forms in January each year to return by the end of February. These will be reviewed by the Awards Committee each year during the Lent Term, for the following academic year. For those in receipt of bursaries, the Awards Committee can reduce or withdraw an award not only because of an improvement in financial circumstances but also where pupils progress, attitude and behaviour has been unsatisfactory or where the parents/guardians have failed to support the School, for example by the late payment of any contribution they make to the fees. For the avoidance of doubt parents failing to pay the termly net fees, after deduction of the advised and agreed bursary, on time in accordance with the School's terms and conditions may have their advised and agreed bursary withdrawn.

## **Other Sources of Bursary Assistance**

In addition to the School's bursary funds, there are a few educational and charitable trusts which help with tuition fees. In most cases, these are to assist children who are already attending fee-paying schools and due to a change of circumstances may be unable to remain. St Edmund's College encourages parents/guardians to apply for support where it is felt a good case can be made for assistance. Further information on how to pursue such assistance may be obtained from: <https://educational-grants.org/>

## **Data Protection**

The School processes all personal data (which includes the information supplied to the School as part of the Bursary eligibility process) in accordance with data protection law. Please see the School's Privacy Policy on the School's website for more information about how the School processes personal data about individuals.

## **Conditions of Award**

The Conditions of Award take precedence over any of the elements of the School's Parent Contract which are inconsistent with them but in all other respects the School's Parent Contract as amended from time to time shall apply and these Conditions of Award shall be interpreted in accordance with it.

Owner of policy:	Bursar		
Reviewed by:	Headmaster		
Frequency of review:	Every 3 Years		
Policy last reviewed:	Trinity	2025	
Next review date:	Trinity	2028	
Sub-Committee reviewed at:	Finance Sub-Committee		



ST EDMUND'S COLLEGE  
& PREP SCHOOL

# APPENDIX 1

## BURSARY APPLICATION FORM

**Confidential Statement of Financial Circumstances In Support of  
Application For Bursary Award**

**DRAFT**

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



## **ASSESSING YOUR APPLICATION**

The college 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**

**DRAFT**  
PRIVACY POLICY AND NOTICE

#### **Introduction**

Bursary Administration Limited (BAL) has been registered with the Information Commissioner's Office (ICO) since 13<sup>th</sup> 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](mailto: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 and sent 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](mailto: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 regard 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](mailto:liz@schoolbursaryguide.com)

**I/we acknowledge and understand the above:**

PARENT/CARER 1

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PARENT/CARER 2

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THIRD PARTY

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THIRD PARTY

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Date: \_\_\_\_\_

**Please use this page to add any information which you feel is relevant to your application** (see note 6 at the end of this document)

DRAFT



## 1 PUPIL 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 \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**DRAFT**

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)

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)		
<b>BENEFITS:</b>		
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		

**DRAFT**

RENTAL PROPERTIES (IF ANY, NOT THE FAMILY HOME)	PER MONTH	PER YEAR
<b>INCOME</b>		
RENTAL INCOME		
<b>EXPENDITURE</b>		
MORTGAGE		
AGENT'S FEES		
<b>OTHER EXPENSES:</b>		
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 BILLS		
FOOD <b>INCL</b> 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:







## 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

Any other appropriate documents to support your application

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- 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:  
**Nichola Castle** at [ncastle@stedmundscollege.org](mailto:ncastle@stedmundscollege.org)

## GUIDANCE NOTES

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### 2. APPLICANTS

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

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- 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**

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## APPENDIX 2

### Scholarship, Exhibition or Bursary: Conditions of Award

1. **Grant of the award:** An award is granted at the sole discretion of St Edmund's College (the **College**).
2. **Obligations of the Pupil:** The Pupil who is the subject of an award is required to work hard, to contribute positively to the life of the College, to be a credit to the College and to set a good example to other pupils. The Pupil must adhere to the College's required standards of conduct and progress. These are the **Purposes of the Award**.

It is expected that if a student is selected for a sports team, music performance, the College production or other similar commitments that they will participate. On the rare occasions where attendance is not possible, permission must be sought from the College in advance.

3. **Obligation of the Parents:** The Parents are required to:
  - 3.1 support and encourage the Pupil to achieve the Purposes of the Award; and
  - 3.2 treat members of the College community reasonably and to uphold the aims and the good name of the College; and
  - 3.3 comply with the College's Terms and Conditions.
4. **Means tested awards:** All means tested awards will be subject to annual review and the Parents shall each year be required to complete a financial means questionnaire. After any annual review, the College reserves the right to vary the value of the award with immediate effect and will confirm the new value in writing to the Parents.
5. **Continuation of the award:** Continuation of the award is dependent upon the following conditions being fulfilled:
  - 5.1 in the case of a means tested award, the Parents satisfying the College's financial requirements each year; and / or
  - 5.2 in respect of all awards:
    - 5.2.1 the financial resources allocated by the College to support the award being sufficient to maintain the award; and
    - 5.2.2 it being in the financial interests of the College to maintain the award; or
    - 5.2.3 the Pupil complying with the obligations set out in clause 2 above. (Please also see clause 7.2.1 below.)

6. **Confidentiality:** The value and terms and conditions of the award shall remain confidential to the Parents and the Pupil and the College.
7. **Termination of the award:** The award may be terminated on the following grounds:
- 7.1 **termination on financial grounds:** the College may terminate the award on one Term's notice in writing if, in the opinion of the College Governors acting in good faith:
- 7.1.1 the Parents have not satisfied the College's financial requirements under clause 4 and clause 5.1; or
- 7.1.2 the College is no longer able to continue the award under clause 5.2. The termination shall take effect from the date set out in the written notice;
- 7.2 **termination on the grounds of conduct:** the College may terminate the award by written notice sent to the Parents with immediate effect if, in the opinion of the College Governors acting in good faith, one or more of the following conditions has been fulfilled:
- 7.2.1 the Pupil has not complied with the obligations set out in clause 2 and in the further opinion of the Governors there has been no significant improvement following consultation with the Parents and / or the Pupil and the issue of a written warning; or
- 7.2.2 the Parents have not complied with the obligations set out in clause 3; or
- 7.2.3 the Parents or the Pupil do not keep the terms and conditions of the award confidential in accordance with clause 6; or
- 7.2.4 the Parents will draw the Pupil from the College without providing proper Notice;
- 7.3 **repayment of the award:** the Parents will be required to repay all or part of the benefits received under the award if it is terminated in any of the following circumstances:
- 7.3.1 under clause 7.1.1 if the Parents have knowingly or recklessly provided false or inaccurate information about their financial position, all benefits received from the date on which the false or inaccurate information was supplied may be repayable; or
- 7.3.2 under clause 7.2.1 if the Pupil has been found to have committed a serious breach or series of persistent minor breaches of discipline for which the sanction would normally be Expulsion or required Removal, up to three Terms' benefits (if received) may be repayable.



- 8 **Cancellation and Withdrawal:** For the avoidance of doubt, the benefit receivable under an award will not apply to the Parents' liability to pay the first Term's Fees if less than a Term's Written Notice of Cancellation is given, or to any Term for which the College requires payment of Fees in lieu of Notice following Withdrawal without proper Notice.
- 9 **Conditions of Award:** These Conditions of Award take precedence over any of the College's Terms and Conditions which are inconsistent with them but in all other respects the College's Terms and Conditions as amended from time to time shall apply and these Conditions of Award shall be interpreted in accordance with them.

We/I have read and understood the above terms and conditions and accept the offer of the award for our/my child.

Name of child \_\_\_\_\_

Signed Parent/Guardian \_\_\_\_\_ Date \_\_\_\_\_

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Signed Parent/Guardian \_\_\_\_\_ Date \_\_\_\_\_

**Please sign and date both copies of this form and return one to:**

**Bursar, St Edmund's College, Old Hall Green, Ware, Herts, SG11 1DS**



**ST EDMUND'S COLLEGE  
& PREP SCHOOL**

## **APPENDIX 3**

### **BURSARY APPLICATION FORM**

**Confidential Statement of Financial Circumstances In Support of an  
Application For a Bursary Award**

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

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1. PUPIL 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) <b>HOME</b> 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		

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

<b>INCOME</b>	<b>PER MONTH</b>	<b>PER YEAR</b>
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)		
<b>BENEFITS:</b>		
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		

<b>RENTAL PROPERTIES OF ANY, NOT THE FAMILY HOME</b>	<b>PER MONTH</b>	<b>PER YEAR</b>
<b>INCOME</b>		
RENTAL INCOME		
<b>EXPENDITURE</b>		
MORTGAGE		
AGENT'S FEES		
<b>OTHER EXPENSES:</b>		
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 <u>INCL</u> 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



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

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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 (MORTGAGES OWED)	PARENT/CAREER 1	PARENT/CAREER 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:**

[illegible]

**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)


**DRAFT**

## **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**

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