

Office Use

|  |  |
| --- | --- |
| CSS code | Pupil Surname |
| Date received | Applicant Surname |
| Date complete: | Finance Check Completed: |
| Bursary Committee Completed: | Decision and date: |

# Bursary Application Form – School Year 20-21

**Guidance for completing this form**

* Completed bursary applications for the 2020–2021 school year, together **with all supporting evidence,** must be received at the school no later than **Monday 1st June 2019.** Applications received after this date will only be considered if agreement has been reached in advance.
* Children in receipt of Early Years Funding (EYF) **may** be eligible for a bursary for terms in which EYF is claimed (the term following a child’s third birthday until the term after their fifth birthday) on any fees paid over and above the EYF. Please indicate below when EYF will apply.
* Please use the checklist at the back of this form to ensure all copies of requested documents have been included.
* Applications can only be assessed from the date they are received completed **with all required information.**
* Please supply photocopies of requested documents **only** (documentation will not be returned).

Please see our current Bursary Policy downloadable from the school website or reception for full details of the bursary scheme.

**The following principles apply**

* The school’s decision is final and is made at the absolute discretion of the school.
* We offer a bursary on the principle that it is the **last resort** for funding of school fees. Applicants must consider all other possible sources of funding before turning to the school.
* The school has a finite/limited budget for fee assistance through the Community Bursary Fund especially given the financial difficulties we all face at present.
* Consideration will be given to all applicants, current recipients of a bursary, families already in the school and new applicants.
* **State Benefits:** It is a requirement of our fee assistance programme that you must apply for all state benefits to which you are entitled **before** seeking a bursary. We require copies of the relevant award notices, as stated on the form. We will not accept forms where the state benefit section is incomplete.
* Families are expected to have explored every avenue to increase their income including claiming all benefits to which they may be entitled.
* Families whose income is reduced by a lifestyle choice will not be eligible.
* Parents who apply for discounts are expected to make reasonable endeavours to obtain a contribution to school fees and living costs from the other/absent parent.

**Granting of a Bursary is subject to the following conditions**

* Payment of remaining fees is by ten equal monthly amounts paid by standing order commencing on the first day of Autumn Term, 2nd September 2020 (unless by other agreement with the school).
* All prior debts to the school are either repaid or subject to an agreed repayment plan.
* The school will conduct a detailed audit of a sample of recipients which may include a home visit.

**All families are required to submit bank statements for all current account/s for a three month period prior to submission of this Bursary Application Form, in addition to the items requested below.**

## SECTION A – PUPIL AND PARENT DETAILS

Please tick here if you have **applied** for a bursary in the last two years ❑ (tick box)

Please tick here if you are **in receipt** of bursary for the current school year ❑ (tick box)

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Full name of each pupil | Class/Kindergarten from Sept 2020 | For kindergarten, please indicate attendance from Sept 2020 | | | Will this change during this academic year? If so, how? | Please indicate if Early Years Funding will be used this year? | |
|  |  |  | Am | Pm |  | Autumn Term | Y / N |
| Mon |  |  |
| Tue |  |  | Spring Term | Y / N |
| Wed |  |  |
| Thu |  |  | Summer Term | Y / N |
| Fri |  |  |
|  |  |  | Am | Pm |  | Autumn Term | Y / N |
| Mon |  |  |
| Tue |  |  | Spring Term | Y / N |
| Wed |  |  |
| Thu |  |  | Summer Term | Y / N |
| Fri |  |  |
|  |  |  | Am | Pm |  | Autumn Term | Y / N |
| Mon |  |  |
| Tue |  |  | Spring Term | Y / N |
| Wed |  |  |
| Thu |  |  | Summer Term | Y / N |
| Fri |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
|  | Full name of parent/guardian and partners **who share the pupil’s/pupils’ main address** | Relationship to pupil(s) (eg. mother, step-father, father’s partner) | Daytime phone number |
| 1. |  |  |  |
| 2. |  |  |  |

|  |  |
| --- | --- |
| Parent/Guardian 1 Name:  Address:  Postcode:  Email address:  Number of other children under 18 resident:  % of time pupil(s) spend at this address: | Parent/Guardian 2 Name:  Address:  Postcode:  Email address:  Number of other children under 18 resident:  % of time pupil(s) spend at this address: |

## SECTION B – INCOME FROM EMPLOYMENT

Include here income earned as an **employee**. Do not include self-employed income or income from any company of which you own more than 25% of the shares.

|  |  |  |
| --- | --- | --- |
|  | **Parent/Guardian 1** | **Parent/Guardian 2** |
| **Name** |  |  |
| **Occupation** |  |  |
| **No of hours per week worked** |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Parent/Guardian 1** | **Parent/Guardian 2** | **Documentation required** |  | *Office use only* |
| Current gross annual income | £ | £ | **Most recent payslip** |  |  |
| Tax payable |  |  | **Most recent payslip or P60** |  |  |
| National Insurance |  |  | **Most recent payslip or P60** |  |  |

## SECTION C – SELF EMPLOYED INCOME

Complete this section if you are **self-employed** but do not own a limited company.

|  |
| --- |
| Nature of self-employed activity: |
| When did you commence this activity: |
| Do you have any business partners? If so, please provide details: |

Self employed income must be verified by the provision of the following documentation in all cases:

1. Business accounts
2. A copy of your full tax returns for the last two tax years
3. Management accounts for the current year **or** personal current bank statements for the period 1st September 2019 to 1st March 2020

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Provide **ANNUA**L figures: | **Parent/Guardian 1** | **Parent/Guardian 2** | **Documentation required** |  | *Office use only* |
| Actual **gross** income – average of last two years | £ | £ | **Most recent payslip or P60** |  |  |
| Tax payable | £ | £ | **Most recent payslip or P60** |  |  |
| National Insurance payable | £ | £ | **Most recent payslip or P60** |  |  |

## SECTION D – INCOME FROM YOUR OWN COMPANY OR LLP

Please complete this section if you **own** **25% or more of a company or LLP.**

|  |  |  |
| --- | --- | --- |
| **Name of company** | **Company number** | **Date of incorporation** |
|  |  |  |

**Business activity of company**

|  |
| --- |
|  |

**Ownership details (include names of shareholders and indicate if other shareholders are related to you)**

|  |
| --- |
|  |

**Limited company and LLP income must be verified by the provision of the following documentation in all cases:**

1. Financial accounts
2. A copy of your full tax returns for the last two tax years
3. Management figures for the period from the company year-end to January 2020

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Provide **ANNUAL** figures: | **Parent/Guardian 1** | **Parent/Guardian 2** | **Documentation required** |  | *Office use only* |
| **Salary** drawn - average of last two years | £ | £ | **Most recent payslip or P60** |  |  |
| Dividend income – average of last two years | £ | £ | **Most recent payslip or P60** |  |  |
| Any other cash drawings – average of last two years | £ | £ | **Most recent payslip or P60** |  |  |
| Tax payable for 2018/19 | £ | £ | **Most recent payslip or P60** |  |  |
| National Insurance paid for 2018/19 | £ | £ | **Most recent payslip or P60** |  |  |

## SECTION E – WORK RELATED CHILDCARE COSTS

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Childcare costs incurred solely for the purpose of work | £ | £ | **Receipts or invoices for 2019-20 tax year** |  |  |

## SECTION F – INCOME FROM STATE BENEFITS

It is a mandatory requirement of fee assistance that applicants apply for, obtain and declare all state benefits to which they are entitled before requesting fee assistance. Please see guidelines on page one for further information in filling out this section.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Provide **ANNUAL** figures: | **Parent/Guardian 1** | **Parent/Guardian 2** | **Documentation required** |  | *Office use only* |
| Child benefit | £ | £ | **Latest award notice** |  |  |
| Child tax credit | £ | £ | **Latest award notice** |  |  |
| Working tax credit | £ | £ | **Latest award notice** |  |  |
| Housing benefit | £ | £ | **Latest award notice** |  |  |
| Council tax benefit | £ | £ | **Latest award notice** |  |  |
| Income support | £ | £ | **Latest award notice** |  |  |
| Job seekers allowance | £ | £ | **Latest award notice** |  |  |
| Widow/ers benefit | £ | £ | **Latest award notice** |  |  |
| Other state benefit | £ | £ | **Latest award notice** |  |  |

## SECTION G – OTHER INCOME

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Provide **ANNUAL** figures: | **Parent/Guardian 1** | **Parent/Guardian 2** | **Documentation required** |  | *Office use only* |
| Income from lodgers | £ | £ | **Relevant bank statement with income highlighted** |  |  |
| Any sum over £200 in aggregate that you receive from friends or family, including payment of school fees | £ | £ | **Relevant bank statement with income highlighted** |  |  |
| Any other income including investment, pension etc | £ | £ | **Copy of recent statement** |  |  |
|  | | | | | |
| **Details of other income:** |  | | | | |

## SECTION H – DETAILS OF PUPILS’ MAIN RESIDENCE

**Homeowners** - Complete the following if you **own** or part-own the property that you live in.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  | **Documentation required** |  | *Office use only* |
| Market value of the property | £ | **Valuation if available** |  |  |
| Mortgage outstanding | £ | **Latest statement** |  |  |
| Mortgage CAPITAL payment for last 12 months | £ |  |  |
| Mortgage INTEREST payment for last 12 months | £ |  |  |
| Annual Council Tax payable | £ | **Latest advice notice** |  |  |

**Tenants** - Complete the following if you are a **tenant** in the property that you live in.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Current Annual Rent | £ | **Rental agreement** |  |  |
| Annual Council Tax payable | £ | **Latest advice notice** |  |  |

## SECTION I – SECOND AND SUBSEQUENT PROPERTIES

Please complete this section if you own or part-own a property **which is not your main residence**. If you own two or more such properties, provide aggregate figures.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Parent/Guardian 1** | **Parent/Guardian 2** | **Documentation required** |  | *Office use only* |
| Market value of property | £ | £ | **Valuation if available** |  |  |
| Mortgage outstanding | £ | £ | **Latest statement** |  |  |
| Mortgage CAPITAL payment for last 12 months | £ | £ |  |  |
| Mortgage INTEREST payment for last 12 months | £ | £ |  |  |
| Gross annual rental income before tax (if any) | £ | £ | **Accounts** |  |  |

|  |
| --- |
| **Address of second or subsequent property/ies:** |

|  |
| --- |
| **If you part-own this property, please give details of the % owned, other owners and their relationship to you:** |

## SECTION J – OTHER CAPITAL ASSETS

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Parent/Guardian 1** | **Parent/Guardian 2** | **Documentation required** |  | *Office use only* |
| Savings accounts | £ | £ | **Latest statement** |  |  |
| Savings bonds or similar | £ | £ | **Latest statement** |  |  |
| Stock market investments | £ | £ | **Latest valuation** |  |  |
| Other significant assets\* total | £ | £ | **Please complete sections below** |  |  |

\*Other significant assets include any items you own worth more than £1,000 eg. vehicles, jewellery, art, furniture, electronic equipment etc (please detail below and continue on a separate sheet if necessary).

|  |  |
| --- | --- |
| **Item Description** | **Current Value** |
|  | £ |
|  | £ |
|  | £ |
|  | £ |
|  | £ |
|  | £ |
|  | £ |

**Please detail here all vehicles you own (whether outright or through lease/PCP and regardless of value):**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Vehicle make, model & registration number | Date of purchase | Current value | Outstanding finance | **Documentation required** |  | *Office use only* |
|  |  | £ | £ | **Purchase invoice and/or finance agreement** |  |  |
|  |  | £ | £ | **Purchase invoice and/or finance agreement** |  |  |
|  |  | £ | £ | **Purchase invoice and/or finance agreement** |  |  |

## SECTION K – MAINTENANCE INCOME

*Please complete this section if you are* ***separated*** *from your child/ren’s other parent.*

We expect parents who apply for fee assistance to use reasonable endeavours to obtain a contribution to school fees and living costs from the absent parent.

**When did you or your child/ren last have contact with your ex-partner?**

Regular contact ❑ in the last 12 months ❑ in the last three years ❑ more than three years ago ❑

**Are you in receipt of any of the following from your ex-partner?**

|  |  |  |
| --- | --- | --- |
|  | Amount per year | **Documentation required** |
| A contribution to school fees | £ | **Relevant bank statement with income highlighted** |
| Maintenance income to cover living costs | £ | **Relevant bank statement with income highlighted** |

|  |
| --- |
| Contribution in kind, please give details: |

Are you satisfied that your ex-partner is making reasonable overall contribution to the costs you incur in relation to your child or children? Yes ❑ No ❑

|  |
| --- |
| If no, please outline the attempts you have made to enforce payment of maintenance: |

## SECTION L – OTHER INFORMATION

Please use this space below to provide any further details which you feel may be useful in processing your application for fee assistance, including any other information about your personal financial situation that has not been covered above.

|  |
| --- |
|  |

## DECLARATION

|  |  |
| --- | --- |
| I declare that the information provided on this form is a complete and truthful statement of (i) my income from all sources and (ii) my assets of all kinds.  I undertake to adhere to the conditions set out in the Bursary Policy (available online and from reception) and understand that any bursary awarded may be withdrawn if I break these terms.  I agree that if any information provided by me is found to be false or incomplete, any and all fee discounts granted by the school will become immediately repayable as a debt.  I undertake to notify the school immediately should there be any material change to my financial circumstances. I understand that any bursary offered may be amended or withdrawn in this case.  If granted fee assistance, I agree to make fee payments in full and on time, by monthly standing order or in accordance with the payment method and timetable agreed by the school.  I agree to be jointly and severally liable for this undertaking with Parent/Guardian 1/2. | |
| **Parent/Guardian 1** | **Parent Guardian 2** |
| Full name: | Full name: |
| Signature: | Signature: |
| Relationship to pupil: | Relationship to pupil: |
| Date: | Date: |

**Please return your form to Nicola Conlin, no later than Monday 1st June 2020 in an envelope clearly marked ‘Confidential - Fee Assistance Application [and date]’.**

If you have any queries about this form or the bursary application process, please contact David on David.Harrison@cambridge-steiner-school.co.uk.

## DOCUMENT CHECKLIST

Please use this list to ensure that you include all supporting documentation as incomplete applications cannot be processed.

|  |  |  |
| --- | --- | --- |
| **Section** | **Document copy required** | **Enclosed?** |
| All applicants | Bank statements for all current account/s covering the period 1st January 2020 to 31st March 2020 |  |
| B Income from employment | Most recent payslip |  |
|  | P60 for 2019-20 (or 2018-19 if recent P60 is not yet available) |  |
| C Self-employed income | Business accounts for 2018-19 and 2019- 20 |  |
|  | Full tax returns for 2017-18 and 2018-19 |  |
|  | Management accounts for the current tax year OR personal current bank statements for the period 1st September 2019 to 1st March 2020 |  |
| D Income from company/LLP | Financial accounts for 2017-18and 2018-19 |  |
|  | Full tax returns for 2017-18 and 2018-19 |  |
|  | Management figures from company year-end to January 2020 |  |
| E Childcare costs | Receipts/invoices for 2019-20 tax year |  |
| F State benefits | Latest child benefit award notice |  |
|  | Latest child tax credit award notice |  |
|  | Latest working tax credit award notice |  |
|  | Latest housing benefit award notice |  |
|  | Latest council tax benefit award notice |  |
|  | Latest income support award notice |  |
|  | Latest job seekers allowance award notice |  |
|  | Latest widow/ers benefit award notice |  |
|  | Other state benefit award notices where relevant |  |
| G Other income | Bank statement with income from lodgers highlighted |  |
|  | Bank statement with income from friends/family over £200 highlighted |  |
|  | Latest statement for other income/ investments/ pension etc |  |
| H Homeowners | House valuation if available |  |
|  | Latest mortgage statement |  |
|  | Latest council tax advice notice |  |
| H Tenants | Rental agreement |  |
|  | Latest council tax advice notice |  |
| I Second and subsequent properties | House valuation if available |  |
|  | Latest mortgage statement |  |
|  | Rental income accounts |  |
| J Other capital assets | Latest statement for savings/ bonds/ stock market investments/ other significant assets |  |
|  | Car purchase invoice and/or finance agreement |  |
| K Maintenance income | Bank statement with income from ex-partner highlighted |  |

**END**