**Bursary Application Form - ACADEMIC YEAR 2022-23**

**Answer all the questions or cross through if not applicable.**

**1. Child**

*Provide details of the child applying to the school.*

|  |  |
| --- | --- |
| Full name |  |
| Date of birth |  |
| Year of entry |  |
| Current school |  |
| Residency status\* |  |

*(\*please note that priority will be given to those applicants who are a UK resident and have been settled in the UK for at least three years)*

**2. Parents/guardians**

*Provide details of the parents/guardians who are submitting the application. Details provided must be those of the child’s legal parents/guardians and information must be provided for two persons, if the parents are separated or divorced both the mother and father are required to complete the application form.*

|  |  |  |
| --- | --- | --- |
|  | **Father/step-father/guardian** | **Mother/step-mother/guardian** |
| Full name |  |  |
| Title |  |  |
| Address |  |  |
| Residency status\* |  |  |
| Daytime telephone |  |  |
| Evening telephone |  |  |
| Mobile telephone |  |  |
| E mail address |  |  |
| Occupation status | Retired/employed/self-employed/ unemployed/business owner  *(please circle whichever applies)* | Retired/employed/self-employed/  unemployed/business owner  *(please circle whichever applies)* |
| Job title |  |  |
| Name and address of either your employer or your own business/company |  |  |
| Are you a director or proprietor of this business/company? | yes/no | yes/no |
| If yes, when is your business year end |  |  |

**3a. Father’s/step-father’s/guardian’s income**

*Please enter below your gross current earnings and expected income per year from all sources for 2021 and 2022.*

|  |  |  |
| --- | --- | --- |
|  | **Actual figures for tax year ended April 2021** | **Estimated full year figures for current tax year ending April 2022** |
| Gross salary *(i.e. before deductions for tax)* |  |  |
| Taxable benefits |  |  |
| Bonus payments |  |  |
| Gross profits of your own business/company |  |  |
| Gross pension, widow’s pension, etc. |  |  |
| Gross investment income from:  e.g. building society/dividends/interest |  |  |
| Dividends from your own business or company |  |  |
| Gross rental income from property |  |  |
| Separation/maintenance allowance/child support |  |  |
| Job seekers allowance |  |  |
| Income support |  |  |
| Child benefit |  |  |
| Working tax credit |  |  |
| Child tax credit |  |  |
| Council tax benefit/housing benefit |  |  |
| Universal tax credit |  |  |
| Any other social security benefits |  |  |
| Any other income |  |  |
| **TOTAL INCOME** | **£** | **£** |

**3b. Father’s/step-father’s/guardian’s expenditure**

*Please enter below your expenditure per year for 2021 and 2022.*

|  |  |  |
| --- | --- | --- |
|  | **Actual figures for tax year ended April 2021** | **Estimated full year figures for current tax year ending April 2022** |
| Tax payable on total income  *(including tax deducted at source)* |  |  |
| National insurance contributions |  |  |
| Pension contributions |  |  |
| Mortgage interest  *(include capital repayment as well as interest)* |  |  |
| Any other interest payable  *(please specify)* |  |  |
| Annual landlord rent payable on main residence |  |  |
| **TOTAL EXPENDITURE** | **£** | **£** |

**4a. Mother’s/step-mother’s/guardian’s income**

*Please enter below your gross current earnings and expected income per year from all sources for 2021 and 2022.*

|  |  |  |
| --- | --- | --- |
|  | **Actual figures for tax year ended April 2021** | **Estimated full year figures for current tax year ending April 2022** |
| Gross salary *(i.e. before deductions for tax)* |  |  |
| Taxable benefits |  |  |
| Bonus payments |  |  |
| Gross profits of your own business/company |  |  |
| Gross pension, widow’s pension, etc. |  |  |
| Gross investment income from:  e.g. building society/dividends/interest |  |  |
| Dividends from your own business or company |  |  |
| Gross rental income from property |  |  |
| Separation/maintenance allowance/child support |  |  |
| Job seekers allowance |  |  |
| Income support |  |  |
| Child benefit |  |  |
| Working tax credit |  |  |
| Child tax credit |  |  |
| Council tax benefit/housing benefit |  |  |
| Universal tax credit |  |  |
| Any other social security benefits |  |  |
| Any other income |  |  |
| **TOTAL INCOME** | **£** | **£** |

**4b. Mother’s/step-mother’s/guardian’s expenditure**

*Please enter below your expenditure per year for 2021 and 2022.*

|  |  |  |
| --- | --- | --- |
|  | **Actual figures for tax year ended April 2021** | **Estimated full year figures for current tax year ending April 2022** |
| Tax payable on total income  *(including tax deducted at source)* |  |  |
| National insurance contributions |  |  |
| Pension contributions |  |  |
| Mortgage interest  *(include capital repayment as well as interest)* |  |  |
| Any other interest payable  *(please specify)* |  |  |
| Annual landlord rent payable on main residence |  |  |
| **TOTAL EXPENDITURE** | **£** | **£** |

**5. Assets**

*In addition to taking account of all relevant sources of income, the school takes into account all of your assets.*

|  |  |  |
| --- | --- | --- |
|  | **Father/step-father/guardian** | **Mother/step-mother/guardian** |
| Approximate market value of all investments  • Building society/bank deposits  • Equity investments, stocks, shares  • PEPs, ISAs  • Other investments |  |  |
| Approximate market value of main residence |  |  |
| Approximate market value of other possessions  *(house contents, cars etc)* |  |  |
| Cash at banks or elsewhere  *(if not listed elsewhere on this form)* |  |  |
| Approximate market value of any other assets  *(please specify and include the market value of any insurance policies maturing in this tax year or the last five years)* |  |  |
| Net worth/value of any business which you own or share |  |  |
| Approximate market value of any other properties owned either at home or abroad |  |  |
| Redundancy, employment separation or lump sum payments |  |  |
| Overseas savings, assets or business interests |  |  |
| **TOTAL ASSETS** | **£** | **£** |

**6. Liabilities**

*Please provide details of your liabilities.*

|  |  |  |
| --- | --- | --- |
|  | **Father/step-father/guardian** | **Mother/step-mother/guardian** |
| Mortgage – amount outstanding on house |  |  |
| Loans  *(please specify)* |  |  |
| Credit cards |  |  |
| **TOTAL LIABILITIES** | **£** | **£** |

|  |
| --- |
| You should indicate below any reasons why net assets cannot be converted or used to pay school fees. |

**7. Other assets and income**

*Provide information on any other assets or sources of income not included above (circle whichever applies).*

|  |  |  |
| --- | --- | --- |
|  | **Father/step-father/guardian**  **£** | **Mother/step-mother/guardian**  **£** |
| In UK | yes/no | yes/no |
| Abroad | yes/no | yes/no |

**8. Main residence**

*Please state whether it is:*

|  |  |  |
| --- | --- | --- |
| Owned with a mortgage | yes/no | If yes, monthly payment is £ |
| Owned with no mortgage | yes/no |  |
| Rented | yes/no | If yes, monthly rent is £ |
| Do you receive any housing benefit or council tax benefit? | yes/no | If yes, monthly amount is £ |
| Which council tax band is the house in? |  | |

**9a. Dependent children**

*Provide information on any children other than that which this application refers to. This includes children who are unmarried and at a school, university or other educational institution.*

|  |  |  |  |
| --- | --- | --- | --- |
|  | **1** | **2** | **3** |
| a) Forename |  |  |  |
| b) Date of birth |  |  |  |
| c) School or college |  |  |  |
| d) Boarding or day |  |  |  |
| e) Annual school or other educational fees  *(excluding extras and sundry disbursements)* |  |  |  |
| f) Compulsory additional school charges |  |  |  |
| g) Amount of fees shown in (e) covered by: |  |  |  |
| i) Scholarships, bursaries or allowances given by school |  |  |  |
| ii) Annual sum arising from capital repayment scheme |  |  |  |
| iii) Services/diplomatic/company education allowances (gross) *(please state whether the sum has been included in gross salary at 3a or 4a)* |  |  |  |
| iv) Annual sum arising from educational insurance policies |  |  |  |
| v) Assistance from any other sources e.g.: grandparents, trusts, settlements etc. *(please specify)* |  |  |  |
| vi) Annual income of child |  |  |  |
| vii) Capital value of trust |  |  |  |

*Details requested regarding fees and bursaries received on behalf of your other children are for information only and will not normally be taken into account in the assessment of the level of bursary awarded.*

**9b. Free school meals**

*If yes, please provide evidence.*

|  |  |
| --- | --- |
| Do any of your children, including the applicant, receive free school dinners? | yes/no |

**10. Other dependents**

*Please provide details below. If you qualify for a carer’s allowance, or have an aged grandparent or relative living with you or dependent upon you, please provide details including age, address, condition etc.*

|  |
| --- |
|  |

**11. Any other relevant information**

*Continue on further sheets, if necessary.*

|  |
| --- |
|  |

**12. Assessing your bursary application – Data Protection considerations**

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

1. the school is the Controller of your information
2. BAL is the Processor of your information
3. BAL is registered with the Information Commissioner’s Office and has satisfied the school as to its arrangements regarding the security of any information and documents you may provide as part of your application.

Please note that no application will be considered unless the process as detailed below is followed. **IN MAKING THIS APPLICATION AND COMPLETING THIS FORM YOU WILL BE TAKEN TO HAVE CONSENTED TO THE PROCESSING OF FINANCIAL AND PERSONAL DATA RELATING TO THE APPLICANTS, PERSONAL DATA RELATING TO THE CHILD, AND SENSITIVE PERSONAL DATA RELATING TO THE APPLICANTS AND THE CHILD. RELEVANT INFORMATION MAY BE OBTAINED FROM THIRD PARTIES. YOU ARE ALSO TAKEN TO HAVE CONSENTED TO THE FOLLOWING PROCEDURE:**

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

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

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

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

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

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

**Father/step-father/guardian:** Date:

**Mother/step-mother/guardian:** Date:

**13. Declaration**

We/I have read the application form and have made a complete declaration of our/my income and assets. We/I understand that if we/I are/am offered a bursary for our/my child and accept a place for him/her at the school:

1. the assessment process may also involve interviews and/or home visits by the school or its agent. The school may make use of publically available information in assessing the application;
2. our/my child’s fees account with the school will be credited termly with the amount of the bursary;
3. if the bursary is less than 100% we will be responsible for payment of the remainder of the fees;
4. we/I understand that any award or bursary is subject to annual review and that we/I must complete an annual declaration of our/my financial circumstances on the form sent to us/me by the school and supply all relevant supporting evidence by the return date indicated;
5. we undertake to report immediately any material change in the financial position declared;
6. the bursary 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 attached 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 to evidence our/my financial circumstances;

v) there is in the view of the Principal either unsatisfactory work or conduct;

vi) the school’s resources are insufficient to maintain the level of award.

vii) fees payable by parent or guardian are in arrears/unpaid

**Verification of details**

Please note if you are considered for a bursary you will be required to provide appropriate original documentary evidence to support the information provided within this form. Any original documents provided will be copied and returned to you. The forms required will include:

1. P60
2. Schedule D tax assessment
3. HMRS self-assessment tax certificate (SA302)
4. Pay advice
5. Schedule E tax assessment
6. Report & accounts for the latest year ((including Statement of Profit & Loss and Balance Sheet)
7. Statements of benefits received
8. Child benefit
9. Tax credit
10. Mortgage statement
11. Contents insurance
12. Any other documents deemed appropriate

**14. Checklist**

Please ensure you have completed each section within this application and provided all supporting documents. Use the below checklist by ticking once each section has been completed. We will not process your application if any information is missing.

|  |  |
| --- | --- |
| **Section** | **Tick when complete** |
| Read and understood the bursary policy on the school’s website |  |
| Section 1: Child’s information |  |
| Section 2: Parents’/guardians’ information |  |
| Section 3: Father’s/step-father’s/guardian’s income and expenditure |  |
| Section 4: Mother’s/step-mother’s/guardian’s income and expenditure |  |
| Section 5: Assets |  |
| Section 6: Liabilities |  |
| Section 7: Other assets and income |  |
| Section 8: Main residence |  |
| Sections 9 and 10: Dependents |  |
| Section 11: Provided any other relevant information |  |
| Section 12: Data Protection considerations |  |
| Section 13: Declaration |  |
| Section 14: Checklist |  |
| Section 15: Signatures |  |

**15. Signatures**

**Father/step-father/guardian:** Date:

Please print name in capital letters:

**Mother/step-mother/guardian:** Date:

Please print name in capital letters:

*If the above declaration is signed by only one parent, delete as necessary: \*divorced/separated/widowed/other (if other please state reason)*

\_\_\_\_\_\_

**Please complete and return this application to our Admissions Manager by 30 September 2021 for Y7 bursaries:**

(Applications received after this date will not be considered).

Admissions Manager

The Grammar School at Leeds

Alwoodley Gates

Harrogate Road

Leeds LS17 8GS

E: admissions@gsal.org.uk

**Applications for Y12 bursaries can be submitted at any time but early application is advised as funds are limited.**