

FEE ASSISTANCE

A Guide for Parents and Carers

Academic Year 2023/24

In October 2020, Trustees approved a new Fee Assistance Policy for Michael Hall School (see Appendix 1).

The following document is designed to make the process clear and simple for our parents/carers and ensure that all the information relating to fee assistance is easily available and understood. Any queries about fee assistance process should be directed to creditcontrol@michaelhall.co.uk

GENERAL INFORMATION

Please note that application for fee assistance is required annually. The granting of fee assistance in any given year will NOT automatically be carried into future years and repeat applications must be made if fee assistance is still required.

Because this is the second year of applications under the new policy, we ask that each parent/carer applying for fee assistance reads the following information carefully.

- Due to the cost associated with processing fee assistance, there will be an administration charge for applying for fee assistance. A Schedule of charges can be seen in Appendix 2. These charges will be added to your school account.
- The school has engaged the services of a specialist company to process the sensitive, financial data required to determine the appropriate level of fee assistance. This company is called Bursary Administration Limited (sometimes referred to as BAL). Further information about this company can be found in Appendix 3.
- Applications should be made DIRECTLY to the company, not to the school.
- It is understood that moving to a new fee assistance policy and limiting the maximum available fee assistance available to 30% of fees will prove unmanageable to some parents if implemented too suddenly. Therefore, we have determined that for the first 3 years of the new policy we will gradually reduce reliance on fee assistance by implementing the following maximum fee assistance levels. Please also note that the Trustees will retain the discretion to offer higher percentages of fee assistance in cases where it is deemed appropriate.
 - Year 1 (2021/22) - Maximum fee assistance available 60% of fees due.
 - Year 2 (2022/23) - Maximum fee assistance available 45% of fees due.
 - Year 3 (2023/24 and onwards) - as per the new policy at maximum of 30% of fees due.

PROCESS FOR APPLICATION

If you wish to apply for fee assistance, please take the following steps:

- 1) Complete Appendix 5 - "Fee Assistance Application Form".
- 2) The application form and required accompanying documentation should be sent via email to:

admin@schoolbursaryguide.com
- 3) Please note that the deadline for receipt of application by Bursary Administration Ltd is 6th February 2023.
- 4) Bursary Administration Limited will contact you to secure a telephone meeting with an advisor to discuss the application. Please note that to be considered for fee assistance it is vital that you make yourself available for a consultation meeting with them at a time that suits you, but within a reasonable time frame. Without a meeting, we cannot progress with your application.
- 5) They will also conduct a discreet soft background check. Please be assured that this does not affect your credit rating and is in place in 2022 in lieu of being able to conduct home visits due to the pandemic.
- 6) The company will then compile a report for the school and give a recommendation for fee assistance level.
- 7) A sub-committee of Trustees will meet to approve fee assistance, following which you will receive a letter that confirms the level of fee assistance being offered. This will be sent to you in the w/c 13th March (as long as all required information has been submitted by applicants in good time to BAL).
- 8) You are asked to respond to accept the level of fee assistance being offered via email or letter to creditcontrol@michaelhall.co.uk no later than 22nd March 2023.
- 9) Should you feel that you are sadly unable to retain your child/ren's place at Michael Hall School beyond the current academic year (i.e., after 1st September), please ensure that this is put in writing to creditcontrol@michaelhall.co.uk by the 22nd March 2023. NB: As this falls before the deadline for withdrawing pupils, please note that late confirmation of withdrawal from the school (after 21st March 2023) will be subject to full additional charges for notice period.
- 10) Please note that there is no appeal stage of this process. The only exception might be that you feel pertinent financial information has come to light that may alter the recommendation for fee assistance.
- 11) We ask that all outstanding fees are settled by 31st July, or that a written agreement is in place between yourselves and the school to agree a delay. Without this, you may find the offer of fee assistance suspended.

TIMETABLE

The following timetable outlines the key dates for the fee assistance process for 2023.

Complete by		
<input type="checkbox"/>	6th Feb	Deadline for parents to submit their application for fee assistance to BAL.
<input type="checkbox"/>	Throughout Spring term up until 8 th March	BAL to hold meetings via phone and undertake checks (specific to 2022 during pandemic). Cost of application to be added to parent's school account balance.
<input type="checkbox"/>	W/C 6 th March	Sub-Committee meeting to confirm agreed levels of fee assistance to be offered.
<input type="checkbox"/>	15 th March	Letters send to parents/careers with fee assistance offer via email.
<input type="checkbox"/>	22 nd March	Parents to respond with confirmation of fee assistance acceptance (or submit notice appeal under specific circumstances).
<input type="checkbox"/>	31 st March	Michael Hall School Spring Term Ends
<input type="checkbox"/>	24 th April	First day back for pupils for Summer Term
<input type="checkbox"/>	31 st July	Date by which outstanding fees are to be settled to ensure eligibility for fee assistance (unless expressly agreed otherwise by the school).
<input type="checkbox"/>	11 th Sept	TBC - First day pupils back at school, and date from which agreed fee assistance will be applied for the full academic year.

APPENIDCES

1. Fee Assistance Policy
2. Schedule of charges
3. Information about Bursary Administration Limited
4. Bursary Administration Limited GDPR Policy
5. Fee Assistance Application Form

Appendix 1

MICHAEL HALL FEE ASSISTANCE SCHEME POLICY

Purpose

To define controls and process over the Michael Hall (MH) Fee Assistance Scheme to ensure it is applied fairly and is within the budget and resources of the school.

Scope

The policy applies to fee assistance granted to existing pupils.

Framework

This policy has been informed by best practice from the Independent Schools' Bursars Association (ISBA) and benchmarking with other independent schools.

This policy will be reviewed and approved annually by the Resources Committee of Trustees.

Background

Requests for financial support usually fall into two categories:

- Existing pupils whose place has been offered but parents are unable to fund the tuition fees and/or other costs in full.
- Parents of existing pupils where a change in financial circumstances has resulted in difficulty in meeting tuition fees and may result in the child being withdrawn part way through a stage of education.

Eligibility

- Fee assistance is not available to pupils in their first year at Michael Hall School. This includes pupils who already have siblings at the school (who may or may not receive fee assistance).
- There is no fee assistance for Parent and Child groups or for our Kindergarten (or EFL courses or boarders as and when relevant).
- Pupils staying on beyond Class 12 or joining the school just to study a particular exam course are not eligible.
- Fee assistance is not normally granted to families who experience a reduction in income out of choice (for example, by giving up a job to start their own business or by moving to a lower-paid job).
- New applicants for fee assistance will normally be rejected if they cannot demonstrate that they can reasonably afford the annual fees after the fee assistance funding is applied.

The principle of last resort

Applicants must demonstrate that they have considered all other possible sources of funding and that this is the last resort for funding of school fees.

Fee Assistance Cap

- The maximum fee assistance will be capped at 30% of full fees - discretionary increases to this will be on an exception basis only and approved by the Business Manager, School Principal and Resources Committee Chair.
- It is understood that moving to a new fee assistance policy and limiting the maximum available fee assistance available to 30% of fees will prove unmanageable to some parents if implemented too suddenly. Therefore, we have determined that for the first 3 years of the new policy we will gradually reduce reliance on fee assistance by implementing the following maximum fee assistance levels. Please also note that the Trustees will retain the discretion to offer higher percentages of fee assistance in cases where it is deemed appropriate.
 - Year 1 (2021/22) - Maximum fee assistance available 60% of fees due.
 - Year 2 (2022/23) - Maximum fee assistance available 45% of fees due.
 - Year 3 (2023/24 and onwards) - as per the new policy at maximum of 30% of fees due.

Fee Assistance Budget

The School has limited resources from which it can offer fee assistance. It currently has no endowment funds or other specific reserves set aside for the purpose of financial assistance with fees.

The Fee Assistance Budget will normally be set at 10% of gross fees net of staff discounts.

Within overall budget funding, the School will in normal circumstances set aside each year a Hardship Fund of 2.5% of Gross Fees, for cases of sudden, unforeseen need or where applications meriting fee assistance are received out of the normal calendar cycle for fee assistance, scrutiny and award. This sum will be set within budgetary constraints.

The Fee Assistance Budget and Hardship Fund will be set and approved by the Finance Committee as part of the annual Budgeting process.

Review and Approval Process

Fee assistance awards are generally subject to repeat testing of parental means each year and may be varied upwards or downwards, depending on parental circumstances. Awards may be made for a year or, exceptionally, for a specified number of terms.

Awards are made at the discretion of the Fee Assistance Awards Committee which comprises Trustees on the Resources Committee and the Principal. Award decisions are based on families' financial circumstances (e.g. their savings, investments and realisable assets, as well as income, the size of the family, any other dependants or benefactors), compassionate or other pertinent considerations.

The Application Process

1. The school will contact parents to share the fee assistance process. Those seeking fee assistance are required to complete an application form 'Fee Assistance Application Form' which aims to establish the financial means of the household and whether this is sufficient to pay all, some or none of the required school fees. The form, which requests details of income and capital assets, must be accompanied by full documentary evidence to support the application. The completed form, together with the necessary documentary evidence, must be submitted to Bursary Administration Ltd (BAL). BAL is a 3rd party company that specialises in carrying out financial assessments, in order to establish the likely level of support which would be required in order to allow the child to attend the School.
2. All applications are assessed by BAL. This will involve a visit to the parents' home by BAL to ensure the information has been correctly interpreted and the basis of the financial assessment has been fair. NB: during the 2022 Coronavirus Pandemic, these home visits may be replaced by a combination of telephone meetings and soft background checks. Please note that any families unwilling to share the required information to BAL will not be granted fee assistance.
3. BAL fees and a MH administration charge will be payable by the Fee Assistance Scheme applicant. This charge will be added to the school account.
4. BAL will send a report to the Business Manager and Accounts Team, who prepares a recommendation which is considered by the Fee Assistance Awards Committee and a joint recommendation is then reached.
5. The parents are advised whether their child is to be offered fee assistance or not.
6. Parents offered fee assistance are required to sign a letter accepting the offer and agreeing to any conditions relating to the scheme.
7. Unsuccessful cases are usually the result of either lack of evidence of financial need, concern about the appropriateness of the family making a long-term commitment to fee paying or insufficient availability of fee assistance funds. There is no formal appeal process following the Committee's decision but at the same time no bar to reapplication.

The Case for Assistance - Suitability

The Fee Assistance Awards Committee will consider a number of factors when making the judgement as to the justification for support, and the extent of such support.

Fee assistance funds are limited and those judged most suitable will be given priority as those likely to gain most from the educational provision.

The Case for Assistance - Financial Limitations

The amount of the fee assistance award is influenced by the extent of need. Each case is assessed on its own merits and awards are made accordingly, 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 fee assistance grants are well focussed 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 adults unrelated to the child or by outside sources.
- Where fees are being paid to other schools (or universities) the award will take into account all these outgoings.
- Acknowledging that others might have a different view, the school considers that the following, for example, would not be consistent with the receipt of fee assistance:
 - Frequent or expensive holidays.
 - New or luxury cars.
 - Investment in significant home improvements. A second property/land holding.
 - Other significant discretionary expenditure.

Anticipated length of the funding requirement: the School is more likely to make an award to enable a pupil to complete their time at School than to embark on a commitment to a child at a young age where circumstances suggest a long term commitment to independent education may be unsustainable.

The Case for Assistance - Other Factors

It is recognised that 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 is terminally ill or is unable to secure permanent employment due to poor health.

Existing Pupils - Change in Family/Financial Circumstances

Parents with a child at the School whose financial circumstances suddenly change may apply for a fee assistance explaining their situation. The process is as outlined above.

Reviews

All fee assistance awards are subject to repeat testing of parental means each year and may be varied upwards or downwards depending on parental circumstances and the school's budget. Current bursary holders will be issued with repeat means-testing forms in early January each year for return by the end of the month.

BAL fees and a MH administration charge will be payable by the Fee Assistance Scheme applicant.

For those previously in receipt of fee assistance, the Principal and Business Manager have the discretion to withdraw an award not only where a pupil's progress, attitude or behaviour has been unsatisfactory but also where the parents / guardians have failed to support the school, are disruptive or are persistent late payers.

Where awards are made for a specific period it is the responsibility of the parents to make contact with the Business Manager, if an extension of support is sought, at least half a term before the funding is due to end.

Confidentiality

The School respects the confidentiality of fee assistance awards made to families and recipients are expected to do likewise.

Appendix 2

Schedule of Charges

The cost of the process will be passed from the school to the applicant. This will be added to the applicant's school account at the following rates:

- **First Time applicants*:** £70 + VAT
Phone/internet assessment (Zoom, Teams, Google Meet) for new applications to provide an excel spreadsheet and written narrative report to include background checks and LexisNexis for all parents.
- **Renewal Applicants*:** £50 + VAT
Paper-based assessment using submitted information
- **Cancelled appointments, at less than 48 hours before appointment** 50% of usual charge
- **Aborted appointments, no response from parents if an appointment has been made** 100% of usual charge

*Please note that the school reserves the right to decide to ask any applicant (first time or renewal) to undertake the full £70 assessment if there has been a significant period of time since a previous assessment and/or there are any queries/anomalies/concerns about information submitted.

Appendix 3

What is BAL?

Founded in January 2009, Bursary Administration Limited (BAL) is a unique administration service dedicated to supporting schools and their Bursars by providing Bursary applicant reviews for both new and existing Bursary applications. This can be carried out either by undertaking a Combined Review which will include a home visit giving rise to a narrative report and spreadsheet indicating the family's suitability and recommended Bursary level, or by undertaking a Financial Review based at our office.

BAL now works successfully alongside numerous HMC, GSA, SHMIS, ISA and IAPS schools (and school companies), assisting them in their assessment of applications, and can be found as a service provider on the ISBA website. We believe that we have earned a reputation as a reliable and effective service for schools and as a source of advice for parents.

All work is undertaken by appropriately-trained and vetted staff and full confidentiality is guaranteed (we are registered with the Information Commissioner). Our digital records are stored securely on Microsoft SharePoint and any paper records are stored in locked facilities at our offices. Our work is now fully-compliant with the current requirements of GDPR and we hold a Cyber Essentials Certificate.

BURSARY ADMINISTRATION LTD

Tel	01622 725712
Email	admin@schoolbursaryguide.com www.schoolbursaryguide.com
Company number	6780777
VAT Reg. number	167 9867 35

Appendix 4

BURSARY ADMINISTRATION LIMITED

Data Protection Policy

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 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 Applicants') and schools' sensitive data.

The Registration is renewed automatically and the Data Protection Policy is reviewed in August each year.

The Data Protection Officer is Liz Moseley, and this person holds responsibility for appropriate policies, staff training, record management, data flow and subject access requests.

Procedure

1. Data is received electronically in two ways: either from schools through SharePoint, or by email from Applicants. SharePoint is considered by BAL to be a secure method of holding electronic data and its availability is controlled within BAL. Data received by email from Applicants will also be stored in SharePoint. This storage will always be at sites within the UK.
2. All electronic data will be stored securely for no more than four years
3. If original evidence documents are received from Applicants directly these are returned to the Applicant by 'Signed-for' post at BAL's expense. If any envelopes are returned to BAL as 'uncalled-for' these will be held securely until the papers' whereabouts are queried.
4. If the school requires it BAL will return all evidence documents to the school, whether they are originals or copies, usually by courier (unless otherwise requested)
5. All paper documents which BAL uses for the purpose of making its report to its schools are stored in plastic wallets under lock and key. BAL undergoes the process of removing all papers held from storage once each year: 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.
6. BAL will agree to shred documents before the expiration of one year if expressly requested to do so by Applicants.
7. BAL will agree to delete permanently all data held regarding Applicants, in any form whatsoever, if expressly requested to do so by Applicants
8. All reports will be sent to schools through SharePoint and not emailed

Confidentiality and protection of data in transit

1. All staff are required to sign confidentiality clauses at the time of the commencement of their employment and are expected to abide by these clauses.
2. 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).
3. BAL will never release data to a third party outside of the independent education sector.
4. However, BAL is sometimes requested to share reports between schools to which Applicants may have applied. If this is the case BAL will consider that signature of the application form represents the Applicants' approval and BAL will seek the approval of all schools concerned.
5. All reports will be sent to schools through SharePoint and not emailed. Each school will have its own area within BAL's SharePoint site and this will be password protected.

Ancillary matters

1. Each member of staff will be trained regarding the processing of data, record management, data flow (within the office, whilst mobile with home visitors, to schools), sharing reports, Subject Access requests, and retention and deletion of records.
2. Following consultation with the ICO, BAL advises schools that Applicants are not able to make a Subject Access Request: the ICO considers that being obliged to release reports and the minutes of their Bursary meetings to Applicants would prevent school Governors from being able to reach their decisions in an equitable manner and so consequently from fulfilling this responsibility.
3. BAL considers that any report it produces is the property of the school and BAL will never agree to any request to release a report to the Applicant, unless, notwithstanding 2. above, the school considers that the Applicant should have sight of the report. (It should be noted that the release of the financial information is usually sufficient to answer Applicants' requests.) BAL will maintain a record of any Subject Access request.
4. BAL will inform the school immediately of any breach, the Applicants as agreed with the school, self-refer to the ICO, and maintain a record of this referral.

April 2020
LM (BAL)

For office use (please tick):

New applicant

Renewal

Service required:

Home visit

Online/phone

Financial



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 how 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 process the data, which is provided to us 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 Form will be completed 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.

If you have sent the Application Form and supporting documents straight to BAL by post any original documents will be scanned and returned to you by 'Signed-for' post. Please ensure that you arrange to collect the envelope if a card is left in your letter-box. If any envelopes are returned to BAL as 'uncalled-for' these will be held securely until the papers' whereabouts are queried. BAL will receive applications by email, including scanned supporting documents.

Assessing your application

BAL will contact you to make arrangements for a home visit or telephone/online interview if this has been required by the client school, or to make enquiries which will ensure that any paper financial review is as correct as it can possibly be. As there are time constraints for assessing applications BAL will offer two home visit/telephone 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

All 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 SharePoint 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).

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 | _____ | _____ |
| b) <u>HOME</u> 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 (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 Parent/Carer 1		
PAYE TAX Parent/Carer 2		
DIVIDEND TAXES (Both)		
NI Parent/Carer 1		
NI Parent/Carer 2		
PENSION CONTRIBS 1		
PENSION CONTRIBS 2		
LIFE INSURANCES		
PRIVATE HEALTH		
MORTGAGE		
RENT		
GRD RENT/SERV CHARGE		
HOUSE INSURANCE		
COUNCIL TAX		
LIGHT/HEAT/POWER		
WATER		
OTHER HOUSEHOLD INS		
FOOD <u>INCL</u> SCHOOL LUNCHESES		
CLOTHING		
LANDLINE/BROADBAND PACKAGES		
MOBILES		
TV LICENCE		
SKY/NETFLIX/PRIME Etc		
MEDICAL EXPS		
PET EXPS		
PUBLIC TRANSPORT EXPS		
CAR 1 FINANCE		
CAR 1 FUEL		
CAR 1 TAX/INS/MAINT		
CAR 2 FINANCE		
CAR 2 FUEL		
CAR 2 TAX/INS/MAINT		
BREAKDOWN/PARKING		
UNIVERSITY SUPPORT		
NURSERY FEES		
TUTORS (Academic/Music)		
CHILDCARE		
CHILD/SPOUSAL MAINTENANCE PAID		
PROFESSIONAL FEES		
CHARITABLE DONATIONS		

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

ACTIVITIES		
CHILDREN'S ACTIVITIES		
PARENTS' ACTIVITIES		
HOLIDAYS		

OTHER EXPENSES (eg Tithes):

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

VEHICLE DETAILS:

MAKE	MODEL	REG NUMBER	VALUE

STATEMENT OF AIM

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

ASSETS	PARENT/CARER 1	PARENT/CARER 2	COMBINED
FAMILY HOME			
OTHER UK PROPERTY			
FOREIGN PROPERTY			
CURRENT ACCOUNT			
DEPOSIT ACCOUNT			
SHARES/EQUITIES			
ISAs			
PREMIUM BONDS			
FIXED TERM BONDS			
OTHER INVESTMENTS			
PENSION (IF OVER 55)			
SETTLEMENTS DUE			
DECLARED INSURANCE ITEMS			
VEHICLE VALUE			
VALUE OF BUSINESS			

LIABILITIES (MONIES OWED)	PARENT/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) DOB				
c) Current school				
d) Boarding or day				
e) Annual fees				
f) Compulsory extras				
g) Uniforms				
SUB TOTAL (a-g)				
h) Fees covered by:				
i) School scholarships / bursaries / allowances				
ii) Family assistance				
iii) Other assistance				
iv) Child's income				
SUB TOTAL (hi-iv)				
TOTAL (a-g) LESS (h)				

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.

e) 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***