

3. Income	(See Note)	PARENT 1 £ ANNUAL	PARENT 2 £ ANNUAL	COMBINED £ ANNUAL
a) Gross salary	3(a)			
b) Business profits or self employed earnings	3(b)			
c) Gross pensions				
d) Gross investment income	3(c)			
e) Gross rents received	3(d)			
- Mortgage payments				
- Agents fees				
- Other expenses on rental property				
f) Benefits received	3(e)			
g) Maintenance received	3(f)			
h) School fees received under court order/ separation agreement	3(g)			
i) Family support				
j) Any other income (explain in space below Total Income)				
TOTAL INCOME				

4. Outgoings	(See Note)	PARENT 1 £ ANNUAL	PARENT 2 £ ANNUAL	COMBINED £ ANNUAL
Taxes and Insurance				
a) PAYE on incomes shown in Section 3	4(a)			
b) NI contributions				
c) Tax on dividends received				
d) Pension contributions	4(b)			
e) Life insurance premium				
f) Private medical insurance premium				
Property Expenses				
a) Mortgage payments on main residence	4(c)			
b) Rent – main residence				
c) Household insurances				
d) Council tax				
e) Utilities				
Household Costs				
a) Food				
b) Clothing				
c) Landlines/broadband/TV				
d) Mobiles				
e) Medical expenses				
f) Public transportation				

4. Outgoings continued

Vehicle Expenses	(See Note)	PARENT 1 £ ANNUAL	PARENT 2 £ ANNUAL	COMBINED £ ANNUAL
a) Car finance	4(a)			
b) Fuel				
c) Insurance				
d) Maintenance/Repairs				
Education Expenses				
a) Other school fees				
b) Tutors/lessons				
c) Clubs				
d) Childcare				
Other Expenses				
a) Maintenance paid	4(e)			
b) Loan repayments	4(f)			
c) Long term credit card debt repayments	4(g)			
TOTAL EXPENSES				

5. Capital assets

	(See Note)	PARENT 1 £ ANNUAL	PARENT 2 £ ANNUAL	COMBINED £ ANNUAL
Approximate market value				
a) i) Bank / building society balances	5(a)			
ii) ISA & other investments	5(b)			
b) Value of main residence	5(c)			
c) Value of other properties	5(c)			
d) Value of vehicles	5(d)			
e) Net worth of business	5(e)			
f) Redundancy settlements due				
g) Pension schemes				
h) Insurance settlements due				
TOTAL INCOME				

6. Capital liabilities

(See Note)

PARENT 1 £

PARENT 2 £

COMBINED £

a) Mortgage amount outstanding on principal residence	6(a)			
b) Mortgage outstanding on other properties	6(a)			
c) i) loans	6(a)			
ii) credit cards	6(a)			
iii) finance leases	6(a)			
TOTAL LIABILITIES				

7. Dependent children

(See Note)

APPLICANT

CHILD 2

CHILD 3

CHILD 4

a) Forename				
b) Date of birth				
c) Current school				
d) Boarding or day				
e) Annual fees	7(a) NA			
f) Compulsory extras				
g) Uniforms				
SUB TOTAL (a-g)				
h) Amount of School scholarships / bursaries / discounts	7(a)			
i) Family support				
j) Other support				
SUB TOTAL (h-j)				
TOTAL (a-g) LESS (h-j)				

8. Other relevant information

(Please use this space to tell us anything you feel we ought to know in reviewing this application)

9. Free school meals/pupil premium

Does your daughter currently qualify for free school meals or pupil premium?

Please tick as applicable

YES

If you have ticked "Yes" you must supply evidence of your daughter's qualification for free school meals or pupil premium (as appropriate) in addition to the documents described in Section 10 below.

NO

10. Documents to be supplied

Please provide documentary evidence of the figures provided in this application. **You MUST include ALL bank statements for each parent for the last three months.** In addition, please ensure the School is provided with the items on the checklist below by email or post.

Last 3 payslips for **each** working parent

Last P60 for **each** working parent

Last 3 months bank statements for **each** parent

Latest audited accounts (if own a business)

Latest PAYE self-assessment (if own a business)

Proof of house valuation (may include internet valuation)

Letters confirming amount of government benefits

Latest mortgage statement

Latest loan statement

DECLARATION

After having read the attached notes, **please type the name of each parent in the boxes below** (please see below for exceptions). By typing the names of each parent in the box provided, you are confirming the following:

We/I have read the guidance notes and have made a complete declaration of our/my income and assets and consent to this form and all information supplied with it being shared with Bursary Administration Limited.

We/I understand that if our/my child is offered a bursary and we/I accept a place for her at LEH, the following terms and conditions will apply:

- a) Our/my child's fees account with the school will be credited termly with the amount of the bursary;
- 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 LEH 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 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 stated in the Parent Contract including, without limitation, we/I fail to pay any amounts owed to the School that are not covered by the bursary when such amounts fall due;
 - 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) in the opinion the Head, our/my child's attendance, academic performance or behaviour no longer merits continuation of the bursary;
 - vi) there is a material improvement in our/my financial circumstances; and
 - vii) the School's resources are insufficient to maintain the level of the bursary.

If the declaration below is signed by only one parent, please give reason by ticking as necessary here:

Divorced Separated Widowed Other (state reason)

Signatures:

Parent 1

Date

Parent 2

Date

Please return your completed form by email to: registrar@lehs.org.uk

We strongly recommend that all supporting documents be sent electronically.

Where this is not possible, please post your documents to:

The Registrar
Lady Eleanor Holles School
Hanworth Road
Hampton TW12 3HF

GUIDANCE NOTES

Please read these carefully before completing the Application Form. If you need further help, please contact the LEH Finance Office.

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. PARENTS / 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 the Application Form.

3. INCOME

- Include the gross annual amount of income **FROM ANY SOURCE** for the current or latest financial year
- Profits from a business or profession means the gross amount agreed for taxation purposes. Deductions should only be made in respect of capital allowances, losses and stock relief. Please include the latest set of accounts.
- All investment income, including building society interest, should be shown gross.
- Any rental income from letting or sub-letting of property should be shown gross, with associated expenses shown separately.
- Please list on a separate sheet if necessary ALL social security benefits, naming their type and how long each have been received for.
- All income from maintenance payments, separation allowances and Child Support maintenance must be declared. Arrears in any payments will not be taken in to account.
- Where a parent is required by any Court or legal order to pay part of the school fees then only the part of the fee which is not covered by the order will be used to calculate any grant awarded. Arrears in any payments of part schools fees will not be taken in to account.

4. OUTGOINGS

- Enter income tax and tax on unearned income **TOGETHER**.
- Enter payments to pension schemes.
- Enter principal as well as interest payment on a mortgage for the main residence.
- Include amount of car loan/hire purchase/lease payments.
- Include all spousal maintenance and child support payments.
- Include principal as well as interest payments on personal loans.
- Include only repayment of credit card balances more than 12 months old.

5. PARENTS' / APPLICANTS' CAPITAL ASSETS

The following will be taken in to account:

- a) Monies held on deposit at any bank or building society and the value of investments in stocks and shares at the time of application.
- c) The current market value of the main residence (please estimate).
- d) The current market value of any other properties (please estimate).
- e) If you run your own business or are partners in a business, then you should show the total net worth of the business. Shares in a company not listed on the Stock Exchange should be valued at your share of the net value of the company.

6. PARENTS' / APPLICANTS CAPITAL LIABILITIES

Please detail all other monies owed, together with the lender's name in Section 8 or on a separate sheet if necessary.

7. DEPENDENT CHILDREN

Use column 1 for the child for whom you are applying and columns 2 – 4 for any other dependents.

- a) Please refer to the current academic year

8. ANY OTHER RELEVANT INFORMATION

Please enter in the space provided or on another sheet, if necessary, any details which you feel we should know in reviewing this application including, for example, a significant change in income or outgoings for the coming year.

9. DATA PROTECTION

Information supplied in and with this form will be held securely and only used by the School to administer and assess your bursary application. For more details about how the School uses personal data, please see our Privacy Notice available on the website [here](#).

We will share this form and all information supplied in and with it with Bursary Administration Limited who has been appointed by LEH to assist with our bursary application assessment process. Details regarding how they will handle your data can be located [here](#).

YOU MAY WISH TO KEEP A COPY OF YOUR COMPLETED APPLICATION FORM FOR YOUR OWN RECORDS

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 Microsoft SharePoint 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 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 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 SharePoint 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 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.

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 right 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 review 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: _____

Child's full name _____

Address: _____

Preferred contact telephone number _____

Preferred contact email addresses _____
